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ITALY'S AGRI-FOOD FOREIGN TRADE 2025



CREA Council for Agricultural Research and Economics
Research Centre for Agricultural Policies and Bioeconomy

REPORT CREA

Council for Agricultural Research and Economics (CREA)
Research Centre for Agricultural Policies and Bioeconomy

ITALY'S AGRI-FOOD FOREIGN TRADE 2025

CREA, 2026

REPORT CREA

ITALY'S AGRI-FOOD FOREIGN TRADE

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Agri-food is one of the pillars of the Italian economy and, at the same time, one of the most effective means through which Italy showcases its productive capacity, the value of its supply chains and the quality of its institutions on the global stage.
In an international context characterised by profound geopolitical transformations, the emergence of new trade policies, the evolution of global value chains and growing attention to food security, sustainability and economic resilience, the availability of reliable analytical tools has become essential for guiding public- and private-sector decision-making.
It is in this context that CREA – Research Centre for Agricultural Policies and Bioeconomy – presents the latest edition of its Report on Italy's Agri-Food Foreign Trade. Now in its thirty-fourth edition, the Report reaffirms its role as a permanent scientific observatory on the internationalisation of the agri-food system.
The Report goes beyond documenting trends in exports and imports. It provides an integrated analysis of the economic, production-related and territorial dynamics shaping the sector. It examines destination markets, key supply chains, the product composition of trade, developments in Made in Italy agri-food products and the impact of changes in international trade agreements.
The 2025 edition is particularly significant.
On the one hand, Italian agri-food trade has achieved outstanding results, with exports reaching a record value of more than EUR 72 billion, confirming the competitiveness of Italian businesses and the strong international appreciation of Italian products. On the other hand, the Report highlights how changing global conditions – from rising trade tensions and new tariff policies to persistent logistical and climate-related challenges – call for increasingly timely and in-depth analysis.
One particularly noteworthy development is the growing importance of the agri-food sector in the national economy. In 2025, it accounted for more than 11% of Italy's total exports and over 12% of its imports, confirming its increasingly significant role in the country's economic structure. This trend further underscores the value of the monitoring, analysis and assessment activities carried out by CREA.
The Report also highlights several developments that are likely to become increasingly important in the years ahead: the need to diversify export markets, the evolution of trade relations with major international partners, the strengthening of European supply chains, the effects of protectionist policies and the strategic importance of new trade agreements. These trends confirm that foreign trade is no longer merely one component of economic activity, but has become one of the key ways of measuring the competitiveness, resilience and innovative capacity of a production system.
For these reasons, CREA regards economic analysis not as a mere statistical exercise, but as a public service supporting institutions, public administrations, professional organisations, businesses and the wider scientific community. Indeed, the availability of reliable data and rigorous analysis is essential to the formulation of increasingly effective agricultural, trade and industrial policies.
The Research Centre for Agricultural Policies and Bioeconomy aims to strengthen this role further by inte-

grating traditional economic analyses with advanced monitoring tools, forecasting models, decision-support systems and innovative data-analysis methodologies. In this way, research can make an increasingly tangible contribution to shaping national and European strategies for the development of the agri-food sector and the bioeconomy.

My sincere thanks go to the researchers, authors and all CREA staff who contributed to the preparation of this volume. The Report's scientific quality is the result of a collective effort that demonstrates the value of the expertise within our Centre and confirms CREA's continuing role as a national reference point for the analysis of agricultural policies and the agri-food system.

I hope this publication will continue to serve as a useful tool for understanding ongoing changes, supporting informed decisions and contributing to the competitiveness and sustainability of Italy's agri-food sector and its growth in international markets.

Alessio Tola
Director
CREA - Research Centre for Agricultural Policies and Bioeconomy

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CHAPTER 1

ITALY'S OVERALL AND AGRI-FOOD FOREIGN TRADE



ITALY'S FOREIGN TRADE





1.1 The overall trade balance

In 2025, despite an international environment characterised by geopolitical tensions and market uncertainty, Italy's overall trade balance improved, reaching a surplus of EUR 50.7 billion, compared with EUR 48.3 billion in 2024 (Table 1.1)[1].

This result was driven by the marked reduction in the energy deficit, attributable both to a further decline in energy product prices, particularly those of crude oil and refined petroleum products, and to a decrease in the imported volumes of these products.

In 2025, both total merchandise imports (+3.2%) and total exports (+3.3%) returned to growth, following the decline in the trade value recorded in 2024.

Italy's total merchandise exports reached a record value of EUR 643.1 billion in 2025, more than EUR 20 billion above the 2024 level. These values were substantially higher than those recorded four years earlier, when exports stood at just over EUR 520 billion, and in the pre-COVID period, when they amounted to approximately EUR 480 billion. The increase in export value in 2025 was driven by higher average unit values (+2.6%), while export volumes rose by 0.7%.

Export growth was driven primarily by increased sales of non-durable consumer goods (+9.5%), intermediate goods (+2.7%), and capital goods (+1.3%). By contrast, exports of energy products (-9.7%) and durable consumer goods (-8.9%) declined. In particular, positive trends were recorded for pharmaceutical, medicinal chemical, and botanical products (+28.5%); basic metals and fabricated metal products, excluding machinery and equipment (+9.8%); transport equipment, excluding motor vehicles (+11.6%); and food products and beverages (+4.6%).

Table 1.1 Italy's agri-food (AF) and total trade (values in EUR million)

Year	Imports			Exports			Trade Balance			Normalised Trade Balance (%)		
	Total	AF	AF Share of Total (%)	Total	AF	AF Share of Total (%)	Total	AF	Non-AF*	Total	AF	Non-AF*
2012	380,292	38,690	10.2	390,182	32,132	8.2	9,890	-6,558	16,447	1.3	-9.3	2.4
2013	361,002	39,874	11	390,233	33,708	8.6	29,230	-6,166	35,396	3.9	-8.4	5.2
2014	356,939	41,172	11.5	398,870	34,660	8.7	41,932	-6,512	48,444	5.5	-8.6	7.1
2015	370,484	42,181	11.4	412,291	37,242	9	41,807	-4,939	46,746	5.3	-6.2	6.6
2016	365,579	42,265	11.6	417,077	38,657	9.3	51,498	-3,609	55,107	6.6	-4.5	7.9
2017	401,487	44,519	11.1	449,129	41,098	9.2	47,642	-3,420	51,062	5.6	-4.0	6.7
2018	426,046	43,819	10.3	465,325	42,000	9.0	39,279	-1,819	41,098	4.4	-2.1	5.1
2019	424,236	44,405	10.5	480,352	44,363	9.2	56,116	-41	56,157	6.2	0.0	6.9
2020	373,428	42,512	11.4	436,718	45,370	10.4	63,289	2,858	60,431	7.8	3.3	8.4
2021	480,437	48,639	10.1	520,771	51,211	9.8	40,334	2,572	37,762	4.0	2.6	4.2
2022	660,249	62,171	9.4	626,195	59,196	9.5	-34,054	-2,976	-31,079	-2.6	-2.5	-2.7
2023	591,939	63,974	10.8	625,950	62,993	10.1	34,011	-981	34,992	2.8	-0.8	3.2
2024	574,320	65,810	11.5	622,607	68,217	11.0	48,287	2,407	45,880	4.0	1.8	4.3
2025	592,451	72,452	12.2	643,153	72,027	11.2	50,702	-426	51,127	4.1	-0.3	4.7

** "Non-AF" denotes non-agri-food trade, i.e. total trade excluding agri-food trade*

Source: CREA elaborations based on ISTAT data.

[1] *Unless otherwise specified, the data used in this report are sourced from ISTAT (2025 data are provisional).*

Table 1.2 Italy's total trade by geographical area (values in EUR million)

Geographical Area	Imports			Exports			Trade Balance		Normalised Trade Balance (%)	
	2025	2024	% Change	2025	2024	% Change	2025	2024	2025	2024
EU-27	335,684	326,081	2.9	330,139	316,810	4.2	-5,545	-9,271	-0.8	-1.4
Non-EU European Countries	47,053	48,547	-3.1	94,519	94,294	0.2	47,466	45,748	33.5	32.0
North America	38,058	29,103	30.8	75,961	71,094	6.8	37,903	41,990	33.2	41.9
Central and South America	13,762	12,558	9.6	20,287	20,994	-3.4	6,525	8,436	19.2	25.1
Asia	120,869	119,144	1.4	84,773	83,116	2.0	-36,096	-36,028	-17.6	-17.8
Africa	34,357	36,257	-5.2	20,276	20,041	1.2	-14,081	-16,216	-25.8	-28.8
Oceania	1,041	1,006	3.5	6,511	6,516	-0.1	5,470	5,510	72.4	73.2
Others	1,627	1,622	0.3	10,687	9,741	9.7	9,061	8,119	73.6	71.4
WORLD	**592,451**	**574,320**	**3.2**	**643,153**	**622,607**	**3.3**	**50,702**	**48,287**	**4.1**	**4.0**

Source: CREA elaborations based on ISTAT data.

Conversely, exports declined for sporting goods, games, musical instruments, jewellery, medical instruments, and other products not elsewhere classified (-9.3%); coke and refined petroleum products (-15.3%); and motor vehicles (-6.8%).

Italy's total imports reached EUR 592.5 billion in 2025, a value in line with 2023 and approximately EUR 18 billion higher than in 2024. Despite this increase, the value of imports in 2025 remained well below the 2022 record, when the surge in international prices had pushed imports to EUR 660 billion. For imports, value growth in 2025 was mainly associated with the increase in purchased volumes (+2%), while average unit values rose by 1.1%. The increase in import volumes was entirely attributable to non-durable (+9.2%) and durable (+5%) consumer goods.

Growth in value was mainly attributable to the sharp increase in purchases of pharmaceutical, medicinal chemical, and botanical products (+35.5%). Purchases also increased for products of agriculture, forestry, and fishing (+18.2%); metals and metal products, excluding machinery and equipment (+6.2%); food products and beverages (+6.9%); and machinery and equipment not elsewhere classified (+7.5%). By contrast, imports of crude oil (-28.1%) and refined petroleum products (-10.8%) declined.

With regard to the geographical distribution of total trade flows (Table 1.2), in 2025 imports increased from almost all the main supply markets, with the exception of Africa and non-EU European countries. The value of imports from the EU-27 rose by almost 3%, reaching EUR 335.7 billion in 2025. Outside the EU, North America's contribution to import growth was particularly significant (+30.8%), mainly owing to increased purchases of pharmaceutical, medicinal chemical, and botanical products from the United States. By contrast, purchases of crude oil from OPEC countries and natural gas from Russia declined.

As regards export value growth in 2025, the increase was driven by sales to EU markets (+4.2%), as well as to several major non-EU partner countries, including Switzerland (+16.3%) and the United States (+7.2%). Within the EU, particularly positive trends were recorded for sales to Spain (+10.6%), France (+5.3%), and Poland (+5.8%). Exports to China (-6.6%) and, especially, Türkiye (-23.1%) declined, following the strong growth recorded in 2024.

1.2 Agri-food foreign trade

The value of Italy's agri-food trade continued to grow in 2025. Agri-food exports increased by 5.6% in 2025, reaching a record value of EUR 72 billion. This value was almost twice that recorded ten years earlier and represented an increase of more than EUR 20 billion over the past four years. Agri-food imports rose by 10.1% compared with 2024, reaching EUR 72.45 billion, EUR 6.6 billion more than in the previous year. Compared with 2020, when COVID-19 had caused a contraction in the value of agri-food purchases, the difference amounted to EUR 30 billion in 2025. A substantial share of this increase was attributable to the surge in international commodity prices in recent years, associated with several factors, including post-COVID dynamics, international crises, primarily the war in Ukraine, as well as climate and environmental issues and speculative behaviour.

In 2025, the larger increase in imports than in exports led to a deterioration in the agri-food trade balance, which returned to a slight deficit (EUR -426 million), following the marked improvement in the previous year that had produced a substantial surplus.

With regard to the geographical distribution of agri-food trade, the EU remained the main trading area in 2025, accounting for almost 60% of Italy's exports and 70% of its purchases (Table 1.3). The area's share of agri-food imports decreased compared with 2024 (-0.5 percentage points), whereas its share of exports increased by 1.4 percentage points. Exports performed particularly well in all major European markets, especially Spain and Eastern European countries such as Poland, Romania, and the Czech Republic. By contrast, the share destined for North America fell by approximately one percentage point, from 13.6% in 2024 to 12.5% in 2025, a trend associated with the increase in tariffs imposed by the United States and the consequent reduction in trade flows during the second half of the year. Sales to Mediterranean third countries increased sharply, owing to the strong performance of sales to countries such as Türkiye and Morocco.

On the import side, South America's share as a source of Italy's agri-food imports increased by 0.7 percent-

Table 1.3 Italy's agri-food (AF) trade by geographical area (values in EUR million)

Area	Imports			Exports			Trade Balance		Normalised Trade Balance (%)	
	2025	2024	% Change	2025	2024	% Change	2025	2024	2025	2024
EU-27	50,323	46,054	9.3	42,856	39,662	8.1	-7,466.3	-6,391.7	-8.0	-7.5
Other European Countries (non-Mediterranean)	2,571	2,405	6.9	9,572	9,174	4.3	7,001.5	6,768.9	57.7	58.5
European Mediterranean Third Countries	171	180	-4.8	672	610	10.1	500.9	430.4	59.4	54.5
Asian Mediterranean Third Countries	1,232	1,268	-2.9	1,157	1,028	12.5	-74.9	-239.4	-3.1	-10.4
African Mediterranean Third Countries	1,222	1,304	-6.3	787	718	9.6	-434.6	-586.0	-21.6	-29.0
North America	2,584	2,263	14.2	9,028	9,295	-2.9	6,443.9	7,032.2	55.5	60.8
Central America	797	739	7.9	435	422	3.0	-362.9	-317.1	-29.5	-27.3
South America	5,590	4,593	21.7	808	787	2.7	-4,782.5	-3,805.9	-74.7	-70.8
Asia (non-Mediterranean)	5,193	4,938	5.2	4,853	4,756	2.0	-340.4	-182.4	-3.4	-1.9
Africa (non-Mediterranean)	2,407	1,702	41.4	511	491	4.2	-1,895.3	-1,211.6	-64.9	-55.2
Oceania	362	364	-0.5	1,011	1,014	-0.4	649.0	650.8	47.3	47.2
Others	0	0		336	259	29.7	336.2	259.2	100	100
WORLD	**72,452**	**65,810**	**10.1**	**72,027**	**68,217**	**5.6**	**-425.6**	**2,407.4**	**-0.3**	**1.8**

Source: CREA elaborations based on ISTAT data.

Table 1.4 Trends in Italy's agri-food (AF) trade by geographical area (percentage changes), 2025/2024

Area	Values			Quantity	
	Imports	Exports	NTB (%)[1]	Imports	Exports
EU-27	9.3	8.1	-0.6	3.3	4.5
Other European Countries (non-Mediterranean)	6.9	4.3	-0.8	0.2	2.8
European Mediterranean Third Countries	-4.8	10.1	4.9	13.9	5.4
Asian Mediterranean Third Countries	-2.9	12.5	7.3	-33.2	15.4
African Mediterranean Third Countries	-6.3	9.6	7.3	22.7	-3.7
North America	14.2	-2.9	-5.3	27.2	3.7
Central America	7.9	3.0	-2.1	-11.7	1.0
South America	21.7	2.7	-4.0	13.7	2.9
Asia (non-Mediterranean)	5.2	2.0	-1.5	-10.6	-0.7
Africa (non-Mediterranean)	41.4	4.2	-9.7	4.9	-1.0
Oceania	-0.5	-0.4	0.1	61.3	-1.3
Others		29.7			52.2
WORLD	**10.1**	**5.6**	**-2.1**	**4.5**	**3.8**

[1] The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.
Source: CREA elaborations based on ISTAT data.

age points. In some cases, value growth was associated with the surge in import prices for raw materials such as coffee and raw cocoa; for other products, including beef, hazelnuts, and maize, trends in purchased volumes were consistent with the marked increase in value. The share of imports originating in non-Mediterranean Africa also increased, reaching 3.3%, again partly owing to higher import prices for cocoa and raw coffee, as well as increased flows of fishery products.

The share of imports originating in Asia, the principal non-EU supply market together with South America, declined. Nevertheless, the value of imports from Asia still increased compared with 2024 (+5.2%), albeit at a slower rate than imports from other supply markets.

An analysis of monthly trends provides a clearer understanding of the developments affecting agri-food trade in 2025.

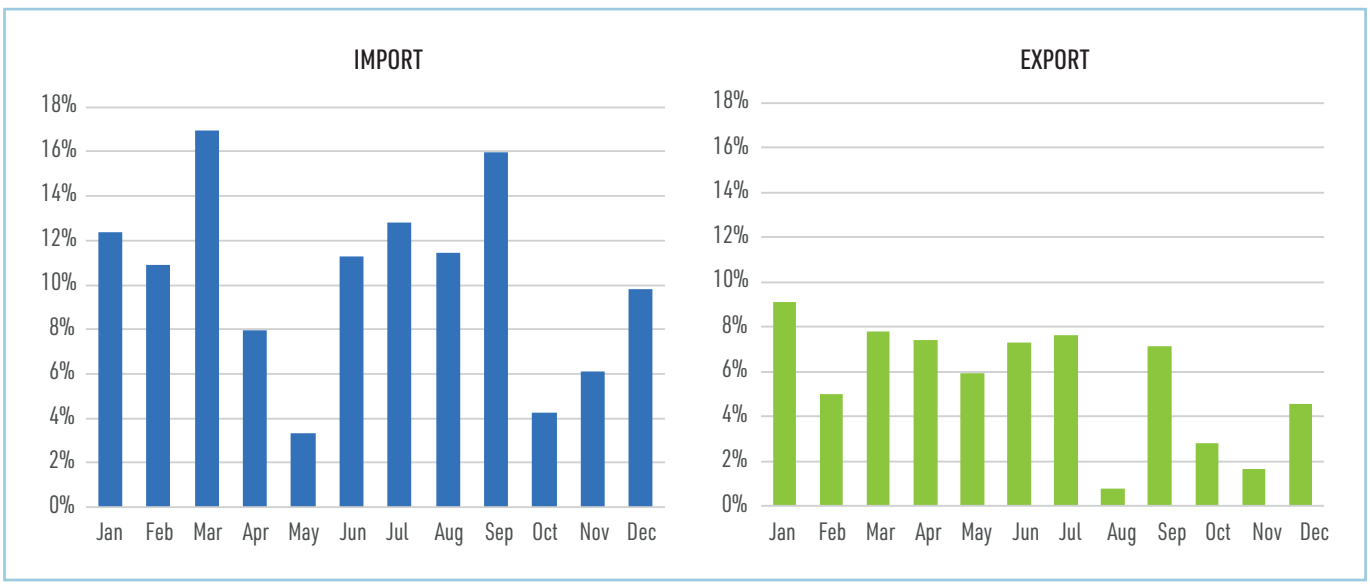
Figure 1.1 shows that both agri-food imports and exports increased relative to 2024 throughout 2025. Although the value of purchases from abroad consistently increased, the rate varied, ranging from +17% in March to +3.3% in May; this highlights the persistence of tensions and uncertainty in international markets, which affect commodity price trends. In addition to March, the year-on-year increase in imports exceeded 15% in September and remained above the 10% threshold in five other months. Together with May, October and November recorded the smallest increases in imports, ranging between 4% and 6%.

For exports, a more uniform trend can be identified between January and July, followed by greater variability in the second half of the year. The latter was associated with the effects of US trade policy, as well as export trends towards other major markets for Italy, such as Germany and Switzerland. Notably, from August onwards, following the increase in US tariffs, the percentage growth rate declined, although it remained positive compared with the corresponding months of 2024. Consequently, increased flows to other destination markets resulted in overall growth in the value of Italian agri-food exports, even during the first months of implementation of the new US trade policy.

Overall, the percentage growth in agri-food imports exceeded that of exports in every month except May, when

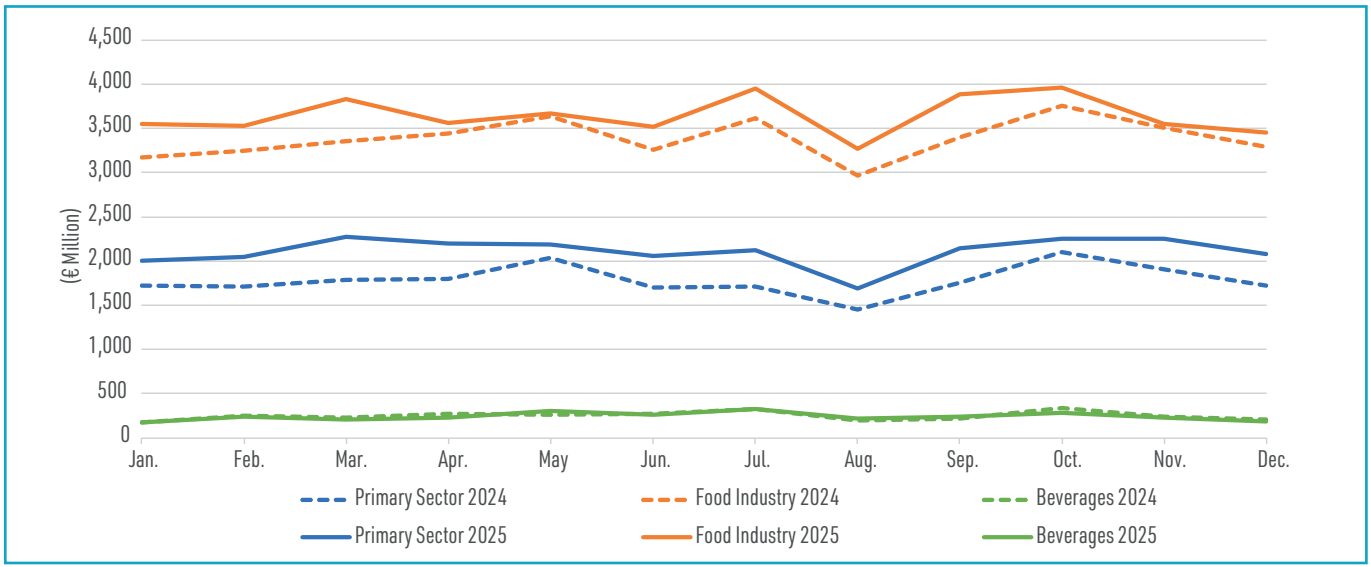
imports recorded their smallest increase.
The increase in imports was supported by both primary products and food-industry products, whose values were higher than in 2024 in every month of 2025 (Figure 1.2). The two sectors followed similar trends, with growth peaks in March, July, and September. For the food industry, the leading import sector in value terms, May and November recorded values close to those of the previous year, although still slightly higher, by approximately 1%. In the primary sector, the smallest year-on-year change, recorded in October, nevertheless exceeded 7%, while March recorded the strongest growth (+27%). By contrast, beverage imports, which account for a limited share of Italy's agri-food imports, declined relative to 2024 in eight of the twelve months of 2025.
Over the year as a whole, the value of primary-sector imports increased by more than 18%, food-industry imports by 7.6%, while beverage purchases contracted by 2.5%.
On the export side, beverages were likewise the only component to decline in 2025 (-2.7%), while exports increased for both the primary sector (+9.6%) and the food industry (+6.6%). Export growth in these two sectors was also observed in every month of 2025, although it was more limited in August, at just under 3%. For the food industry, year-on-year growth returned to a high level in September, at around 10%, before settling at lower but still significant rates of between 3% and 5%.
For beverage exports, which had already contracted relative to 2024 in several months of the first half of the year, the increase in tariffs had a negative impact, given the importance of the United States to this sector. In 2024, the United States was the principal market not only for wine, but also for other alcoholic beverages, jointly with Germany, and non-alcoholic beverages. In 2025, the United States remained the leading destination for Italian wine, despite an 8.8% contraction in sales value. For other alcoholic beverages, the decline exceeded 20%, placing the US market second after Germany. Meanwhile, Italian exports of non-alcoholic beverages to the United States, particularly mineral water, continued to increase in 2025, confirming the positive trend of recent years.

Figure 1.1 Monthly trend in the value of Italy's agri-food trade (year-on-year percentage changes, 2025/2024)



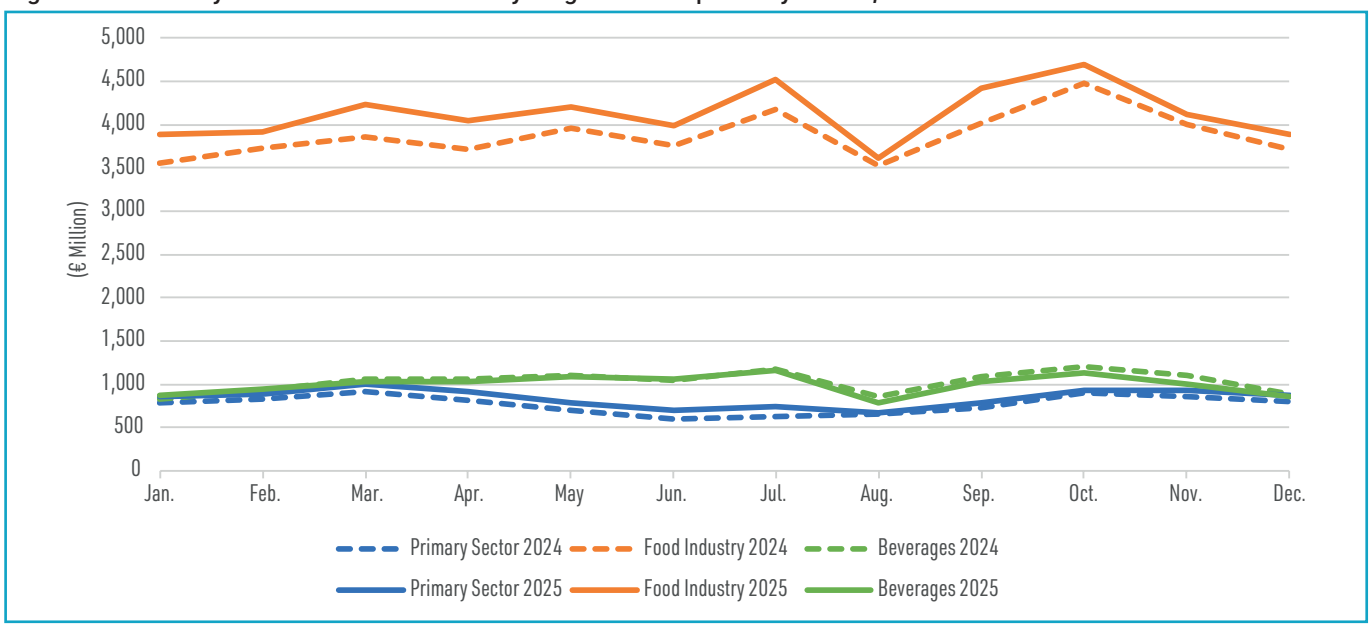
Source: CREA elaborations based on ISTAT data.

Figure 1.2 Monthly trend in the value of Italy's agri-food imports by sector, 2024 and 2025



Source: CREA elaborations based on ISTAT data.

Figure 1.3 Monthly trend in the value of Italy's agri-food exports by sector, 2024 and 2025



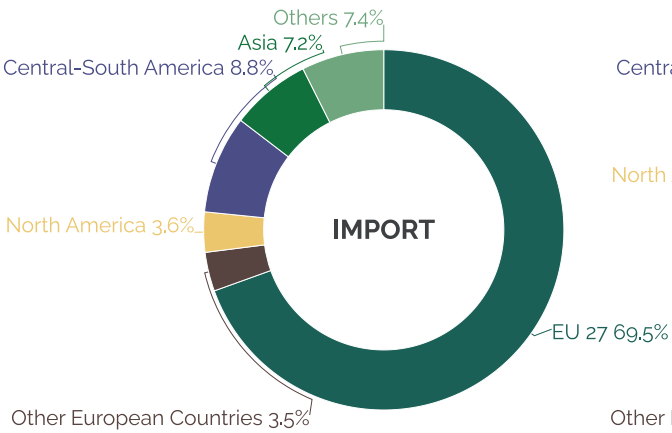
Source: CREA elaborations based on ISTAT data.

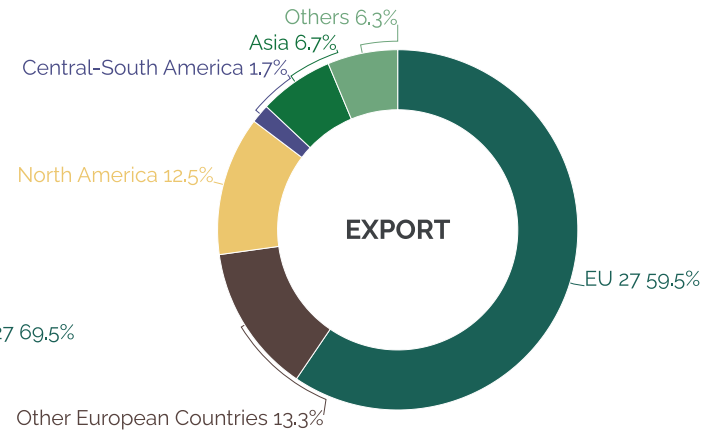
THE GEOGRAPHICAL DISTRIBUTION OF ITALY'S AGRI-FOOD TRADE



CHAPTER 2

DISTRIBUTION OF AGRI-FOOD TRADE BY GEOGRAPHICAL AREA





Percentage Change 2025/2024



EXPORT	+8.1%	-2.9%	+2.8%	+2%	+7.4%	-0.4%
IMPORT	+9.3%	+14.2%	+19.8%	+5.2%	+20.7%	-0.5%

The year 2025 unfolded in an international context marked by growing geopolitical instability and a gradual weakening of the multilateral trading order that had supported globalisation in recent decades. Among the year's most significant developments, particular importance was attached to the shift in US trade policies towards a more protectionist stance, with renewed emphasis on the America First principle. Statements and initial measures by the new administration generated uncertainty among the United States' main trading partners, thereby increasing the risk of renewed tariff tensions and greater fragmentation of international trade.

At the same time, the economic and trade consequences of the conflict between Russia and Ukraine persisted, while tensions in the Middle East and disruptions along some of the main international shipping routes affected logistics costs and the security of global supply chains. In this context, characterised by mounting geopolitical risks and greater attention to economic security, many countries strengthened strategies to diversify supply and destination markets, placing resilience, strategic autonomy, and food security at the centre of trade policy.

For the agri-food sector, these developments confirmed the importance of the geographical diversification of trade and of building stable commercial relationships with a broad range of partners. In this context, analysis of the geography of Italian agri-food trade makes it possible to understand not only the main directions of trade, but also the competitive positioning of the national agri-food system during a period of profound transformation in the world economy.

2.1 Trade dynamics by area and main partner country

In 2025, Italian agri-food trade recorded a significant expansion in international flows: imports reached EUR 72.45 billion, while exports amounted to EUR 72 billion. Compared with 2024, imports increased by 10.1%, whereas exports recorded a more moderate increase of 5.6%.

In 2025, the value of imports grew more rapidly than that of exports. This trend reflects the increase in international prices for certain commodities, stronger domestic demand, and Italy's increasing integration into global agri-food supply chains. Despite the substantial rise in exports, the growth differential between imports and exports reduced the sector's trade balance compared with the previous year. Nevertheless, the Italian agri-food system confirmed its competitiveness in foreign markets, particularly in high-value-added segments.

The geographical analysis confirms the central role of the European Union, Italy's main trading partner. The EU-27 accounts for 59.5% of Italian agri-food exports and supplies 69.5% of imports. Trade with the EU increased significantly for both imports (+9.3%) and exports (+8.1%). This trend confirms the strong integration of European agri-food supply chains and the role of the single market as the sector's principal trading area. Among non-EU areas, non-Mediterranean Other European Countries (OECs) account for 13.3% of Italian exports and 3.5% of imports, with increases of 4.3% and 6.9%, respectively. Exports to Mediterranean Third Countries (MTCs) were particularly dynamic, especially towards Asian (+12.5%), European (+10.1%), and African (+9.6%) countries, indicating growing penetration of Mediterranean export markets. North America remained one of the principal destination markets for Italian agri-food products, absorbing 12.5% of total exports. However, exports to the area declined by 2.9% in 2025, while imports increased by 14.2%. This trend suggests a temporary slowdown in demand and stronger competition in North American markets associated with the new US trade policy. Given the strategic

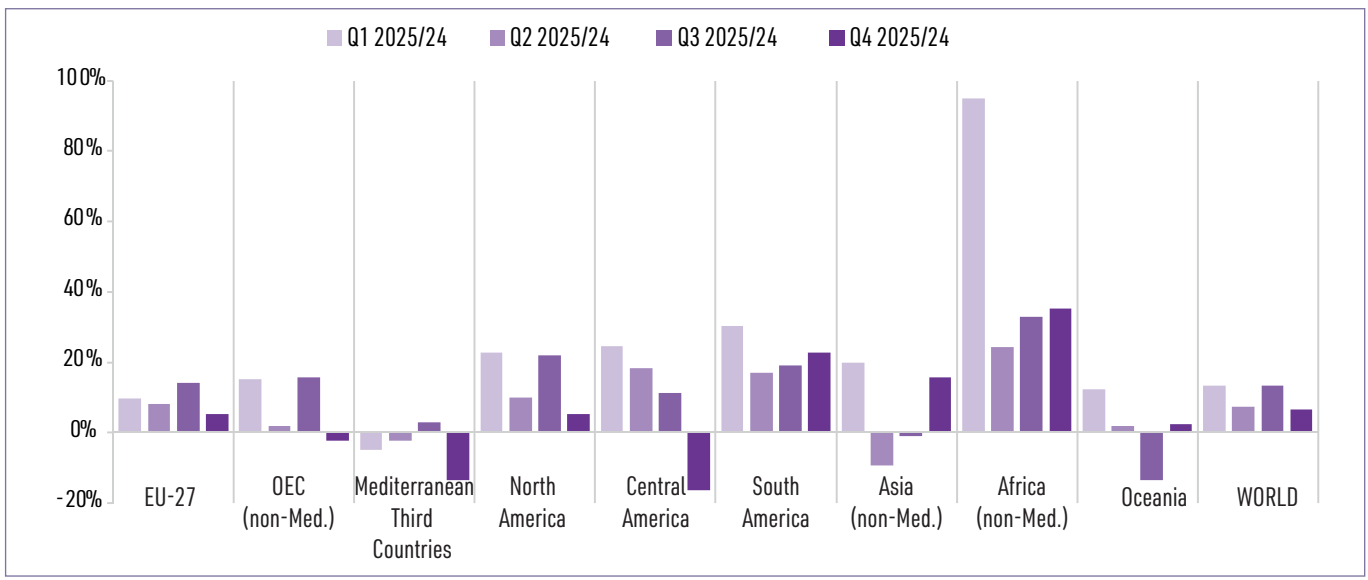
Table 2.1 Distribution and trends in agri-food trade by geographical area

	Share % 2025		Percentage Change 2025/2024	
	Imports	Exports	Imports	Exports
WORLD	100	100	10.1	5.6
EU-27	69.5	59.5	9.3	8.1
Other European Countries (non-Mediterranean)	3.5	13.3	6.9	4.3
European Mediterranean Third Countries	0.2	0.9	-4.8	10.1
Asian Mediterranean Third Countries	1.7	1.6	-2.9	12.5
African Mediterranean Third Countries	1.7	1.1	-6.3	9.6
North America	3.6	12.5	14.2	-2.9
Central America	1.1	0.6	7.9	3.0
South America	7.7	1.1	21.7	2.7
Asia (non-Mediterranean)	7.2	6.7	5.2	2.0
Africa (non-Mediterranean)	3.3	0.7	41.4	4.2
Oceania	0.5	1.4	-0.5	-0.4
Others	0.0	0.5	-	29.7

Source: CREA elaborations based on ISTAT data.

importance of this market for high-quality Italian agri-food products, this development represents one of the main discontinuities compared with previous years.
On the import side, purchases from South America (+21.7%) and non-Mediterranean Africa (+41.4%) increased particularly strongly, suggesting a growing search for alternative suppliers of agricultural raw materials such as cereals, oilseeds, coffee, cocoa, and feed in an international environment marked by climate variability and geopolitical tensions.
Overall, the evidence points to increasing international openness in the Italian agri-food system, together with the progressive diversification of import sources and destination markets.
The quarterly analysis (Figure 2.1) highlights widespread growth in Italian agri-food imports throughout 2025, although at different rates across geographical areas. The European Union displayed a relatively steady trend, with increases ranging from 5% to 14% across the quarters, confirming its role as a structural supplier to the Italian agri-food system. Mediterranean Third Countries (MTCs), by contrast, recorded a negative trend, particularly in the final quarter (-13.4%), owing partly to the contraction in purchases of nuts from Türkiye, the leading agri-food supplier in this area.
Non-Mediterranean Africa recorded the strongest acceleration in Italian purchases, with growth rates ranging from 25% to 95% across the quarters. The marked increase in Italian imports from the area was mainly associated with higher purchases of cocoa and green coffee, confirming a change in the geographical pattern of Italy's sourcing of these products.
South America also recorded sustained growth throughout the year, consistent with the sharp increase in annual imports reported in Table 2.1. This trend was driven primarily by growth in purchases of green coffee (in value terms only), animal feed and beef. Oceania showed a more moderate and irregular pattern, alternating between quarterly growth and contraction.

Figure 2.1 Quarterly trend in the value of Italy's agri-food imports by area of origin (year-on-year percentage changes)



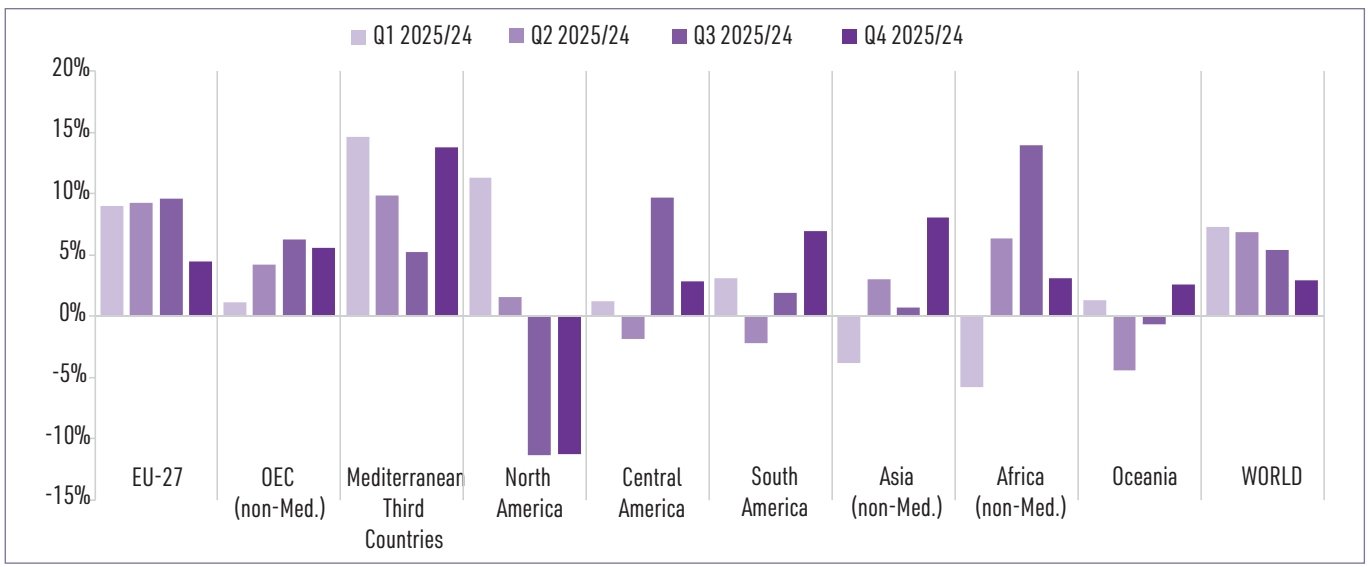
Source: CREA elaborations based on ISTAT data.

Non-Mediterranean Asia likewise displayed highly uneven trends, with sharp increases in the first and fourth quarters. Here too, developments in the price of green coffee, the leading import product from the area, played a role, together with flows of vegetable and animal oils and fats.

The quarterly analysis suggests that import sourcing was more dynamic than export sales. This may be interpreted as a sign of strengthening domestic demand and rising procurement costs for agricultural raw materials. On the export side, the European Union recorded a steady increase in purchases of Italian agri-food products, with growth rates of between 9% and 10% in the first three quarters, followed by a slowdown in the fourth quarter. This confirms the robustness of European demand for Italian agri-food products. Italian exports to MTCs were particularly dynamic, rising throughout the year and exceeding 10% in some quarters, thereby indicating growing interest in Italian products across Mediterranean markets. By contrast, after strong growth in the first quarter, North America weakened markedly in the second half of the year: exports to Canada remained stable compared with the same period of 2024, while exports to the United States fell by approximately 13.5%, affected by the increase in US tariffs. In this regard, the chapter includes an in-depth analysis of Italy's agri-food trade with the United States in 2025. Non-Mediterranean Asia and South America also showed uneven trends, contracting in one quarter and growing during the remainder of the year. For both areas, the fourth quarter recorded the best result, with Italian agri-food exports increasing by 7-8%. In Asia, double-digit growth was recorded in the final three months in three of the area's five leading destination markets, namely China, South Korea and the United Arab Emirates. Exports to China were driven by confectionery and bakery products, as well as olive oil and beer. China accounts for approximately one quarter of global beer consumption, in a context of rising purchasing power and stronger demand for high-quality craft beers.

For Japan, Italy's leading Asian market for agri-food

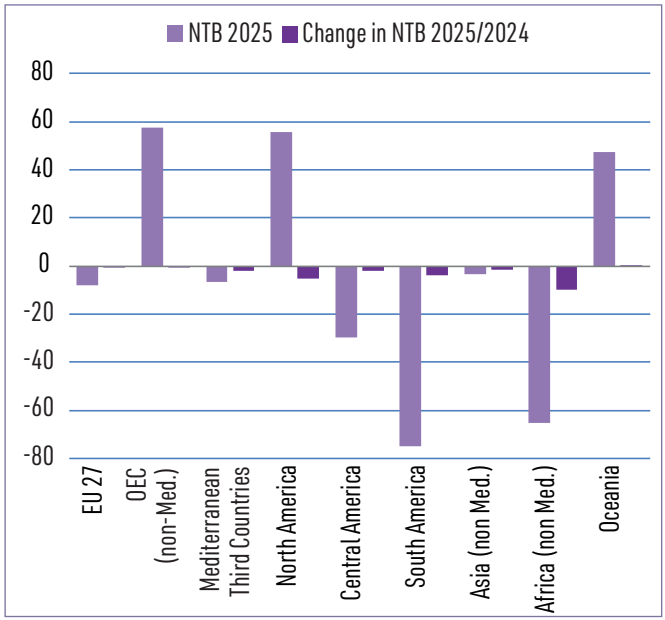
Figure 2.2 Quarterly trend in the value of Italy's agri-food exports by destination area (year-on-year percentage changes)



Source: CREA elaborations based on ISTAT data.

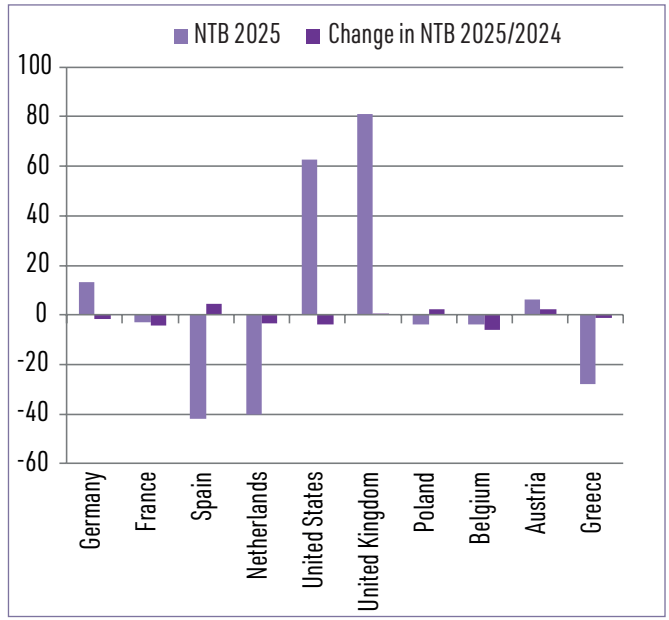
products, the increase in the final quarter followed contractions during the first nine months. The recovery in the latter part of the year was driven by higher sales of confectionery products, cheese and PGI wines.
Overall, Figure 2.2 confirms that growth in Italian exports in 2025 was supported primarily by European and Mediterranean markets.
The clearly positive balances with North America, the United Kingdom and other European countries confirm the ability of the Italian agri-food industry to place high-quality, high-value-added products on foreign markets.
The normalised trade balance measures the degree of trade specialisation with an area, taking positive values in the presence of a trade surplus and negative values in the presence of a deficit (Figure 2.3). In 2025, Italy maintained a strong trade surplus with non-Mediterranean Other European Countries and North America, with normalised balances above 50%. This indicates the strong competitiveness of Italian agri-food products in these markets. By contrast, balances with South America and non-Mediterranean Africa were particularly negative, as Italy imports agricultural products and raw materials from these areas. The European Union showed a slightly negative balance, reflecting the strong integration of agri-food value chains, Italy's substantial export capacity and the high incidence of imports from EU partners. Compared with 2024, changes in normalised balances were generally limited, indicating broad stability in the competitive structure of Italian agri-food trade. The normalised balance with North America remained clearly positive, above 55%, despite declining by 5.3%. This contraction reflected both lower exports to the United States and the sharp increase in imports from Canada (+26%), driven by higher cereal purchases and, once again, by the marked rise in the import price of semi-processed cocoa products.
The country-level analysis (Figure 2.4) reveals marked differences in Italy's competitive position. The largest surpluses were recorded with the United Kingdom and the United States, with normalised balances above 60%, demonstrating the strong capacity of Italian agri-food products to generate net exports in these markets. Balances with Germany and Austria were also positive, albeit to a lesser extent.
The largest deficits were recorded with Spain and the Netherlands, both important suppliers of agricultural products and logistics hubs for European trade. Normalised balances with France and Belgium were also negative, although less markedly so.
The balance with France deteriorated further owing to higher purchases of cattle for rearing. This is the leading import product by value from the French market, which is Italy's main supplier, accounting for more than 85%.
By contrast, the negative normalised balance with Spain improved (+4.4% compared with 2024), owing to the sharp rise in exports (+12.9%). Growth was supported by the excellent performance of processed products, including confectionery, cheese and roasted coffee, as well as fruit, particularly apples and kiwifruit.
Table 2.2 shows the structure of Italian agri-food imports in 2025, confirming the predominance of European partners. France, Germany and Spain together accounted for more than 35% of total imports. France remained the leading supplier, at EUR 8.54 billion and growth of 15.2%, followed by Germany at EUR 8.49 billion (+9.4%) and Spain at EUR 8.33 billion (+1.4%). Particularly noteworthy were the expansion of imports from the Netherlands (+18.1%), Brazil (+19.2%), Romania (+26.1%) and Canada (+26.3%), indicating a progressive diversification of supply sources. The few countries recording contractions included Indonesia (-20.5%), Türkiye (-3.4%) and Hungary (-0.6%). In the case of Indonesia, this reflected the collapse in imports of palm oil for non-food use, also associated with stricter environmental rules and the implementation of EU legislation providing for the progressive phase-out of palm oil from biofuels and a reduction in incentives.
Overall, the structure remains heavily concentrated in Europe, although major non-European agricultural exporters are becoming increasingly prominent. The high share of the leading European partners reflects the

Figure 2.3 Trend in the agri-food normalised trade balance (NTB) by area, 2025/2024 (%)



Source: CREA elaborations based on ISTAT data.

Figure 2.4 Trend in the agri-food normalised trade balance (NTB) by country, 2025/2024 (%)



Source: CREA elaborations based on ISTAT data.

continent-wide integration of production chains and the role of the main Western European trading hubs. In this context, the increase in imports from the Netherlands may also be attributed to the country's logistics and distribution function within European networks. The expansion of imports from Brazil (+19.2%) was largely attributable to the previously mentioned increase in the international price of green coffee, for which Brazil is Italy's leading supplier, but also to higher purchases of other products, including maize following declines in the previous two years, essential oils and sugar.

With regard to destination markets, Table 2.3 confirms Germany as the leading market for Italian agri-food exports, at more than EUR 11 billion, equivalent to 15.4% of the total. France followed with a share of 11.1%, and the United States with 10.5%.

Among the principal markets, particularly dynamic performances were recorded by Poland (+18.7%), Romania (+11.2%), Spain (+12.9%), the Czech Republic (+14%) and Croatia (+12.9%). These results point to strong growth in Italian exports to Central and Eastern Europe, where export values have nearly doubled over the past four years in several cases.

Poland is a particularly significant case: in 2025, Italian agri-food exports to the Polish market were worth more than EUR 2.3 billion, over EUR 1 billion more than in 2021. The Made in Italy products that were particularly well-regarded were primarily processed goods, including confectionery, roasted coffee and preserved tomatoes, as well as certain agricultural products, foremost among them table grapes, exports of which exceeded EUR 78 million in 2025.

Particularly noteworthy, by contrast, was the decline in exports to the United States (-4.2%) and Japan (-5.9%), interrupting a prolonged period of growth in two historically strategic markets for Italian agri-food products. In Japan, the decline reflected moderate economic growth in 2025, weak domestic consumption

Table 2.2 Structure of Italy's agri-food imports: top 20 countries of origin

Countries	Values (EUR Million)		Share (%)		Percentage Change 2025/2024	
	2025	2024	2025	Cumulative	Values	Quantity
France	8,538.9	7,409.3	11.8	11.8	15.2	13.2
Germany	8,494.6	7,766.2	11.7	23.5	9.4	14.2
Spain	8,329.6	8,214.3	11.5	35.0	1.4	3.1
Netherlands	6,577.4	5,571.4	9.1	44.1	18.1	26.9
Poland	2,506.4	2,221.7	3.5	47.5	12.8	5.6
Brazil	2,441.3	2,048.8	3.4	50.9	19.2	2.4
Belgium	2,372.6	2,009.9	3.3	54.2	18.1	9.3
Greece	1,993.6	1,798.7	2.8	56.9	10.8	-1.9
Austria	1,973.0	1,943.3	2.7	59.7	1.5	-3.8
Hungary	1,810.1	1,820.6	2.5	62.2	-0.6	-20.2
United States	1,721.9	1,580.5	2.4	64.5	8.9	13.4
Ukraine	1,279.5	1,185.3	1.8	66.3	7.9	-1.8
Türkiye	1,133.1	1,173.0	1.6	67.9	-3.4	-33.8
Argentina	1,110.0	956.2	1.5	69.4	16.1	33.2
Denmark	1,109.0	1,086.6	1.5	70.9	2.1	4.2
Slovenia	1,080.5	1,067.1	1.5	72.4	1.3	-9.2
Indonesia	968.6	1,218.2	1.3	73.8	-20.5	-31.9
China	949.8	859.5	1.3	75.1	10.5	10.6
Romania	869.2	689.2	1.2	76.3	26.1	18.7
Canada	862.3	682.7	1.2	77.5	26.3	41.3
WORLD	72,452.5	65,809.6	100	100	10.1	4.5

Source: CREA elaborations based on ISTAT data.

and the depreciation of the yen against the euro, which affected demand for high-value products such as Italian agri-food goods.

Although Italy's presence in international markets is widely diversified, its agri-food exports continue to display a significant degree of geographical concentration. The top three destination markets account for more than one third of total exports. Owing to the decline in flows (-4.2%), the United States returned to third place among agri-food customers after moving into second position in 2024 following growth of 17.4%.

In 2025, the structure of Italian agri-food imports displayed highly differentiated trends across sectors and supplier countries (Figure 2.5). The figure shows the product composition of imports from the main suppliers, distinguishing the primary sector, the food industry and beverages. France, Germany and Spain were the largest suppliers. In the case of Germany, processed products accounted for a clearly larger share, whereas primary-sector purchases also played an important role for Spain and France. For France, this reflected the above-mentioned purchases of cattle for rearing, which rose sharply; for Spain, fresh and chilled fish products, together with fresh and dried fruit, were among the main import items. Imports from the Netherlands grew strongly in both the primary and industrial components, as was also observed for Poland and Brazil. For Brazil, the primary sector predominated: green coffee and soybeans accounted for more than 70% of agri-food flows to Italy. Overall, Figure 2.5 shows that import growth was driven by both processed products and, above all, agricultural raw materials from European and non-European countries.

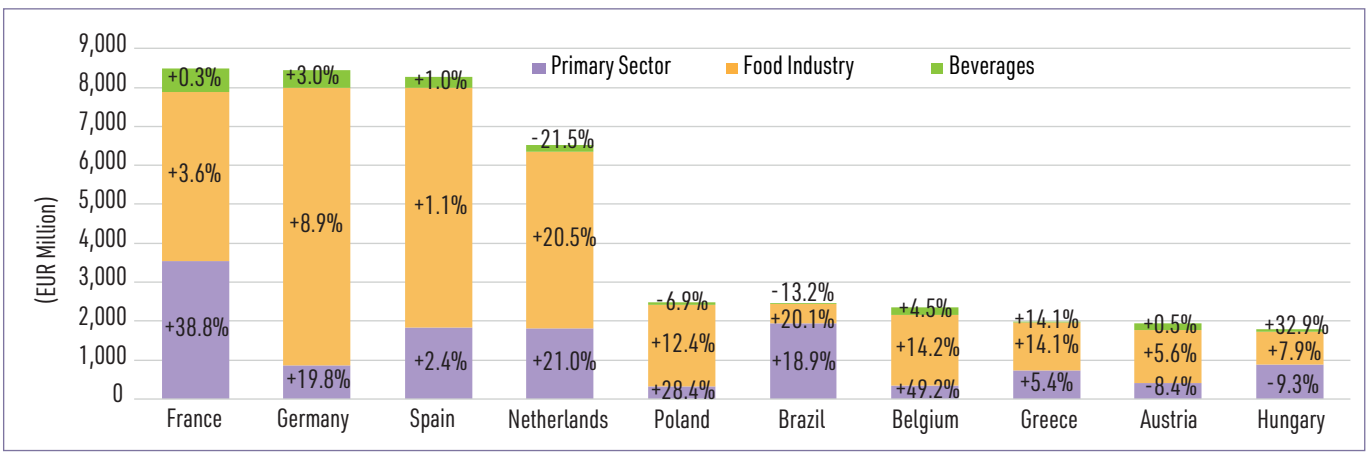
Figure 2.6 presents Italy's main export markets, high-

Table 2.3 Structure of Italy's agri-food exports: top 20 destination countries

Countries	Values (EUR Million)		Share (%)		Percentage Change 2025/2024	
	2025	2024	2025	Cumulative	Values	Quantity
Germany	11,096.0	10,495.9	15.4	15.4	5.7	3.8
France	8,019.3	7,552.4	11.1	26.5	6.2	3.1
United States	7,547.1	7,878.3	10.5	37.0	-4.2	2.8
United Kingdom	4,925.5	4,787.8	6.8	43.9	2.9	2.7
Spain	3,425.5	3,032.8	4.8	48.6	12.9	7.8
Netherlands	2,801.0	2,557.8	3.9	52.5	9.5	8.1
Switzerland	2,399.0	2,307.4	3.3	55.8	4.0	4.3
Poland	2,323.2	1,957.9	3.2	59.1	18.7	6.1
Austria	2,245.0	2,102.9	3.1	62.2	6.8	2.1
Belgium	2,206.8	2,105.8	3.1	65.2	4.8	1.2
Canada	1,477.6	1,413.0	2.1	67.3	4.6	9.7
Romania	1,129.4	1,015.4	1.6	68.9	11.2	7.8
Greece	1,124.0	1,042.9	1.6	70.4	7.8	0.6
Sweden	1,031.5	970.8	1.4	71.8	6.3	5.9
Japan	953.8	1,013.4	1.3	73.2	-5.9	-3.0
Czech Republic	953.1	836.0	1.3	74.5	14.0	14.6
Denmark	935.7	875.8	1.3	75.8	6.8	0.9
Australia	894.3	891.0	1.2	77.0	0.4	-0.8
Croatia	801.4	709.7	1.1	78.2	12.9	0.0
Russia	680.1	675.2	0.9	79.1	0.7	-15.1
WORLD	72,026.9	68,217.0	100	100	5.6	3.8

Source: CREA elaborations based on ISTAT data.

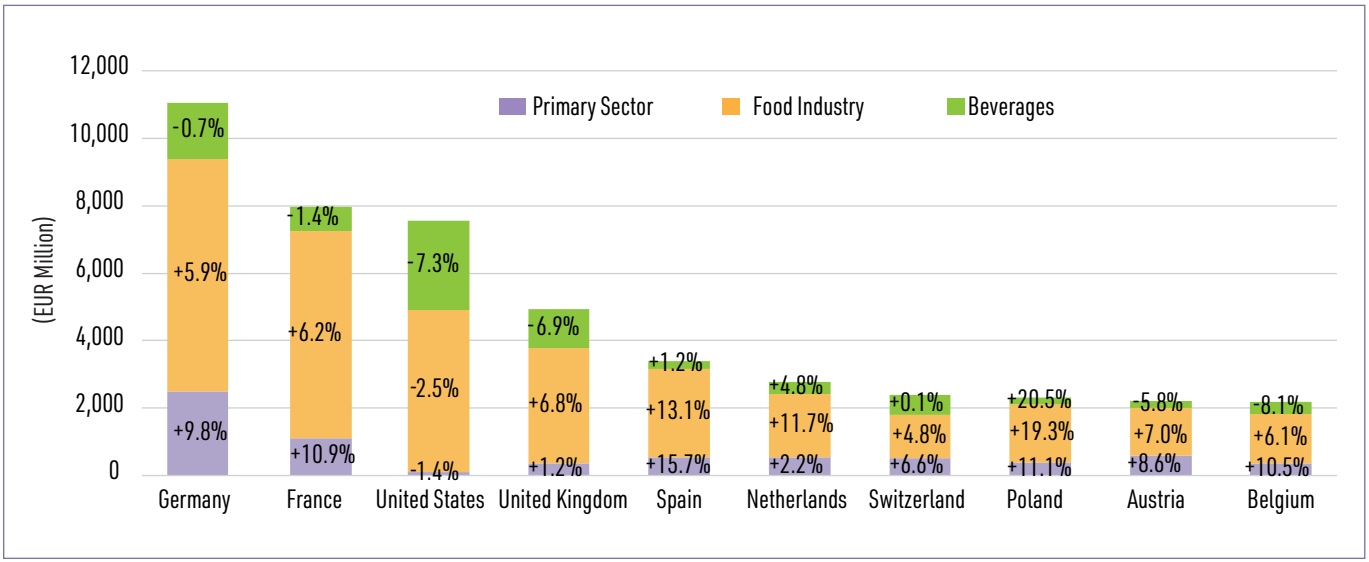
Figure 2.5 Structure and trend of Italy's agri-food imports from the main suppliers, 2025 (values and percentage changes, 2025/2024)



Note: Values within the graph indicate the percentage change in trade in the sector compared to the previous year.

Source: CREA elaborations based on ISTAT data.

Figure 2.6 Structure and trend of Italy's agri-food exports to the main destination markets, 2025 (values and percentage changes, 2025/2024)



Note: Values within the graph indicate the percentage change in trade in the sector compared to the previous year.

Source: CREA elaborations based on ISTAT data.

lighting the structure and trend of exports. Sales were heavily concentrated in the food industry, which was the predominant component in all major destination markets. Germany, France and the United States were the largest markets, with values well above those of the other partners. In Germany, the primary component was above average and increased in value by almost 10% compared with 2024. It consisted mainly of fruit and vegetables, particularly table grapes, apples, salads and kiwifruit, all of which recorded higher values in 2025. Italian floriculture products were also particularly valued in Germany, especially outdoor plants, which were worth almost EUR 100 million on the German market in 2025. Beverages accounted for a particularly large share in English-speaking markets, where the primary sector maintained a relatively limited share. The slowdown in exports to the United States was clearly reflected in the contraction of the industrial and beverage components, while some European markets, particularly Spain and the Netherlands, recorded marked growth.

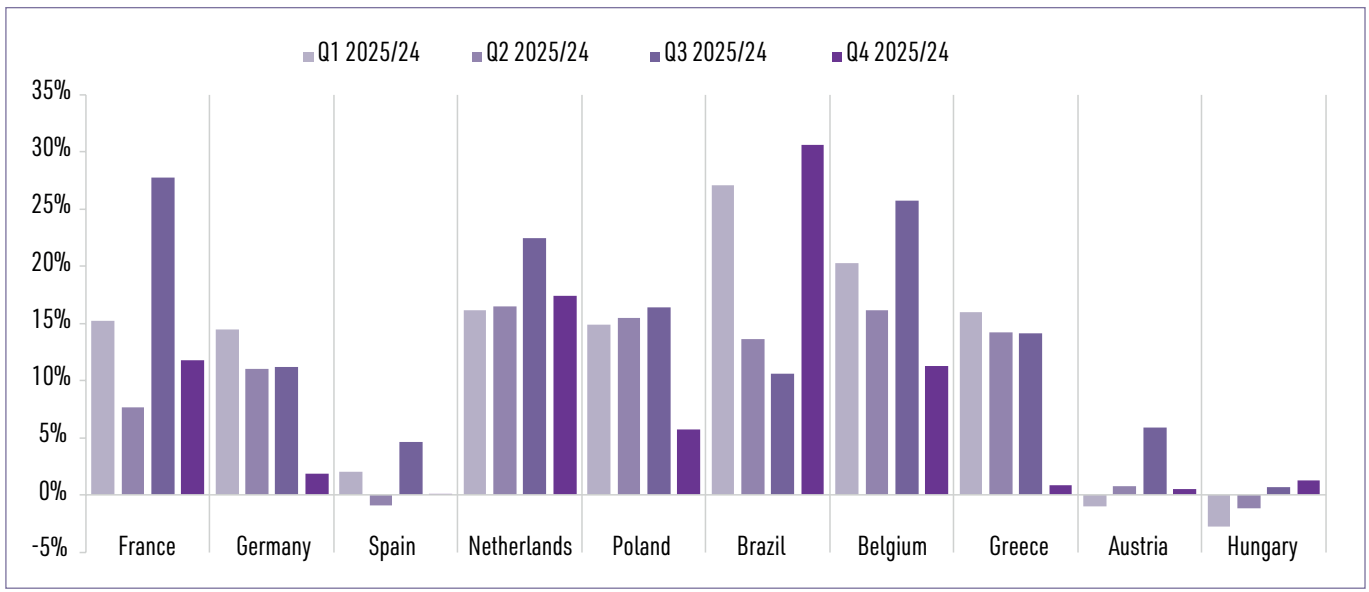
The quarterly country-level analysis shows highly heterogeneous trends among the principal suppliers (Figure 2.7). Brazil recorded the highest growth rates, with increases exceeding 25-30% in some quarters, owing to the factors described above. Belgium and the Netherlands also displayed particularly positive trends, as did France and Poland. For Germany, as for Poland and Greece, the final quarter saw a moderation in the upward trend of Italian imports.

Spain, by contrast, recorded generally more modest increases, with a slight contraction in the second quarter. Overall, Figure 2.7 confirms that growth in Italian imports in 2025 was driven mainly by expanding purchases from the most dynamic countries of Central and Northern Europe and from Brazil, contributing to the strong overall increase in the value of agri-food imports.

The quarterly analysis of exports by destination country shows differentiated trends across the principal mar-

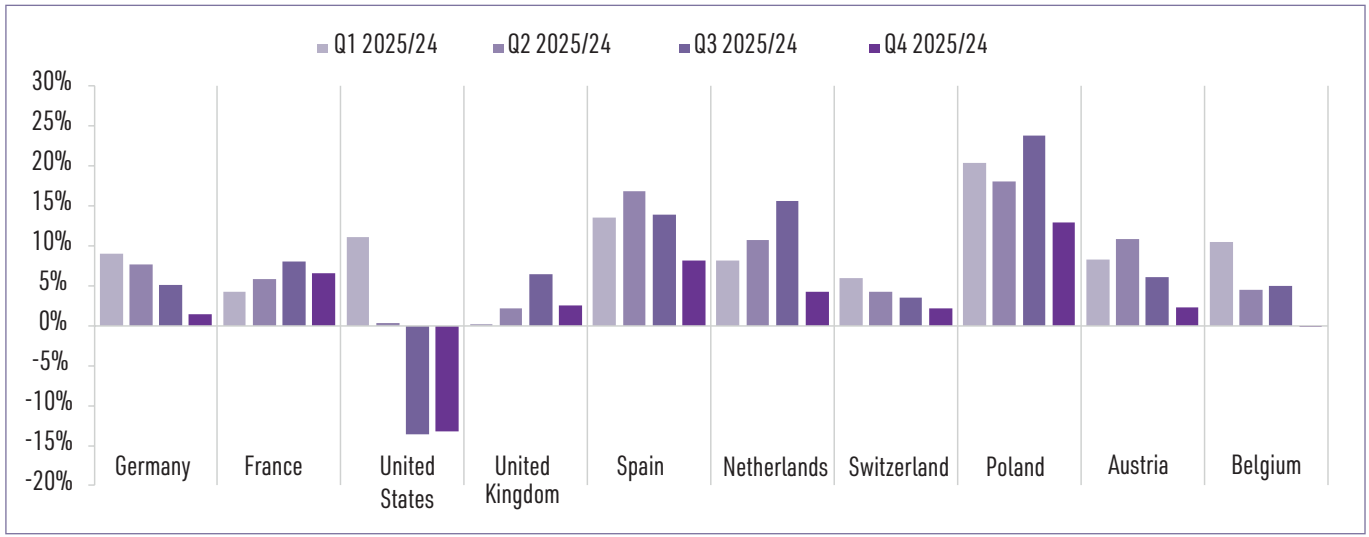
kets. In many cases, although remaining above 2024 levels, export growth tended to moderate towards the end of the year. This pattern was particularly evident for Germany, Spain, the Netherlands and Austria.
Among the principal destination markets, Poland recorded the best performance throughout 2025, confirming the growing dynamism of demand for Italian agri-food products. Spain also performed particularly strongly during the year.
The only exception was the United States, where an 11% increase in value during the first three months and broad stability in the second quarter were followed by year-on-year contractions of approximately 13.5% in the second half, affected by the change in trade policy.
France recorded relatively stable growth throughout the year, regaining second place as a destination market for Italian agri-food products.

Figure 2.7 Quarterly trend in the value of Italy's agri-food imports by country of origin (year-on-year percentage changes)



Source: CREA elaborations based on ISTAT data.

Figure 2.8 Quarterly trend in the value of Italy's agri-food exports by destination country (year-on-year percentage changes)



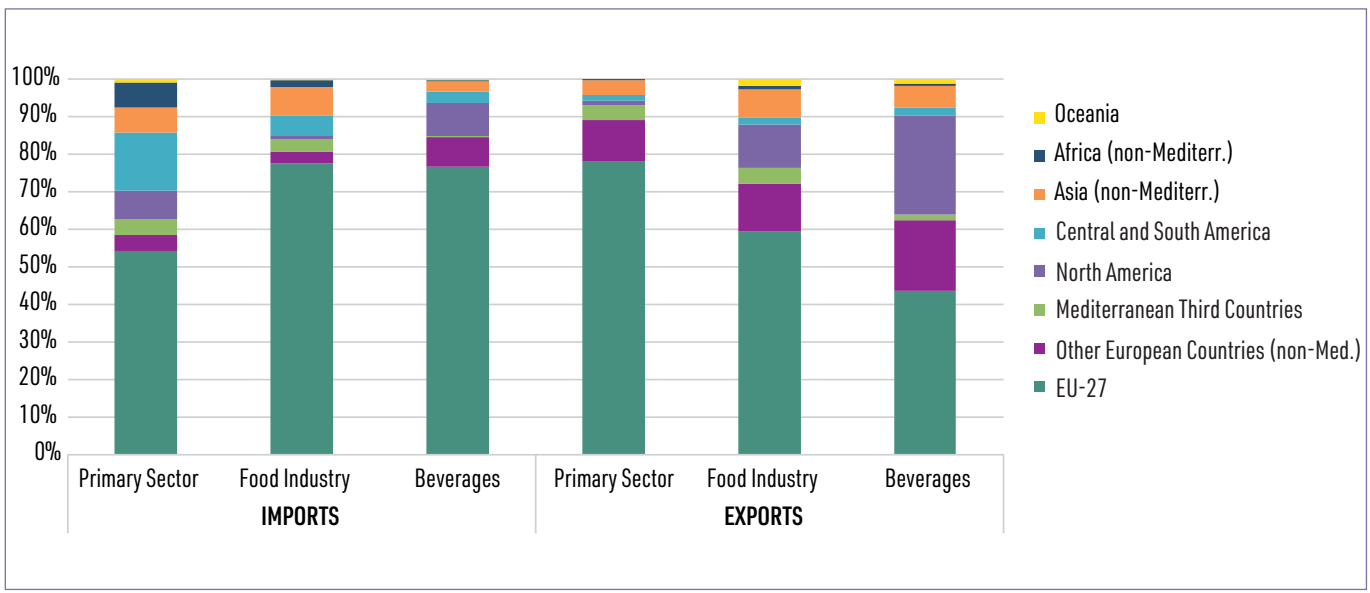
Source: CREA elaborations based on ISTAT data.

2.2 Geographical distribution by sector

Figure 2.9 shows that, in 2025, the geographical structure of Italian agri-food trade confirmed the central role of the European Union. The EU was both the main destination market for exports and, above all, the principal supply area for the national agri-food system. Nevertheless, significant differences emerged across sectors, together with increasing geographical diversification, particularly on the export side. For imports, the European Union was the leading trading partner in every sector. Approximately 54% of primary-sector imports, over 77% of food-industry imports and almost 77% of beverage imports originated in Member States. These figures highlight the strong integration of European agri-food value chains and the importance of the single market as Italy's principal source of supply. Alongside the EU, South America and Asia also played significant roles. Central and South America accounted for approximately 15% of primary-sector imports and more than 5% of food-industry imports, confirming their function as strategic suppliers of raw materials. Asia accounted for approximately 7% of total imports in both the primary sector and the food industry, mainly through supplies of green coffee, vegetable oils, fish products and other raw materials used by the processing industry.

On the export side, the European Union remained the principal market for all sectors, absorbing approximately 59% of Italian agri-food exports and more than 43% of beverage exports. Compared with imports, however, exports were more geographically diversified. North America remained the leading non-European market, accounting for over 26% of beverage exports and approximately

Figure 2.9 Geographical distribution of Italian agri-food trade by sector, 2025 (percentage share)



Source: CREA elaborations based on ISTAT data.

12% of food-industry exports, demonstrating the strong competitiveness of flagship Made in Italy products such as wines, sparkling wines, cheese and processed foods. Non-Mediterranean Asia was also an important destination, absorbing approximately 6% of beverage exports and more than 7% of food-industry exports. South America and Oceania had smaller shares, representing niche markets that nevertheless offer promising development opportunities for certain specialised products.

Overall, Figure 2.9 illustrates the importance of the European Union and South America for supplying the Italian agri-food system, while showing a more diversified geographical distribution on the export side. This configuration reflects Italy's traditional specialisation model, based on exports of higher-value-added processed products, which also requires imports of raw materials and intermediate goods from European and non-European markets. In particular, beverages and the food industry maintain a significant presence in non-European markets, contributing to the international competitiveness of Italian agri-food products.

The tables at the end of this section (2.6 and subsequent tables) provide further detail on the geographical composition of Italian agri-food trade, showing, for each macro-area, the share of the different sectors, trade trends and the main products exported and imported.

In 2025, the European Union remains the main trading partner for Italy's agri-food sector, absorbing exports worth €42.9 billion and supplying imports worth over €50.3 billion. The area accounts for 59.5% of national agri-food exports and almost 70% of imports, confirming the central role of the European single market for Italy's production system. Trade growth is sustained on both the export side (+8.1%) and the import side (+9.3%), with particularly strong growth in the primary sector, whose imports increase by 16.3% compared with 2024. This trend highlights the strengthening of raw material supplies from EU partners. Particularly significant is the large share of the food industry, which accounts for approximately 68% of exports and over 67% of agri-food imports traded with the area. This confirms the high degree of integration of European production chains, within which intermediate, semi-processed and processed products circulate intensively among Member States. The main exported products include cocoa-based confectionery products, roasted coffee, biscuits, preserved tomatoes, pasta and fresh cheeses. Particularly noteworthy is the increase in the value of exports of confectionery products (+20.6%), roasted coffee (+24%), and Grana Padano and Parmigiano Reggiano (+17.4%), also influenced by the rise in average unit export values. On the import side, confectionery products (+33.4%), especially semi-processed cocoa products, processed fish, cattle for breeding (+74.7%), extra virgin olive oil, and beef and pork play an important role. The increase in imports of live cattle is one of the most dynamic developments in the overall European trade picture. Despite the high value of exports, Italy's normalised trade balance with the EU remains negative (-8%), reflecting the higher value of purchases compared with sales and the deep integration of EU agri-food supply chains.

North America remains one of the main destination markets for higher value-added Italian agri-food products. The top eight products account for almost 47% of Italian agri-food exports to the area, highlighting a strong concentration in products emblematic of Made in Italy. The North American market is particularly important for certain product categories. Exports of packaged PDO white wines to the area reach €467.8 million and account for 40.6% of Italy's total exports of the product, indicating this sector's strong dependence on North American demand. Similar importance is observed for mineral waters, for which North America absorbs 43.2% of Italian exports, and for packaged PDO red and rosé wines, which send 37.8% of their foreign sales to the area. Extra virgin olive oil also continues to play a significant role, with exports worth €678.6 million and a 32.8% share of the product's total exports, despite recording a 24.9% decline in 2025 compared with the previous year. Products showing particularly positive trends include Grana Padano and Parmigiano Reggiano (+20.6%), non-decaffeinated roasted coffee (+24.1%) and mineral waters (+7%), confirming the ability of certain certified products with a strong identity to strengthen their presence

in the North American market. By contrast, in addition to olive oil, significant declines are observed for PDO red and rosé wines (-12.3%), meat extracts, soups and sauces (-15.3%), PDO white wines (-5.7%) and PDO sparkling wines (-4%). These trends are naturally influenced by tariff tensions between the United States and the European Union, which have affected agri-food trade between Italy and the United States and are examined in greater detail in this chapter.

Agri-food trade with South America displays a profoundly different configuration from that observed with North America. Italian exports amounted to approximately EUR 808 million, while imports reached EUR 5.6 billion, generating a strongly negative normalised trade balance (-74.7%). The area primarily serves as a supplier of essential raw materials to the Italian agri-food system. Imports were concentrated in a small number of strategic products, including green coffee, soybeans, oilcake and animal feed, cocoa, beef and fish products. Growth in certain commodities was particularly significant. Imports of cocoa and green coffee increased in value by 95.7% and 39.3%, respectively, affected by the above-mentioned price increases, although cocoa volumes also rose by more than 50%. Purchases of frozen boneless beef also increased (+43.8% in value and +29.4% in quantity). These trends highlight the growing importance of South America in Italy's supply of raw materials for industrial processing. Italian exports to the area remained relatively limited and consisted mainly of pasta, apples, preserved tomatoes, confectionery, roasted coffee and extra virgin olive oil. Here too, the traditional specialisation model of the Italian agri-food sector is evident, based on exports of high-value-added processed products. Import growth (+21.7%) was one of the most important developments in Italian agri-food trade in 2025 and confirms the growing strategic importance of Latin America as a supply area. This importance is even more pronounced in light of the EU-Mercosur agreement, which is examined in Chapter 6 of this edition.

Non-Mediterranean Asia represents an area of interest for the Italian agri-food sector. In 2025, exports reach €4.85 billion, while imports amount to approximately €5.2 billion. The normalised trade balance is close to equilibrium (-3.4%), reflecting a relatively balanced trade structure compared with other geographical areas. Exports are driven primarily by typical Italian agri-food products: biscuits and pastries, cocoa-based confectionery products, extra virgin olive oil, pasta, preserved tomatoes and roasted coffee. These products benefit from the spread of Western food consumption patterns. Imports, by contrast, are dominated by raw materials and intermediate products, including green coffee, vegetable oils, crustaceans, fish products, rice and substances used in the food industry. Despite export growth (+2%), the pace of expansion appears slower than in previous years. This trend suggests a consolidation phase for Italy's presence in the area, in a context characterised by more complex international competition and a partial slowdown in demand, especially in some countries in the region. Looking ahead, non-Mediterranean Asia may continue to offer development opportunities for the Italian agri-food sector, particularly in segments linked to quality, product recognition and the diversification of destination markets.

Although it accounts for a limited share of Italy's agri-food trade, Oceania continues to play an interesting commercial role. In 2025, Italian exports exceed €1 billion, compared with imports of approximately €362 million. The area records a positive normalised trade balance (+47.3%), indicating a favourable competitive position for Italy. Exports are highly concentrated in traditional products of the Italian food industry, such as preserved tomatoes, pasta, confectionery products, biscuits, extra virgin olive oil and roasted coffee. These products enjoy stable demand in the Australian and New Zealand markets, which are characterised by high income levels and a strong presence of consumers interested in quality food products. Imports mainly consist of wool (up 12.6% compared with 2024), processed fish, kiwifruit (+17.1%), durum wheat (+150.3%), beef and seeds, confirming Oceania's role as an exporter of agricultural, fisheries and livestock products. Overall, the area displays a trade pattern complementary to Italy's, based

on exports of agricultural raw materials and imports of processed products, thereby helping Italy maintain a trade surplus.

A comparative analysis of the main geographical areas shows that Italy's agri-food trade is structured around differentiated relationships linked to the economic function performed by each market. The European Union remains the main area of trade integration, accounting for approximately 60% of Italian agri-food exports and 70% of imports. Trade with the area involves both agricultural and processed products, reflecting the integration of European supply chains and Italy's role as both an importer and an exporter within the single market.

Outside the EU, North America remains an important market for higher value-added Italian agri-food products: although it accounts for only a limited share of imports, it absorbs a significant proportion of exports and contributes to Italy's positive trade balance. South America, by contrast, primarily serves as a source of supply, with imports concentrated in raw materials. Non-Mediterranean Asia has a more balanced position, acting both as a destination market for processed products and as a source of raw materials and intermediate products. Oceania, although accounting for a limited share of overall trade, maintains a positive balance for Italy and a trade structure based mainly on exports of processed products.

Overall, the picture confirms a specialisation model in which the Italian agri-food system adds value–also through processing–to raw materials partly sourced from abroad, supplying international markets with higher value-added food products. The geographical diversification of destination markets is a favourable factor, while reliance on certain external sources of supply highlights the need to continue monitoring developments in global agri-food supply chains.

In-depth analysis Italy's agri-food trade with the United States

In 2025, the new US trade policy affected Italy's agri-food exports to a market that is strategic for many domestic products.

Italian agri-food exports to the United States amounted to €7.55 billion in 2025, down 4.2% compared with 2024. This result interrupted the upward trend that had characterised the previous period.

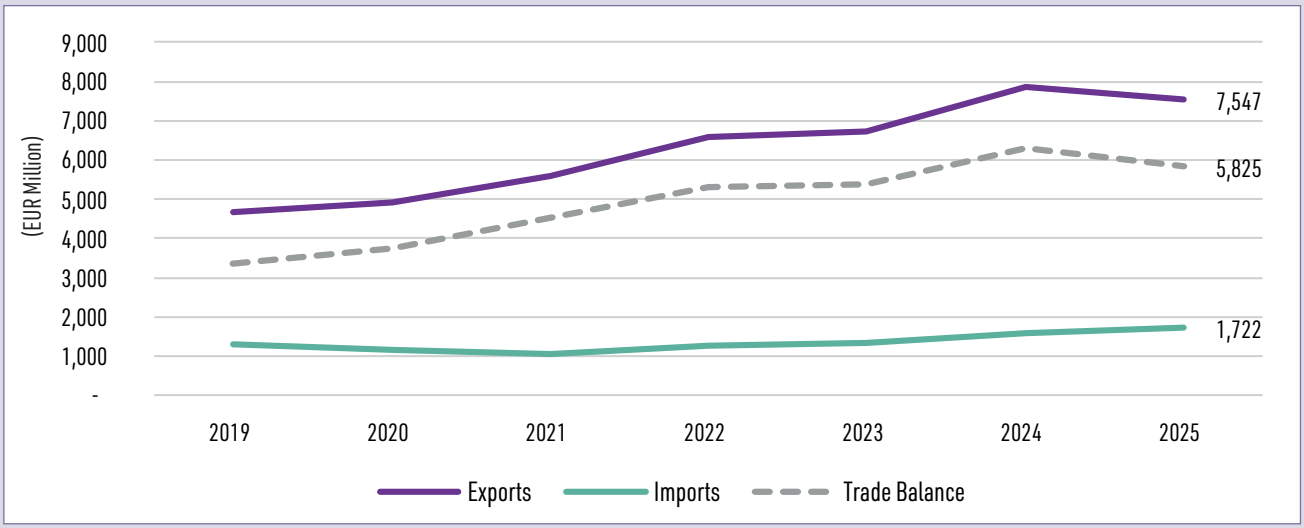
Despite the decline in export value, total volumes increased by 2.8%, reaching 2.35 million tonnes. The divergence between value and volume points to a decrease in average unit values, concentrated mainly in the second half of the year.

This trend can be attributed to several factors: a shift in trade flows towards products with a lower average price; producers' partial absorption of price increases faced by US consumers; purchasing strategies adopted by importers to bring orders forward amid tariff-related uncertainty; and the easing of price pressures for certain products following the sharp increases recorded in previous years.

Despite the decline in value in 2025, the US market nevertheless confirms its strategic role for the Italian agri-food sector. Between 2019 and 2024, the value of exports increased from €4.66 billion to €7.88 billion, before contracting in 2025. Italy's agri-food trade balance with the United States remained strongly positive in 2025, at €5.83 billion, although it decreased from €6.30 billion in 2024 as a result of the combined decline in exports and increase in imports. The balance in 2025 nevertheless remained well above the level recorded in 2023 and in previous years.

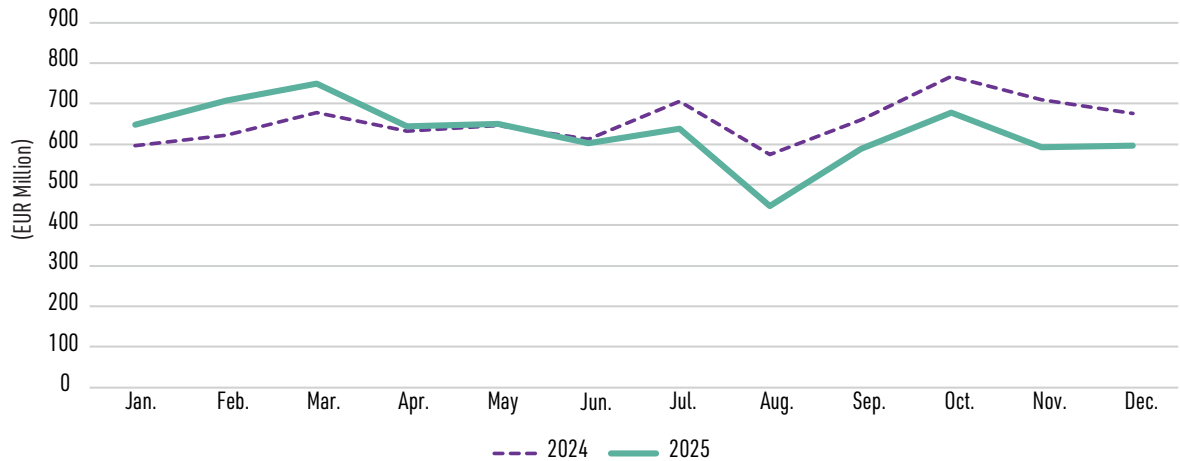
The monthly trend reveals a reversal during the year. In the first five months of 2025, sales to the United States exceeded 2024 levels, with particularly strong

Figure 2.10 Trends in the value of Italy's agri-food trade with the United States, 2019-2025



Source: CREA elaborations based on ISTAT data.

Figure 2.11. Monthly trend in the value of Italy's agri-food exports to the United States, 2024 and 2025



Source: CREA elaborations based on ISTAT data.

year-on-year increases in February (+13.7%) and March (+10.7%). From June onwards, the trend turned negative and the decline intensified in the second half of the year: between July and December, export values fell in every month compared with the previous year, with the sharpest decreases in August (-21.9%) and November (-16.5%).

Following the tariff increase, the value of Italian agri-food exports to the United States contracted by 13.4% year on year in the second half of 2025, while quantities declined by only 1.1%, highlighting the above-mentioned decrease in average unit export values.

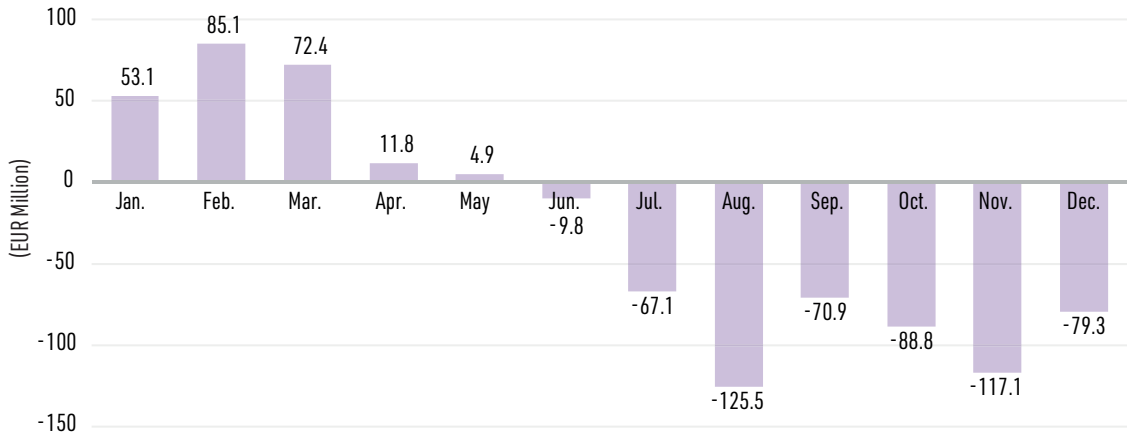
At product level, the overall decline was driven primarily by extra virgin olive oil, whose export value fell from EUR 788 million to EUR 568.4 million (-27.9%) between 2024 and 2025, with a particularly pronounced decrease in the second half (-49.6% in value and -27% in quantity). The next largest negative contributions over 2025 came from sauces and condiments (-16.7%), packaged PDO red and rosé wines (-12.9%), packaged PDO white wines (-6.2%), liqueurs and spirits (-14.9%), and preserved and peeled tomatoes (-8.1%). For all these sectors, the full application of higher tariffs in the second half of the year caused exports to contract, in several cases, including PDO wines and liqueurs, after values had risen at the beginning of the year.

Positive developments were nevertheless recorded in 2025 compared with 2024. US sales of Grana Padano and Parmigiano Reggiano rose by 21% in value to EUR 306.2 million, while quantities remained broadly stable. Growth continued in the second half (+21.5% in value), indicating the resilience of the hard PDO cheese segment in the US market.

Significant increases in 2025 were also recorded for exports of cocoa-based confectionery (+28.4%), non-decaffeinated roasted coffee (+26.9%), bakery products (+10.8%) and mineral waters (+7%), although mineral waters showed a slight decline in value in the second half despite higher volumes.

Overall, the data indicate a slowdown in Italian

Figure 2.12. Year-on-year monthly change in the value of Italy's agri-food exports to the United States, 2025/2024



Source: CREA elaborations based on ISTAT data.

Table 2.4 Italy's agri-food exports to the United States, main products, 2024 and 2025 (values in EUR million)

Product	Value (€ Million)		Percentage Change in Value, 2025/24	Percentage Change in Value, Second Half, 2025/24
	2025	2024		
Extra Virgin Olive Oil	568.4	788.0	-27.9%	-49.6%
Sparkling Wines (PDO)	506.5	521.6	-2.9%	-16.4%
Packaged Red and Rosé Wines (PDO)	505.8	580.9	-12.9%	-29.4%
Non-Egg, Unfilled Pasta	490.9	481.8	1.9%	-6.3%
Meat Extracts, Soups and Sauces	437.9	525.7	-16.7%	-19.0%
Packaged White Wines (PDO)	389.0	414.9	-6.2%	-21.7%
Mineral Water	387.9	362.6	7.0%	-2.9%
Grana Padano and Parmigiano Reggiano	306.2	253.1	21.0%	21.5%
Biscuits and Pastry Products	243.2	259.8	-6.4%	-14.0%
Bakery Products	212.6	192.0	10.8%	0.4%
Preserved and Peeled Tomatoes	203.7	221.7	-8.1%	-8.7%
Dry-Cured Hams and Other Boneless Pork*	193.5	195.3	-0.9%	-4.4%
Liqueurs and Spirits	195.3	229.5	-14.9%	-31.8%
Cocoa-Based Products	178.0	138.6	28.4%	13.4%
Roasted Coffee, Not Decaffeinated	167.0	131.7	26.9%	5.6%
TOTAL AGRI-FOOD PRODUCTS	**7,547.1**	**7,878.3**	**-4.2%**	**-13.4%**

**Dried or smoked, salted or in brine (excluding shoulders, sausages and salami).*

Source: CREA elaborations based on ISTAT data.

agri-food exports to the United States in 2025, concentrated in the second half of the year and particularly marked for certain Made in Italy products. The resilience of some high-value-added supply chains, especially PDO cheeses, confectionery and roasted coffee, partly mitigated the negative impact recorded in oil, wine and certain food preparations.

Monitoring exports to the US market in the coming months will make it possible to assess whether, and to what extent, the trends observed for the various products are confirmed, together with the changing product composition of flows and the decline in average unit value despite the greater resilience of export volumes.

Table 2.5 Italy's agri-food exports to the United States, main products, 2024 and 2025 (quantities in thousand tonnes)

Product	Quantity (Thousand Tonnes)		Percentage Change in Quantity, 2025/24	Percentage Change in Quantity, Second Half, 2025/24
	2025	2024		
Extra Virgin Olive Oil	77.7	78.7	-1.3%	-27.0%
Sparkling Wines (PDO)	112.6	112.3	0.3%	-10.9%
Packaged Red and Rosé Wines (PDO)	52.0	56.8	-8.4%	-18.2%
Non-Egg, Unfilled Pasta	293.3	278.5	5.3%	-1.8%
Meat Extracts, Soups and Sauces	136.0	161.3	-15.7%	-15.6%
Packaged White Wines (PDO)	90.2	95.9	-5.9%	-13.6%
Mineral Water	490.0	428.9	14.3%	12.6%
Grana Padano and Parmigiano Reggiano	19.9	19.9	-0.1%	0.4%
Biscuits and Pastry Products	37.9	37.8	0.3%	2.6%
Bakery Products	41.7	36.2	15.3%	6.0%
Preserved and Peeled Tomatoes	163.3	169.6	-3.7%	-6.1%
Dry-Cured Hams and Other Boneless Pork*	13.2	12.9	2.5%	4.6%
Liqueurs and Spirits	28.3	30.1	-5.8%	-19.4%
Cocoa-Based Products	15.7	14.1	10.9%	5.4%
Roasted Coffee, Not Decaffeinated	15.0	12.9	16.1%	1.8%
TOTAL AGRI-FOOD PRODUCTS	**2,350.1**	**2,285.5**	**2.8%**	**-1.1%**

**Dried or smoked, salted or in brine (excluding shoulders, sausages and salami).*

Source: CREA elaborations based on ISTAT data.

Table 2.6 Italy's Agri-Food Trade with EU-27

Agri-Food (AF) Trade (EUR Million)					Main Agri-Food Export and Import Products				
	AF	PS	FI	Be		VALUE 2025 (EUR Million)	% CHANGE 2025/24	PRODUCT SHARE %	AREA SHARE %
Italy's Exports					**Italy's Exports**				
2025 Value	42,856.2	7,909.9	29,337.0	5,251.3	Cocoa-Based Products	2,189.4	20.6	5.1	60.3
Percentage Change, 2025/2024	8.1	10.1	8.4	0.0	Roasted Coffee, Not Decaffeinated	1,981.3	24.1	4.6	65.3
Percentage Change, 2024/2023	5.9	5.5	7.1	0.6	Biscuits and Pastry Products	1,544.1	2.0	3.6	53.8
Share of Total Italian Exports (%)	59.5	78.3	59.2	43.7	Preserved and Peeled Tomatoes	1,404.0	-7.1	3.3	50.7
					Non-Egg, Unfilled Pasta	1,344.3	-1.7	3.1	46.7
					Curd and Other Fresh Cheeses	1,240.8	13.2	2.9	76.4
					Bakery Products	1,012.4	10.6	2.4	59.4
Italy's Imports					Grana Padano and Parmigiano Reggiano	1,012.2	17.4	2.4	56.6
2025 Value	50,322.5	13,769.3	33,916.5	2,228.8	Other Products	31,127.8	8.1	72.6	60.2
Percentage Change, 2025/2024	9.3	16.3	8.8	-1.1					
Percentage Change, 2024/2023	2.5	0.8	5.2	0.0	**Italy's Imports**				
Share of Total Italian Imports (%)	69.5	54.4	77.5	76.7	Cocoa-Based Products	2,284.7	33.4	4.5	85.9
					Processed Fish	2,040.8	5.8	4.1	63.7
					Cattle for Breeding	1,973.7	74.7	3.9	100.0
					Extra Virgin Olive Oil	1,916.2	-6.3	3.8	89.0
Normalised Trade Balance (%)					Fresh or Chilled Semi-Processed Pork	1,529.5	-2.8	3.0	99.8
2025	-8.0	-27.0	-7.2	40.4	Beef: Fresh or Chilled Semi-Processed Cuts	1,400.6	20.3	2.8	98.9
2024	-7.5	-24.5	-7.1	39.9	Seed Oils and Vegetable Fats	1,272.9	58.4	2.5	50.4
2023	-9.0	-26.6	-8.0	39.7	Semi-Hard Cheeses	1,115.9	6.7	2.2	96.5
					Other Products	36,788.3	9.3	73.1	65.9

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.7 Italy's Agri-Food Trade with Other European Countries (non-Mediterranean)

Agri-Food (AF) Trade (EUR Million)				
	AF	PS	FI	Be
Italy's Exports				
2025 Value	9,572.4	1,107.6	6,196.2	2,268.1
Percentage Change, 2025/2024	4.3	4.9	8.1	-5.0
Percentage Change, 2024/2023	8.1	7.8	8.6	7.1
Share of Total Italian Exports (%)	13.3	11.0	12.5	18.9
Italy's Imports				
2025 Value	2,570.9	1,018.3	1,320.7	230.7
Percentage Change, 2025/2024	6.9	9.9	9.1	-13.0
Percentage Change, 2024/2023	-9.4	-27.9	9.6	1.2
Share of Total Italian Imports (%)	3.5	4.0	3.0	7.9
Normalised Trade Balance (%)				
2025	57.7	4.2	64.9	81.5
2024	58.5	6.5	65.1	80.0
2023	52.4	-13.5	65.4	79.0

Main Agri-Food Export and Import Products				
	VALUE 2025 (EUR Million)	**% CHANGE 2025/24**	**PRODUCT SHARE %**	**AREA SHARE %**
Italy's Exports				
Other PDO Sparkling Wines	582.2	-2.1	6.1	31.2
Preserved and Peeled Tomatoes	496.9	-5.4	5.2	17.9
Cocoa-Based Products	471.1	39.1	4.9	13.0
Non-Egg, Unfilled Pasta	428.1	-4.0	4.5	14.9
Roasted Coffee, Not Decaffeinated	384.0	25.5	4.0	12.7
Biscuits and Pastry Products	330.2	9.6	3.4	11.5
Packaged PDO Red and Rosé Wines	323.4	-5.8	3.4	18.0
Bakery Products	294.9	12.9	3.1	17.3
Other Products	6,261.8	4.3	65.4	12.2
Italy's Imports				
Maize	508.7	10.9	19.8	33.0
Seed Oils and Vegetable Fats	417.2	10.1	16.2	16.5
Common Wheat and Spelt	174.2	19.1	6.8	12.1
Cocoa-Based Products	120.6	49.7	4.7	4.5
Other Spirits	116.8	-20.0	4.5	19.5
Durum Wheat	102.5	-7.7	4.0	11.4
Oilseed Cakes and Animal Feed	69.1	-40.2	2.7	4.0
Whisky	66.4	-11.7	2.6	29.8
Other Products	995.3	6.9	38.7	1.6

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.8 Italy's Agri-Food Trade with European Mediterranean Third Countries

Agri-Food (AF) Trade (EUR Million)				
	AF	PS	FI	Be
Italy's Exports				
2025 Value	672.1	65.4	534.8	72.0
Percentage Change, 2025/2024	10.1	19.5	12.0	-7.8
Percentage Change, 2024/2023	43.2	42.0	46.9	24.6
Share of Total Italian Exports (%)	0.9	0.6	1.1	0.6
Italy's Imports				
2025 Value	171.3	61.8	106.7	2.8
Percentage Change, 2025/2024	-4.8	10.5	-11.3	-25.9
Percentage Change, 2024/2023	-8.8	-13.7	-7.2	24.6
Share of Total Italian Imports (%)	0.2	0.2	0.2	0.1
Normalised Trade Balance (%)				
2025	59.4	2.8	66.7	92.6
2024	54.5	-1.1	59.8	90.8
2023	36.7	-25.5	43.0	90.8

Main Agri-Food Export and Import Products	VALUE 2025 (EUR Million)	% CHANGE 2025/24	PRODUCT SHARE %	AREA SHARE %
Italy's Exports				
Beef: Fresh or Chilled Semi-Processed Cuts	72.6	12.6	10.8	16.3
Roasted Coffee, Not Decaffeinated	70.3	34.3	10.5	2.3
Oilseed Cakes and Animal Feed	31.1	-2.1	4.6	2.7
Processed Fish	26.6	2.1	4.0	5.2
Bakery Products	23.9	5.7	3.6	1.4
Non-Egg, Unfilled Pasta	22.8	3.6	3.4	0.8
Malt Beer	21.4	9.8	3.2	8.7
Biscuits and Pastry Products	21.4	24.8	3.2	0.7
Other Products	382.0	10.1	56.8	0.6
Italy's Imports				
Processed Fish	50.8	-3.0	29.6	1.6
Wood, Cork, and Bamboo	27.7	20.9	16.2	8.5
Fresh or Chilled Gilthead Sea Bream	16.9	18.4	9.9	6.0
Frozen Crustaceans and Molluscs	10.3	-0.1	6.0	0.5
Leather and Hides	7.8	14.2	4.6	1.1
Other Preserved or Prepared Pulses and Veget.	6.8	18.7	3.9	1.2
Bakery Products	6.7	1.1	3.9	0.9
Yeasts	4.1	-5.1	2.4	4.3
Other Products	40.3	-4.8	23.5	0.1

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.9 Italy's Agri-Food Trade with Asian Mediterranean Third Countries

Agri-Food (AF) Trade (EUR Million)				
	AF	PS	FI	Be
Italy's Exports				
2025 Value	1,156.7	129.3	930.9	96.5
Percentage Change, 2025/2024	12.5	11.9	13.3	5.7
Percentage Change, 2024/2023	14.8	16.8	17.2	-4.3
Share of Total Italian Exports (%)	1.6	1.3	1.9	0.8
Italy's Imports				
2025 Value	1,231.6	766.7	462.8	1.8
Percentage Change, 2025/2024	-2.9	-2.7	-2.2	-73.6
Percentage Change, 2024/2023	9.4	4.3	21.2	-50.6
Share of Total Italian Imports (%)	1.7	3.0	1.1	0.1
Normalised Trade Balance (%)				
2025	-3.1	-71.1	33.6	96.4
2024	-10.4	-74.4	26.9	86.3
2023	-12.8	-76.8	28.5	75.1

Main Agri-Food Export and Import Products				
	VALUE 2025 (EUR Million)	**% CHANGE 2025/24**	**PRODUCT SHARE %**	**AREA SHARE %**
Italy's Exports				
Cocoa-Based Products	123.6	31.5	10.7	3.4
Biscuits and Pastry Products	94.6	14.4	8.2	3.3
Roasted Coffee, Not Decaffeinated	74.0	32.2	6.4	2.4
Apples	64.2	37.2	5.6	5.4
Oilseed Cakes and Animal Feed	59.6	23.7	5.2	5.2
Non-Egg, Unfilled Pasta	59.3	-4.7	5.1	2.1
Dog and Cat Food	48.4	16.3	4.2	6.8
Beef: Fresh or Chilled Semi-Processed Cuts	33.7	-46.9	2.9	7.6
Other Products	599.3	12.5	51.8	1.1
Italy's Imports				
Hazelnuts	258.1	-6.3	21.0	41.9
Prepared or Preserved Fruit	145.0	70.9	11.8	24.1
Processed Fish	127.5	8.9	10.3	4.0
Pistachios	89.0	62.7	7.2	15.6
Fresh or Chilled Gilthead Sea Bream	86.6	41.8	7.0	30.8
Durum Wheat	56.4	-50.7	4.6	6.3
Fresh or Chilled European Sea Bass	41.8	-1.1	3.4	16.8
Dried Grapes	37.3	-6.4	3.0	58.3
Other Products	390.0	-2.9	31.7	0.6

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.10 Italy's Agri-Food Trade with African Mediterranean Third Countries

Agri-Food (AF) Trade (EUR Million)				
	AF	PS	FI	Be
Italy's Exports				
2025 Value	787.4	178.3	593.5	15.6
Percentage Change, 2025/2024	9.6	37.8	2.9	25.1
Percentage Change, 2024/2023	1.3	0.0	1.2	24.2
Share of Total Italian Exports (%)	1.1	1.8	1.2	0.1
Italy's Imports				
2025 Value	1,222.0	241.6	973.2	6.9
Percentage Change, 2025/2024	-6.3	16.2	-10.7	7.8
Percentage Change, 2024/2023	18.7	8.1	21.7	-41.1
Share of Total Italian Imports (%)	1.7	1.0	2.2	0.2
Normalised Trade Balance (%)				
2025	-21.6	-15.1	-24.2	38.4
2024	-29.0	-23.3	-30.8	31.9
2023	-21.6	-19.6	-22.2	-4.2

Main Agri-Food Export and Import Products				
	VALUE 2025 (EUR Million)	**% CHANGE 2025/24**	**PRODUCT SHARE %**	**AREA SHARE %**
Italy's Exports				
Seed Oils and Vegetable Fats	135.6	31.2	17.2	16.6
Apples	84.8	148.1	10.8	7.1
Cocoa-Based Products	66.3	45.7	8.4	1.8
Preserved and Peeled Tomatoes	60.7	-43.9	7.7	2.2
Oilseed Cakes and Animal Feed	53.3	1.6	6.8	4.6
Biscuits and Pastry Products	46.1	4.3	5.9	1.6
Roasted Coffee, Not Decaffeinated	42.1	9.2	5.3	1.4
Live Fish (Excluding Ornamental Fish)	28.5	66.1	3.6	45.3
Other Products	269.8	9.6	34.3	0.5
Italy's Imports				
Frozen Crustaceans and Molluscs	294.2	-0.3	24.1	14.6
Extra Virgin Olive Oil	229.2	-39.1	18.8	10.6
Processed Fish	119.6	0.5	9.8	3.7
Semi-Processed Vegetables and Pulses	53.0	-12.0	4.3	40.7
Other Preserved or Prepared Pulses and Veget.	35.9	4.1	2.9	6.5
Oilseed Cakes and Animal Feed	35.5	33.6	2.9	2.0
Potatoes	30.4	-26.4	2.5	11.6
Preserved and Peeled Tomatoes	29.3	65.4	2.4	11.6
Other Products	395.0	-6.3	32.3	0.6

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.11 Italy's Agri-Food Trade with North America

Agri-Food (AF) Trade (EUR Million)				
	AF	PS	FI	Be
Italy's Exports				
2025 Value	9,028.3	143.0	5,732.3	3,153.0
Percentage Change, 2025/2024	-2.9	-0.6	-0.6	-6.8
Percentage Change, 2024/2023	16.7	2.7	20.6	11.4
Share of Total Italian Exports (%)	12.5	1.4	11.6	26.2
Italy's Imports				
2025 Value	2,584.4	1,970.0	366.8	247.4
Percentage Change, 2025/2024	14.2	18.0	8.8	-3.5
Percentage Change, 2024/2023	5.0	2.5	25.6	-0.6
Share of Total Italian Imports (%)	3.6	7.8	0.8	8.5
Normalised Trade Balance (%)				
2025	55.5	-86.5	88.0	85.5
2024	60.8	-84.1	88.9	85.9
2023	57.4	-84.1	89.4	84.3

Main Agri-Food Export and Import Products	VALUE 2025 (EUR Million)	% CHANGE 2025/24	PRODUCT SHARE %	AREA SHARE %
Italy's Exports				
Extra Virgin Olive Oil	678.6	-24.9	7.5	32.8
Packaged PDO Red and Rosé Wines	677.9	-12.3	7.5	37.8
Non-Egg, Unfilled Pasta	567.7	2.6	6.3	19.7
Other PDO Sparkling Wines	543.0	-4.0	6.0	29.1
Meat Extracts, Soups, and Sauces	471.4	-15.3	5.2	28.4
Packaged PDO White Wines	467.8	-5.7	5.2	40.6
Mineral Water	412.4	7.0	4.6	43.2
Grana Padano and Parmigiano Reggiano	399.4	20.6	4.4	22.3
Other Products	4,810.1	-2.9	53.3	8.3
Italy's Imports				
Durum Wheat	376.7	16.4	14.6	42.1
Soybeans	339.0	-8.0	13.1	36.1
Common Wheat and Spelt	272.3	2.5	10.5	19.0
Almonds	255.3	59.2	9.9	55.6
Pistachios	249.5	73.3	9.7	43.7
Other Spirits	162.7	-7.2	6.3	27.2
Cocoa-Based Products	114.3	52.3	4.4	4.3
Dried Common Beans (Excluding Seed)	86.1	16.6	3.3	47.4
Other Products	728.6	14.2	28.2	1.1

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.12 Italy's Agri-Food Trade with Central America

Agri-Food (AF) Trade (EUR Million)					Main Agri-Food Export and Import Products				
	AF	PS	FI	Be		VALUE 2025 (EUR Million)	% CHANGE 2025/24	PRODUCT SHARE %	AREA SHARE %
Italy's Exports					**Italy's Exports**				
2025 Value	434.5	48.7	257.0	128.9	Kiwifruit	31.5	38.1	7.2	4.5
Percentage Change, 2025/2024	3.0	24.1	0.8	0.8	Biscuits and Pastry Products	26.1	7.9	6.0	0.9
Percentage Change, 2024/2023	17.5	-3.1	25.8	10.3	Non-Egg, Unfilled Pasta	22.9	-20.7	5.3	0.8
Share of Total Italian Exports (%)	0.6	0.5	0.5	1.1	PGI Semi-Sparkling Wines	17.8	-23.5	4.1	13.1
					Extra Virgin Olive Oil	16.7	-34.7	3.9	0.8
					Other PDO Sparkling Wines	15.1	-2.4	3.5	0.8
					Seed Oils and Vegetable Fats	14.7	-3.3	3.4	1.8
Italy's Imports					Grana Padano and Parmigiano Reggiano	14.5	21.8	3.3	0.8
2025 Value	797.4	563.4	155.4	78.6	Other Products	275.1	3.0	63.3	0.5
Percentage Change, 2025/2024	7.9	16.9	-21.8	34.6					
Percentage Change, 2024/2023	-4.8	2.6	-10.1	-31.8	**Italy's Imports**				
Share of Total Italian Imports (%)	1.1	2.2	0.4	2.7	Green Coffee	257.8	42.0	32.3	7.1
					Bananas	134.5	-6.3	16.9	23.3
					Pineapples	111.5	3.2	14.0	89.3
					Other Spirits	78.5	35.0	9.8	13.1
Normalised Trade Balance (%)					Seed Oils and Vegetable Fats	59.7	-49.1	7.5	2.4
2025	-29.5	-84.1	24.6	24.2	Processed Fish	38.4	39.4	4.8	1.2
2024	-27.3	-84.9	12.3	37.3	Raw Cocoa	25.5	40.3	3.2	3.1
2023	-36.8	-84.1	-4.4	15.0	Sugar and Other Sugar-Producing Products	25.1	142.5	3.2	2.0
					Other Products	66.3	7.9	8.3	0.1

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.13 Italy's Agri-Food Trade with South America

Agri-Food (AF) Trade (EUR Million)				
	AF	PS	FI	Be
Italy's Exports				
2025 Value	808.0	108.8	574.0	125.2
Percentage Change, 2025/2024	2.7	-6.7	3.6	7.8
Percentage Change, 2024/2023	9.3	0.3	12.1	6.1
Share of Total Italian Exports (%)	1.1	1.1	1.2	1.0
Italy's Imports				
2025 Value	5,590.5	3,300.1	2,276.6	13.4
Percentage Change, 2025/2024	21.7	23.1	20.3	-32.3
Percentage Change, 2024/2023	5.0	9.2	-0.4	-0.4
Share of Total Italian Imports (%)	7.7	13.0	5.2	0.5
Normalised Trade Balance (%)				
2025	-74.7	-93.6	-59.7	80.6
2024	-70.8	-91.7	-54.7	70.8
2023	-71.7	-91.0	-58.7	69.2

Main Agri-Food Export and Import Products				
	VALUE 2025 (EUR Million)	% CHANGE 2025/24	PRODUCT SHARE %	AREA SHARE %
Italy's Exports				
Non-Egg, Unfilled Pasta	75.0	4.2	9.3	2.6
Apples	56.1	-23.5	6.9	4.7
Preserved and Peeled Tomatoes	52.6	5.0	6.5	1.9
Cocoa-Based Products	51.4	16.7	6.4	1.4
Roasted Coffee, Not Decaffeinated	48.1	34.2	6.0	1.6
Extra Virgin Olive Oil	39.3	-22.6	4.9	1.9
Biscuits and Pastry Products	32.8	9.8	4.1	1.1
Other Spirits	26.2	7.3	3.2	1.9
Other Products	426.4	2.7	52.8	0.8
Italy's Imports				
Green Coffee	1,422.7	39.3	25.4	39.0
Oilseed Cakes and Animal Feed	637.2	-4.2	11.4	36.7
Soybeans	453.2	-24.8	8.1	48.2
Frozen Crustaceans and Molluscs	440.9	7.6	7.9	21.9
Bananas	364.1	3.9	6.5	63.1
Frozen Boneless Beef	288.1	43.8	5.2	68.5
Raw Cocoa	239.0	95.7	4.3	28.9
Processed Fish	235.3	13.1	4.2	7.3
Other Products	1,509.9	21.7	27.0	2.6

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.14 Italy's Agri-Food Trade with Asia (non-Mediterranean)

Agri-Food (AF) Trade (EUR Million)					Main Agri-Food Export and Import Products				
	AF	PS	FI	Be		VALUE 2025 (EUR Million)	% CHANGE 2025/24	PRODUCT SHARE %	AREA SHARE %
Italy's Exports					Italy's Exports				
2025 Value	4,852.8	384.5	3,765.3	702.9	Biscuits and Pastry Products	412.8	12.0	8.5	14.4
Percentage Change, 2025/2024	2.0	9.8	2.1	-2.0	Cocoa-Based Products	317.3	1.2	6.5	8.7
Percentage Change, 2024/2023	7.3	-11.7	11.3	-0.5	Extra Virgin Olive Oil	278.5	1.3	5.7	13.5
Share of Total Italian Exports (%)	6.7	3.8	7.6	5.8	Non-Egg, Unfilled Pasta	259.6	-8.9	5.3	9.0
					Preserved and Peeled Tomatoes	233.9	-9.4	4.8	8.4
					Oilseed Cakes and Animal Feed	170.9	-7.0	3.5	14.9
					Roasted Coffee, Not Decaffeinated	157.8	0.3	3.3	5.2
Italy's Imports					Apples	139.5	26.9	2.9	11.7
2025 Value	5,193.2	1,712.9	3,306.5	77.3	Other Products	2,882.5	2.0	59.4	5.5
Percentage Change, 2025/2024	5.2	14.9	-1.5	-12.7					
Percentage Change, 2024/2023	3.7	17.3	-1.3	3.0	Italy's Imports				
Share of Total Italian Imports (%)	7.2	6.8	7.6	2.7	Green Coffee	922.7	25.5	17.8	25.3
					Seed Oils and Vegetable Fats	595.2	58.1	11.5	23.6
					Pectic Substances and Oils	394.7	-0.1	7.6	51.0
					Frozen Crustaceans and Molluscs	364.2	16.3	7.0	18.1
Normalised Trade Balance (%)					Animal Oils and Fats, for Industrial Use	335.0	77.5	6.5	68.3
2025	-3.4	-63.3	6.5	80.2	Processed Fish	259.7	22.4	5.0	8.1
2024	-1.9	-62.0	4.7	78.0	Wool and animal hair (Not Carded)	242.4	-6.0	4.7	67.1
2023	-3.6	-52.5	-1.3	78.7	Rice	209.8	-1.6	4.0	70.4
					Other Products	1,869.5	5.2	36.0	3.2

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.15 Italy's Agri-Food Trade with Africa (non-Mediterranean)

Agri-Food (AF) Trade (EUR Million)				
	AF	PS	FI	Be
Italy's Exports				
2025 Value	511.4	18.7	434.6	58.1
Percentage Change, 2025/2024	4.2	-1.1	2.5	21.5
Percentage Change, 2024/2023	-2.8	7.3	-1.9	-13.1
Share of Total Italian Exports (%)	0.7	0.2	0.9	0.5
Italy's Imports				
2025 Value	2,406.7	1,683.5	708.7	11.8
Percentage Change, 2025/2024	41.4	54.0	18.8	-5.0
Percentage Change, 2024/2023	13.9	20.1	2.7	232.6
Share of Total Italian Imports (%)	3.3	6.7	1.6	0.4
Normalised Trade Balance (%)				
2025	-64.9	-97.8	-24.0	66.2
2024	-55.2	-96.6	-16.9	58.7
2023	-49.5	-96.2	-14.7	87.3

Main Agri-Food Export and Import Products				
	VALUE 2025 (EUR Million)	**% CHANGE 2025/24**	**PRODUCT SHARE %**	**AREA SHARE %**
Italy's Exports				
Preserved and Peeled Tomatoes	80.5	-8.6	15.7	2.9
Cocoa-Based Products	38.4	21.6	7.5	1.1
Non-Egg, Unfilled Pasta	23.7	-12.6	4.6	0.8
Other Preserved or Prepared Pulses and Veget.	22.8	9.3	4.5	2.3
Semi-Processed Poultry Meat	19.5	24.0	3.8	5.2
Unprocessed Poultry Meat	17.9	0.7	3.5	12.1
Seed Oils and Vegetable Fats	16.8	-3.9	3.3	2.1
Biscuits and Pastry Products	13.9	8.6	2.7	0.5
Other Products	277.8	4.2	54.3	0.5
Italy's Imports				
Green Coffee	819.3	63.5	34.0	22.4
Raw Cocoa	502.1	63.9	20.9	60.7
Processed Fish	214.4	1.3	8.9	6.7
Frozen Crustaceans and Molluscs	135.7	28.2	5.6	6.7
Cocoa-Based Products	124.5	100.8	5.2	4.7
Seed Oils and Vegetable Fats	75.1	9.8	3.1	3.0
Forest Gums (Non-Food Use)	74.8	25.8	3.1	24.2
Oranges	56.8	53.4	2.4	35.8
Other Products	404.1	41.4	16.8	0.7

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

Table 2.16 Italy's Agri-Food Trade with Oceania

Agri-Food (AF) Trade (EUR Million)					Main Agri-Food Export and Import Products				
	AF	PS	FI	Be		VALUE 2025 (EUR Million)	% CHANGE 2025/24	PRODUCT SHARE %	AREA SHARE %
Italy's Exports					**Italy's Exports**				
2025 Value	1,010.8	5.3	860.3	145.2	Preserved and Peeled Tomatoes	124.5	-8.4	12.3	4.5
Percentage Change, 2025/2024	-0.4	-24.3	-0.6	2.1	Cocoa-Based Products	92.7	22.3	9.2	2.6
Percentage Change, 2024/2023	14.8	1.5	17.9	-0.6	Non-Egg, Unfilled Pasta	67.0	10.0	6.6	2.3
Share of Total Italian Exports (%)	1.4	0.1	1.7	1.2	Other Preserved or Prepared Pulses and Veget.	54.0	-8.9	5.3	5.4
					Biscuits and Pastry Products	51.3	-5.6	5.1	1.8
					Extra Virgin Olive Oil	40.8	-21.6	4.0	2.0
					Meat Extracts, Soups, and Sauces	38.5	-12.2	3.8	2.3
Italy's Imports					Roasted Coffee, Not Decaffeinated	34.9	30.1	3.5	1.2
2025 Value	361.9	212.3	144.2	5.0	Other Products	507.1	-0.4	50.2	1.0
Percentage Change, 2025/2024	-0.5	18.3	-18.8	-21.6					
Percentage Change, 2024/2023	-7.5	-10.9	-4.6	21.5	**Italy's Imports**				
Share of Total Italian Imports (%)	0.5	0.8	0.3	0.2	Wool and animal hair (Not Carded)	80.9	12.6	22.3	22.4
					Processed Fish	68.7	-37.5	19.0	2.1
					Kiwifruit	68.2	17.1	18.8	34.5
					Durum Wheat	34.9	150.3	9.6	3.9
Normalised Trade Balance (%)					Leather and Hides	19.2	11.2	5.3	2.7
2025	47.3	-95.1	71.3	93.3	Fresh Boneless Beef	17.3	52.0	4.8	2.1
2024	47.2	-92.5	65.9	91.4	Forage Seeds	11.2	117.3	3.1	9.4
2023	38.4	-93.3	59.5	92.9	Fresh or Frozen Offal	7.5	-21.6	2.1	3.8
					Other Products	54.1	-0.5	15.0	0.1

PS: Primary Sector; FI: Food Industry (excluding beverages); Be: Beverages.

Product share: share of the product in total Italian agri-food exports/imports to/from the geographical area under analysis.

Area share: share of the geographical area under analysis in total Italian exports/imports of the product concerned.

Source: CREA elaborations based on ISTAT data.

2.3 EU trade agreements for the agri-food sector

Developments in international trade continue to occupy a central place in the global economic debate. The increasing use of protectionist measures, trade tensions among the world's major economies and the reshaping of free trade agreements have contributed to a highly uncertain environment. In several cases, these developments have resulted in the introduction or threat of new customs tariffs, often substantial and implemented at very short notice, with potential repercussions for international supply chains and business costs. These factors have been compounded by the emergence of new and more stringent regulatory frameworks affecting global trade, particularly in sectors related to environmental sustainability and economic decarbonisation.

Over the past year, the European Union has been engaged in negotiating numerous strategically important trade agreements that may generate significant tariff reductions and other benefits for economic operators. Some agreements have been welcomed as major diplomatic and economic successes, while others have prompted intense debate and divergent positions among stakeholders. The resulting framework has seen some tariff measures suspended or reduced, while other uncertainties continue to weigh on international trade.

A particularly important development was the conclusion, on 27 January 2026, of negotiations on the free trade agreement between the European Union and India, described by the European Commission as the most extensive trade agreement ever concluded by the two parties. Once the signature and ratification process has been completed and the agreement has entered into force, it is expected to deliver substantial bilateral tariff reductions, simplify certain customs procedures and reduce administrative burdens for firms. According to Commission estimates, tariff reductions will cover 96.6% of EU goods exports to India and could generate annual customs-duty savings of approximately EUR 4 billion. However, several important issues remain unresolved, including the absence of provisions on access to Indian public procurement and the lack of an exemption for India from the Carbon Border Adjustment Mechanism (CBAM).

More specifically, following an initial chapter on general provisions, Chapter 2 of the agreement addresses trade in goods ('National Treatment and Market Access for Goods'). Under Article 2.1, the parties undertake to liberalise trade in goods progressively and reciprocally in accordance with the agreement. Measures include national treatment in taxation and domestic regulation and the progressive elimination or reduction of customs duties. The EU eliminates tariffs on more than 90% of tariff lines, corresponding to 91% of the value of the imports concerned, while India eliminates tariffs on 86% of tariff lines, equivalent to 93% of trade value. Both parties also partially liberalise a further significant number of products, bringing the overall coverage of trade liberalisation to 96.6% for India and 99.3% for the EU.

The main benefits for the European Union concern sectors including agri-food, chemicals, pharmaceuticals, machinery, medical devices, aeronautics and automotive; for India, benefits mainly concern fisheries, chemicals, textiles and clothing, footwear and pharmaceuticals. The agreement also provides specific safeguards to protect the European Union's most sensitive agricultural sectors.

Chapters 3-7 of the agreement regulate key operational aspects of EU-India trade. Rules of origin are intended to ensure that tariff preferences are reserved for products genuinely obtained or sufficiently processed in the two areas, thereby preventing trade circumvention. Customs and trade-facilitation provisions seek to simplify legitimate trade while ensuring effective controls on compliance with applicable rules. The agreement also addresses sanitary and phytosanitary measures (SPS), aiming to protect human, animal and plant health without creating unjustified barriers to trade, and tech-

nical barriers to trade (TBT), incorporating and developing commitments consistent with the World Trade Organization (WTO) framework. Finally, the possibility of using trade defence instruments, such as anti-dumping, countervailing and safeguard measures, is confirmed, while keeping these matters outside the ordinary dispute settlement mechanism.

Chapters 8-15 broaden the framework of commitments beyond trade in goods to include services, digital trade, intellectual property, competition, support for small and medium-sized enterprises, regulatory transparency, good regulatory practices and sustainable food systems. In particular, the services provisions build on the WTO General Agreement on Trade in Services (GATS), incorporating features typical of new-generation trade agreements, while the digital trade chapter seeks to facilitate online exchanges and promote an open and secure digital environment. For the agri-food sector, the chapter on sustainable food systems is particularly significant, introducing a framework designed to encourage practices consistent with the European Union's environmental and climate objectives.

Chapter 16 of the EU-India Free Trade Agreement, on Trade and Sustainable Development (TSD), establishes a framework of commitments integrating environmental, social and labour dimensions into trade relations between the parties. The provisions concern, in particular, implementation of the multilateral environmental agreements ratified by the parties, including the Paris Agreement, the Convention on Biological Diversity and CITES, as well as biodiversity protection, action against illegal, unreported and unregulated fishing, efforts to combat illegal logging, promotion of the circular economy, and support for the energy transition and renewable sources. In the social sphere, the agreement recalls the fundamental principles and rights of the International Labour Organization (ILO), including freedom of association, collective bargaining, elimination of forced and child labour, non-discrimination in employment and occupation, and occupational health and safety. The chapter also includes provisions on gender equality and on strengthening women's economic participation.

The TSD commitments form part of the agreement and are accompanied by a dedicated implementation and consultation mechanism between the parties. In the event of disagreements, the procedure provides for bilateral consultations, involvement of the Joint Committee and, ultimately, consultations at ministerial level. Unlike the ordinary dispute-settlement mechanism under Chapter 17, which provides for independent panels, binding reports and, in the event of non-compliance, possible compensatory measures or suspension of concessions, the sustainable-development provisions remain excluded from the general procedure. This represents a significant limitation, as it may limit the agreement's effective capacity to ensure compliance with the environmental and social commitments undertaken by the parties.

Overall, the EU-India agreement is of considerable strategic importance, both because of the economic scale of the markets involved and because of its potential contribution to diversifying the European Union's trading partners in an unstable international environment. Its principal strengths include broad tariff liberalisation, reduced administrative burdens for firms, stronger regulatory cooperation and the inclusion, at least formally, of environmental and social objectives. Key limitations concern the limited enforcement system for the TSD chapter, the exclusion of these provisions from the ordinary dispute-settlement mechanism, and the need to monitor compliance with environmental, labour and gender standards carefully, especially in a context of persistent regulatory and social vulnerabilities.

Table 2.17 EU trade agreements undergoing adoption or ratification

AGREEMENTS UNDER NEGOTIATION		
Partner	**Type of Agreement**	**Status of negotiations**
Malaysia	Free Trade Agreement (FTA)	Negotiations began in 2010, were suspended in 2012, and resumed in 2025.
Philippines	Free Trade Agreement (FTA)	Negotiations were launched in 2015.
Tajikistan	Enhanced Partnership and Cooperation Agreement (EPCA)	Negotiations were launched in February 2023.
Thailand	Free Trade Agreement (FTA)	Negotiations began in 2013, were suspended in 2014, and resumed in 2023.
United Arab Emirates	Free Trade Agreement (FTA)	Negotiations began in 1990, were suspended in 2008, and resumed in 2025.
CONCLUDED AGREEMENTS PENDING RATIFICATION		
Partner	**Type of Agreement**	**Status of Negotiations**
Australia	Free Trade Agreement (FTA)	Negotiations concluded in 2026.
India	Free Trade Agreement (FTA)	Negotiations concluded in 2026.
Indonesia	Comprehensive Economic Partnership Agreement (CEPA)	Negotiations concluded in 2025.
South Korea	Digital Trade Agreement	Pending signature.
Uzbekistan	Enhanced Partnership and Cooperation Agreement	Pending signature.
Kyrgyzstan	Enhanced Partnership and Cooperation Agreement	Pending signature.

Source: European Commission.

STRUCTURE AND TRENDS OF ITALY'S AGRI-FOOD TRADE BY PRODUCT CATEGORY



CHAPTER 3

MAIN AGRI-FOOD PRODUCTS IN ITALY'S FOREIGN TRADE

Percentage Change 2025/24

EXPORT	 Cocoa-based Products	 Roasted Coffee	 Pasta (Non-Egg, Unfilled)	 Biscuits and Pastry Products	 Preserved and Peeled Tomatoes
	+21.4%	+23.6%	-1.9%	+4.3%	-7.9%

IMPORT	 Green Coffee	 Processed Fish	 Cocoa-based Products	 Seed Oils and Vegetable Fats	 Extra Virgin Olive Oil
	+43.5%	+6%	+36.8%	+39.3%	-11.9%

3.1 Structure and dynamics by sector and product

Analysis of the sectoral structure of Italian agri-food imports in 2025 shows an increase in the share of the primary sector, which gained 2.4 percentage points and reached approximately 35% of total agri-food imports. At the same time, the combined share of the food industry and beverages declined by 1.9 percentage points, owing to decreases in the shares of both the food industry (-1.4 points) and beverages (-0.5 points). The food industry's share returned to its 2023 level in 2025, following the increase recorded in 2024.

The increase in the primary sector's share of agri-food imports was mainly attributable to major categories such as "cocoa, coffee, tea, and spices" (+1.5 percentage points) and live animals (+1.4 percentage points). Unlike cocoa and coffee, for which higher prices were the main driver of growth in value, live animals also recorded a marked increase in purchased volumes.

The dried fruit and nuts category also contributed to the primary sector's increased share, recording a rise of 0.6 percentage points.

As regards the food industry, the contraction in its share of agri-food imports was mainly attributable to fishery products and oils and fats, whose shares declined by 0.3 and 0.6 percentage points, respectively. In the beverage sector, the other alcoholic beverages category declined by 0.4 percentage points.

As regards exports, in 2025 the primary sector's share increased by 0.5 percentage points, while the beverage sector's share of total Italian agri-food exports decreased by as much as 1.4 percentage points. Within the sector, wine accounted for the most pronounced decline, losing 1.1 percentage points. By contrast, the food industry's share increased by 0.7 percentage points. Overall, exports of food-industry products and beverages continued to represent the predominant component of Italian agri-food exports, accounting for 85.5% of the total.

Looking at individual categories, the increase in the primary sector's share was partly attributable to the 0.4 percentage point rise in the share of fresh fruit. Within the food industry, both positive and negative changes in shares were observed. The declining shares of cereal derivatives and processed vegetables contrasted with growth in confectionery and dairy products, both of which increased by approximately 0.7 percentage points.

As noted above, wine was the main factor underlying the contraction in the beverage sector's share of agri-food exports, with a share 1.1 percentage points lower than in the previous year (Table 3.1). It should be emphasised that the contraction in sales to the United States accounted for only part of this trend, with an estimated effect of 0.2 percentage points. Therefore, although the United States is the key market for Italian exports of wine and beverages in general, trends in other major destination markets also contributed to the declining role of this sector in Italian agri-food exports.

Turning to trends at current prices, Italian agri-food trade grew as indicated above, with imports increasing by 10.1% and exports by 5.6%. Growth concerned both the primary sector and the food industry, whereas the value of beverage imports and exports declined by 2.5% and 2.7%, respectively (Table 3.2).

In terms of traded quantities, the overall trend was positive, with purchases increasing by 4.5% and exports by 3.8%. Once again, the beverage sector was the exception, recording a 3.7% decline in purchased quantities.

Examining imports in greater detail, the marked increase in the value of primary-sector imports (+18.2%) was driven mainly by live animals (+61.0%), "cocoa, coffee, tea, and spices" (+43.9%), and dried fruit and nuts (+38.3%), whose imports exceeded EUR 3.2 billion, EUR 4.6 billion, and EUR 2.3 billion, respectively, in 2025. As already noted, the increase in the value of live-animal imports was accompanied by strong growth in imported quantities, whereas the increase in value for "cocoa, coffee, tea, and spices" occurred against broadly stable quantities, highlighting a substantial price effect.

The growth in food-industry imports (+7.6%) was supported by fresh and frozen meat (+9.6%) and dairy products (+10.7%). Oils and fats also warrant attention: their

Table 3.1 Structure of Italy's agri-food trade (percentage share)

	2025		2024		2023	
	Imports	Exports	Imports	Exports	Imports	Exports
Seeds	1.3	0.8	1.3	0.8	1.3	0.8
Cereals	5.7	0.1	6.1	0.1	7.2	0.2
Fresh Pulses and Vegetables	1.7	2.6	2.0	2.7	1.9	2.9
Dried Pulses and Vegetables	0.5	0.1	0.6	0.1	0.6	0.1
Citrus Fruit	0.5	0.5	0.5	0.5	0.6	0.4
Tropical Fruit	1.4	0.2	1.4	0.2	1.4	0.2
Other Fresh Fruit	1.5	5.1	1.6	4.7	1.5	4.7
Nuts	3.2	0.8	2.6	0.6	2.2	0.7
Raw Vegetable Textile Fibres	0.1	0.0	0.1	0.0	0.1	0.0
Oilseeds and Oleaginous Fruit	1.7	0.1	2.1	0.1	2.4	0.1
Cocoa, Green Coffee, Tea, and Spices	6.4	0.3	4.9	0.2	3.8	0.2
Floriculture and Nursery Products	1.3	1.8	1.0	1.8	1.1	1.9
Raw Tobacco	0.4	0.5	0.4	0.6	0.3	0.5
Live Animals	4.4	0.2	3.0	0.1	3.0	0.1
Other Livestock Products	0.9	0.1	0.8	0.1	1.0	0.1
Forestry Products	1.1	0.3	1.2	0.3	1.2	0.3
Fishery Products	2.7	0.5	3.0	0.5	3.0	0.5
Hunting Products	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL PRIMARY SECTOR	34.9	14.0	32.5	13.5	32.8	13.9
Rice	0.4	1.2	0.5	1.3	0.4	1.4
Cereal Products	3.1	13.5	3.3	13.9	3.3	13.8
Sugar	1.7	0.3	2.0	0.3	2.5	0.4
Confectionery Products	4.0	5.6	3.3	4.9	2.3	4.5
Fresh and Frozen Meat	9.5	2.8	9.5	2.5	9.8	2.3
Prepared Meat	0.8	3.9	0.8	3.9	0.8	3.9
Fish Products	8.0	1.0	8.3	1.0	8.4	1.0
Processed Vegetables	2.7	6.3	3.0	6.9	2.9	7.1
Processed Fruit	1.6	2.7	1.5	2.5	1.3	2.5
Dairy Products	8.2	10.0	8.1	9.2	7.9	9.2
Oils and Fats	9.1	5.6	9.7	6.4	8.7	5.6
Oilcakes and Animal Feed	3.9	2.6	4.2	2.5	4.5	2.8
Other Food Industry Products	4.9	12.5	5.0	11.9	4.9	11.6
Other Non-Food Products	2.6	0.8	2.5	0.8	2.8	0.9
TOTAL FOOD INDUSTRY	60.4	68.8	61.8	68.1	60.5	67.1
Wine	0.7	11.1	0.8	12.2	0.8	12.6
Grape Must	0.1	0.0	0.1	0.0	0.0	0.1
Other Alcoholic Beverages	2.6	2.9	3.0	3.3	3.1	3.5
Non-Alcoholic Beverages	0.6	2.6	0.7	2.6	0.7	2.6
TOTAL BEVERAGES	4.0	16.7	4.5	18.1	4.7	18.7
FOOD AND BEVERAGE INDUSTRY	64.4	85.5	66.3	86.2	65.2	85.8
Other Agri-Food Products (Below Threshold: 1-24)	0.7	0.5	1.2	0.2	2.0	0.3
TOTAL AGRI-FOOD PRODUCTS	**100**	**100**	**100**	**100**	**100**	**100**

Source: CREA elaborations based on ISTAT data.

Table 3.2 Italy's agri-food trade by sector

	2025 (€ Million)			% Change 2025/2024			
				Value		Quantity	
	Imports	Exports	NTB (%)	Imports	Exports	Imports	Exports
Seeds	923.2	561.8	-24.3	4.4	3.9	1.8	38.9
Cereals	4,143.8	79.5	-96.2	3.3	-0.2	2.1	12.9
Fresh Pulses and Vegetables	1,235.0	1,873.9	20.6	-5.3	1.7	8.8	1.7
Dried Pulses and Vegetables	372.1	65.6	-70.0	-1.1	0.8	-7.0	4.5
Citrus Fruit	388.3	354.6	-4.5	22.7	12.9	5.4	7.1
Tropical Fruit	1,013.6	131.3	-77.1	7.7	-10.5	5.9	-18.7
Other Fresh Fruit	1,108.5	3,672.6	53.6	8.6	15.0	3.6	12.8
Nuts	2,323.8	568.2	-60.7	38.3	34.4	13.4	24.3
Raw Vegetable Textile Fibres	45.9	20.2	-38.8	-11.5	-1.4	9.2	30.7
Oilseeds and Oleaginous Fruit	1,244.4	54.7	-91.6	-10.7	-10.6	-5.6	-7.0
Cocoa, Green Coffee, Tea, and Spices	4,662.3	240.4	-90.2	43.9	45.0	-0.1	19.6
Floriculture and Nursery Products	928.4	1,284.4	16.1	39.6	4.4	66.1	15.0
Raw Tobacco	261.4	395.2	20.4	9.0	2.6	1.4	0.1
Live Animals	3,209.4	120.2	-92.8	61.0	28.1	44.0	3.8
Other Livestock Products	618.0	106.1	-70.7	21.8	8.1	55.1	-45.5
Forestry Products	815.9	183.3	-63.3	3.6	-12.0	2.3	-36.5
Fishery Products	1,992.0	387.1	-67.5	0.2	11.6	4.7	5.0
Hunting Products	13.9	0.8	-88.8	68.0	8.7	33.0	-4.4
TOTAL PRIMARY SECTOR	25,300.0	10,099.7	-42.9	18.2	9.6	3.1	5.4
Rice	298.1	859.0	48.5	0.3	-4.4	10.3	-4.4
Cereal Products	2,280.1	9,751.3	62.1	6.4	2.8	3.0	3.1
Sugar	1,235.8	209.6	-71.0	-6.3	-2.6	17.9	4.8
Confectionery Products	2,917.7	4,062.6	16.4	33.1	21.2	-1.7	0.3
Fresh and Frozen Meat	6,848.7	2,046.8	-54.0	9.6	18.7	8.0	5.0
Prepared Meat	582.3	2,775.8	65.3	5.7	5.6	4.6	6.5
Fish Products	5,788.8	686.9	-78.8	5.8	-0.9	4.3	9.6
Processed Vegetables	1,954.4	4,543.6	39.8	-2.5	-3.3	0.8	0.6
Processed Fruit	1,136.7	1,955.6	26.5	17.5	14.0	-1.4	2.9
Dairy Products	5,910.0	7,169.8	9.6	10.7	13.7	2.6	9.3
Oils and Fats	6,584.5	4,021.7	-24.2	3.1	-8.3	11.9	11.6
Oilcakes and Animal Feed	2,808.7	1,859.3	-20.3	0.8	7.9	2.9	10.0
Other Food Industry Products	3,541.1	9,012.1	43.6	8.1	11.2	14.9	2.4
Other Non-Food Products	1,851.3	596.2	-51.3	11.3	10.0	9.2	-1.1
TOTAL FOOD INDUSTRY	43,738.2	49,550.4	6.2	7.6	6.6	7.2	4.1
Wine	514.0	8,006.6	87.9	0.9	-3.7	-8.2	-1.9
Grape Must	56.0	26.0	-36.6	55.2	-17.1	-6.2	-39.2
Other Alcoholic Beverages	1,864.1	2,091.3	5.7	-5.3	-7.4	-4.2	-9.7
Non-Alcoholic Beverages	470.5	1,894.3	60.2	1.4	8.1	0.3	8.6
TOTAL BEVERAGES	2,904.5	12,018.3	61.1	-2.5	-2.7	-3.7	1.8
FOOD AND BEVERAGE INDUSTRY	46,642.7	61,568.7	13.8	6.9	4.6	6.2	3.5
Other Agri-Food Products (Below Threshold: 1-24)	509.8	358.5	-17.4	-34.6	113.8	-73.8	-84.0
TOTAL AGRI-FOOD PRODUCTS	**72,452.5**	**72,026.9**	**-0.3**	**10.1**	**5.6**	**4.5**	**3.8**

Source: CREA elaborations based on ISTAT data.

increase in value (+3.1%) was accompanied by much stronger growth in imported quantities (+11.9%), indicating a moderation in international prices following the marked increases of recent years. Beverage imports moved in the opposite direction (-2.5% in value), mainly owing to a 5.3% decline in "other alcoholic beverages".
As regards exports, fresh fruit, which accounts for 41% of primary-sector exports, increased by approximately 14% compared with 2024.
Within the food industry, particularly dynamic categories included confectionery (+21.2%), processed fruit (+14.0%), and dairy products (+13.7%). Oils and fats were particularly noteworthy, as export value declined (-8.3%) while quantities increased by 11.6%, indicating, as in the case of imports, a significant reduction in average prices.
As anticipated, the beverage sector moved in the opposite direction (-2.7%), penalised mainly by the contraction in the value of wine (-3.7%) and other alcoholic beverages (-7.4%), accompanied by declines in exported quantities of 1.9% and 9.7%, respectively. Although also affected by US trade policy, this performance confirms the fluctuating trend that has characterised wine exports in recent years. Following the decline in the first year of the COVID-19 pandemic, 2021 and 2022 recorded a marked recovery in wine export value, although in 2022 this was mainly linked to price increases. A new decline in both value and quantity occurred in 2023, followed by another increase in exports in 2024.
The United States is the principal destination market for Italian wine, and the new US trade policy undoubtedly affected sales to the country, which fell by 8.8% in value and 5.9% in quantity in 2025. However, even excluding the United States, wine exports would still have declined, albeit more moderately, confirming the slowdown over the past three years in the upward trend that had characterised the sector in the preceding period.
Despite the decline in 2025, wine remains a fundamental component of Made in Italy exports. With exports worth EUR 8 billion in 2025, it accounted for two-thirds of total beverage exports and more than 11% of Italian agri-food exports.
Tables 3.3 and 3.4 show the structure of imports and exports for the twenty leading agri-food products ranked by trade value.
In 2025, the total value of Italian agri-food imports continued to increase, and the top 20 purchased products accounted for 47% of the total. Green coffee ranked first, exceeding EUR 3.6 billion and increasing by 43.5% in value despite a slight decline in quantity (-2.2%), confirming the substantial contribution of the price component. Processed fish followed, reaching EUR 3.2 billion and increasing in both value (+6%) and quantity (+7.3%), together with cocoa-based products, consisting mainly of semi-finished products such as cocoa butter and cocoa paste. As with coffee, the surge in international prices drove the strong increase in the value of cocoa-based products (+36.8%), while purchased quantities declined (-3.7%). Seed oils and vegetable fats also recorded notable growth, increasing by 39.3% in value and 17.3% in quantity. Extra virgin olive oil moved in the opposite direction: import value declined by 11.9%, despite a sharp increase in imported quantities (+54.5%), signalling the aforementioned moderation in the average unit import value following the marked rise of the previous two years. Other major declines in import value concerned soybeans (-15.3%), sugar and other sugar products (-6.3%), oilcakes and feed (-4%), semi-processed pork (-2.8%), and durum wheat (-3.4%).
The total value of Italian agri-food exports also continued to grow in 2025. The top 20 products accounted for more than 50% of foreign agri-food sales and generally recorded positive trends, although with some notable exceptions. Cocoa-based confectionery ranked first, exceeding EUR 3.6 billion owing to a marked increase in value (+21.4%); non-decaffeinated roasted coffee followed, increasing by 23.6% and exceeding EUR 3 billion. For both items, this trend was driven by higher import prices for raw materials, which were partly reflected in average unit export values.
Particularly positive results, mainly in value but also partly in volume, were recorded for Grana Padano and Parmigiano Reggiano (+18.1%), apples (+16.0%), prepared or preserved fruit (+22.6%), bakery products (+10.8%), and curd and other fresh cheeses (+11.3%). By contrast, preserved and peeled tomatoes (-7.9%), extra virgin olive oil (-17.2%), other liqueurs" (-4.6%), and non-egg, unfilled pasta (-1.9%) declined.

Table 3.3 Structure of Italy's agri-food imports: top 20 products

	Values (€ Million)		% Share		% Change 2025/2024	
	2025	2024	2025	Cumulative	Value	Quantity
Green Coffee	3,649.9	2,544.0	5.0	5.0	43.5	-2.2
Processed Fish	3,204.0	3,022.4	4.4	9.5	6.0	7.3
Cocoa-based products	2,658.5	1,943.6	3.7	13.1	36.8	-3.7
Seed Oils and Vegetable Fats	2,523.6	1,811.7	3.5	16.6	39.3	17.3
Extra Virgin Olive Oil	2,151.9	2,442.5	3.0	19.6	-11.9	54.5
Frozen Crustaceans and Molluscs	2,012.7	1,887.2	2.8	22.4	6.7	-0.4
Breeding Cattle	1,973.7	1,129.7	2.7	25.1	74.7	29.8
Oilcakes and Animal Feed	1,734.8	1,806.3	2.4	27.5	-4.0	2.6
Maize	1,540.3	1,451.2	2.1	29.6	6.1	-2.3
Semi-Processed Fresh or Chilled Pork	1,531.8	1,576.1	2.1	31.7	-2.8	9.8
Common Wheat and Spelt	1,436.5	1,389.5	2.0	33.7	3.4	4.8
Semi-Processed Fresh or Chilled Beef	1,416.1	1,177.1	2.0	35.7	20.3	-2.7
Sugar and Other Sugar Products	1,235.8	1,318.6	1.7	37.4	-6.3	17.9
Semi-Hard Cheeses	1,156.3	1,081.7	1.6	39.0	6.9	6.3
Curd and Other Fresh Cheeses	1,077.4	990.9	1.5	40.4	8.7	4.8
Dog and Cat Food	1,073.9	978.9	1.5	41.9	9.7	6.4
Soybeans	939.7	1,109.2	1.3	43.2	-15.3	-5.3
Biscuits and Pastry Products	932.0	857.8	1.3	44.5	8.6	5.0
Durum Wheat	895.3	926.7	1.2	45.7	-3.4	8.6
Raw Cocoa	826.6	515.9	1.1	46.9	60.2	12.5
TOTAL AGRI-FOOD PRODUCTS	72,452.5	65,809.6	100	100	10.1	4.5

Source: CREA elaborations based on ISTAT data.

With regard to the main types of exported wine, sales of packaged PDO red and rosé wines declined (-6.7% in value and -1.9% in quantity), while sparkling wines and PDO white wines proved more resilient.

Given the importance of the US market for some of these products, it is useful to compare their sales performance in the United States in 2025 with that in the rest of the world. For Grana Padano and Parmigiano Reggiano, the trend in the US market was consistent with the overall trend, with exports to the United States increasing sharply in value (+21%) while exported volumes remained broadly stable compared with 2024. For extra virgin olive oil, the decline in the value of sales to the United States was more pronounced (-27.9%) than in the rest of the world and was accompanied by a slight decrease in exported volumes. The contraction in exports of PDO wines was also greater in the US market, both for red wines (-12.9% in value) and for white wines, which were more resilient, declining by 6.2% compared with 2024. Pasta moved in the opposite direction, recording better sales performance in the United States than in overall exports in 2025, with increases in both value (+1.9%) and, especially, quantity (+5.3%).

The quarterly trends in total agri-food imports and exports reveal considerable heterogeneity among the principal Italian agri-food products, reflecting differing dynamics between raw materials and processed products.

As regards imports (Figure 3.1), positive changes in value throughout the year were recorded for green coffee, cocoa-based products, seed oils and vegetable fats, cattle for rearing, and frozen crustaceans and molluscs. In particular, green coffee maintained very high growth rates in every quarter, although these moder-

Table 3.4 Structure of Italy's agri-food exports: top 20 products

	Values (€ Million)		% Share		% Change 2025/2024	
	2025	2024	2025	Cumulative	Value	Quantity
Cocoa-based Products	3,628.7	2,989.5	5.0	5.0	21.4	-1.1
Roasted Coffee, Not Decaffeinated	3,034.5	2,455.0	4.2	9.3	23.6	-4.4
Non-Egg, Unfilled Pasta	2,881.1	2,935.9	4.0	13.3	-1.9	2.3
Biscuits and Pastry Products	2,870.2	2,752.4	4.0	17.2	4.3	1.4
Preserved and Peeled Tomatoes	2,770.1	3,006.4	3.8	21.1	-7.9	-2.0
Extra Virgin Olive Oil	2,066.8	2,496.2	2.9	24.0	-17.2	18.2
Other Sparkling Wines (PDO)	1,864.4	1,897.2	2.6	26.5	-1.7	2.3
Packaged Red and Rosé Wines (PDO)	1,794.9	1,923.5	2.5	29.0	-6.7	-1.9
Grana Padano and Parmigiano Reggiano	1,789.0	1,515.2	2.5	31.5	18.1	1.5
Bakery Products	1,703.1	1,536.6	2.4	33.9	10.8	6.5
Meat Extracts, Soups, and Sauces	1,660.8	1,680.5	2.3	36.2	-1.2	-0.4
Curd and Other Fresh Cheeses	1,625.1	1,459.8	2.3	38.4	11.3	7.3
Other Liqueurs	1,368.1	1,434.8	1.9	40.3	-4.6	-7.7
Other Prepared Pork	1,228.4	1,182.3	1.7	42.0	3.9	4.2
Apples	1,187.4	1,023.4	1.6	43.7	16.0	17.2
Packaged White Wines (PDO)	1,151.3	1,141.0	1.6	45.3	0.9	1.5
Oilcakes, Meals, and Animal Feed	1,150.2	1,050.7	1.6	46.9	9.5	10.7
Prepared or Preserved Fruit	1,138.2	928.7	1.6	48.5	22.6	5.5
Other Preserved or Prepared Pulses and Vegetables	999.6	960.0	1.4	49.9	4.1	4.8
Table Grapes	972.8	896.9	1.4	51.2	8.5	16.3
TOTAL AGRI-FOOD PRODUCTS	72,026.9	68,217.0	100	100	5.6	3.8

Source: CREA elaborations based on ISTAT data.

ated in the second half of the year, as did the increases for cocoa-based products. Cattle for rearing recorded the strongest performance, peaking above 100% in the third quarter. This change in value was accompanied by a smaller, but still substantial, increase in imported quantities. France remained by far Italy's largest supplier, with a share close to 90%. By contrast, the value of extra virgin olive oil imports declined in every quarter, although this was attributable to the sharp fall in prices noted above. The value of purchases of oilcakes and feed also decreased, especially in the second half of 2025.

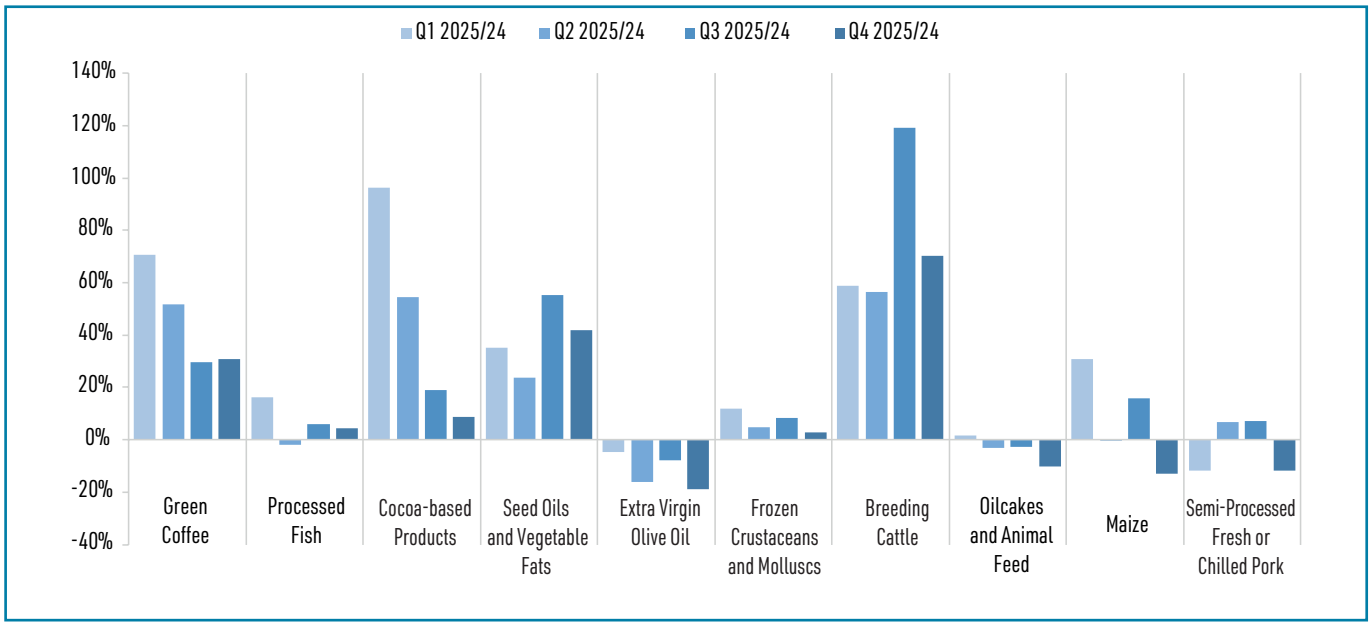
As regards exports (Figure 3.2), the pattern was more heterogeneous.

Supported by price increases, export values for roasted coffee and cocoa-based confectionery recorded double-digit growth throughout 2025. A similar pattern was observed for Grana Padano and Parmigiano Reggiano, whose sales value recorded double-digit increases in every period considered. As already noted, sales value also increased sharply in the United States during a year characterised by considerable uncertainty in the US market. This performance was better than that recorded in other markets; however, it should be noted that cheese had already been subject to tariffs of around 15% before 2025. The excellent performance in the US market nevertheless warrants emphasis.

Positive results in both value and quantity were recorded for bakery products in every quarter, with growth also extending to the US market. Overall, 2025 marked an excellent performance in terms of sales for these products in all major European, North American, and Asian markets.

By contrast, some products recorded less favourable trends. In particular, preserved and peeled tomatoes

Figure 3.1 Quarterly trend in the value of Italy's agri-food imports by main products (year-on-year percentage changes)

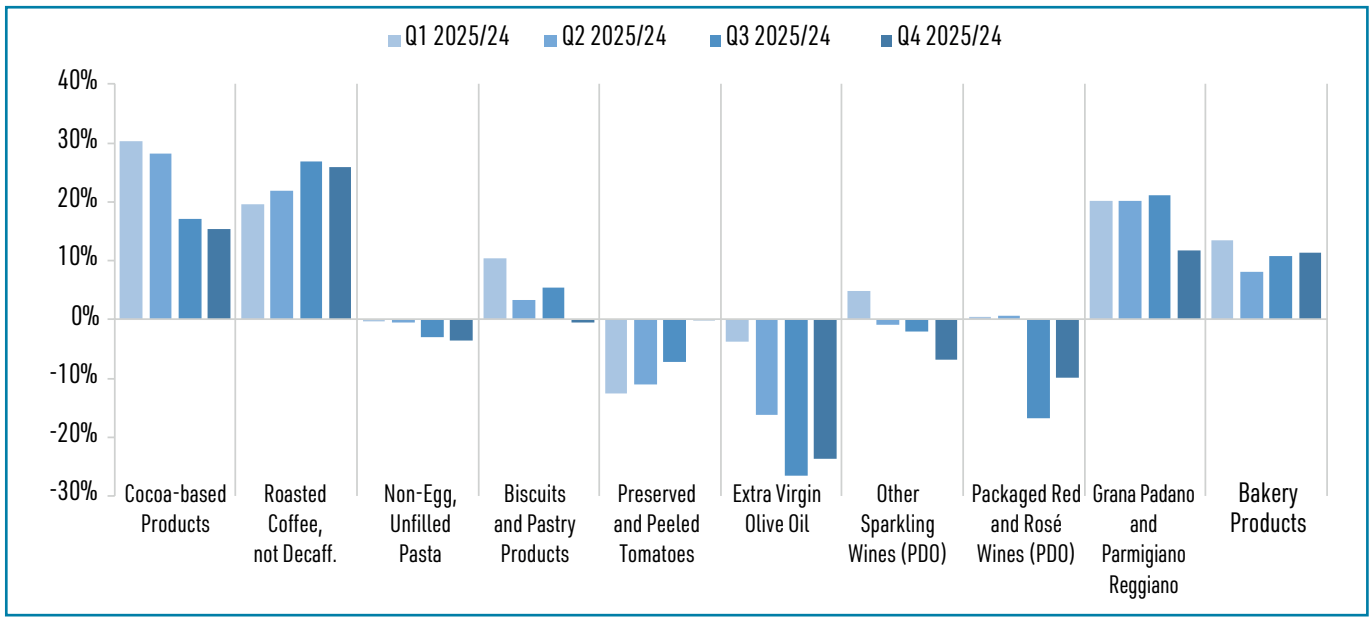


Source: CREA elaborations based on ISTAT data.

showed negative changes in value during the first nine months, while exported quantities were more resilient and increased in the final quarter. For extra virgin olive oil, sales value declined progressively, from a slight decrease in the first quarter to contractions of more than 20% in the second half of the year, mainly owing to the price component. Pasta also recorded a negative trend in value, although the changes were considerably smaller: sales value declined progressively, while quantities increased slightly in every quarter.

Particular attention should be paid to wine, which, as noted above, showed signs of weakening during 2025. PDO sparkling wines recorded a positive trend in the first quarter, followed by a progressive deterioration. A similar development was observed for packaged PDO red and rosé wines, for which the contraction was more pronounced in the second half of the year. Although the United States is the principal destination market for both products, export performance in the final six months would have remained negative even excluding the direct effect of tariffs, albeit to a lesser extent. Overall, exported volumes proved more resilient than values, recording smaller declines or slight increases.

Figure 3.2 Quarterly trend in the value of Italy's agri-food exports by main products (year-on-year percentage changes)



Source: CREA elaborations based on ISTAT data.

Table 3.5 Fresh and frozen meat: main imported products

	2025 Value (€ Million)	% Share of Sector	NTB %	% Change 2025/2024		
				Value	Quantity	NTB[1]
Semi-Processed Fresh or Chilled Pork	1,531.8	22.4	-92.9	-2.8	9.8	0.3
Semi-Processed Fresh or Chilled Beef	1,416.1	20.7	-52.2	20.3	-2.7	1.1
Fresh Boneless Beef	808.9	11.8	-41.5	12.2	-10.3	5.2
Fresh or Chilled Boneless Pork	586.9	8.6	-97.7	-9.2	1.7	-0.5
Fresh or Chilled Beef Carcasses and Half-Carcasses	502.5	7.3	-49.9	28.8	7.0	9.4
Frozen Boneless Beef	420.9	6.1	-29.4	48.3	36.7	-8.2
Fresh or Chilled Pork Carcasses and Half-Carcasses	370.2	5.4	-94.2	-8.7	1.6	1.1
Semi-Processed Poultry Meat	288.2	4.2	13.1	24.0	11.7	-4.6
Fresh or Frozen Offal	200.1	2.9	-12.9	10.4	35.4	-5.4
Sheep and Goat Carcasses and Half-Carcasses	182.8	2.7	-70.9	26.0	21.4	5.7
Horse Meat	163.9	2.4	-92.2	61.7	67.6	-7.4
Frozen Boneless Pork	136.2	2.0	-76.1	-8.7	1.8	-2.8
Semi-Processed Frozen Pork	64.8	0.9	-47.5	-4.8	14.0	-3.7
Semi-Processed Sheep and Goat Meat	53.9	0.8	-75.5	12.4	12.7	-5.5
Unprocessed Poultry Meat	44.2	0.6	54.0	12.7	0.5	-1.0
Other Fresh or Frozen Meat	36.3	0.5	-58.3	-6.9	0.3	-0.4
Semi-Processed Frozen Beef	20.1	0.3	-16.7	-5.1	-10.9	-4.3
Boneless Sheep and Goat Meat	10.4	0.2	-71.2	24.1	11.8	-4.1
Frozen Beef Carcasses and Half-Carcasses	6.8	0.1	-87.8	-46.0	-44.4	-13.7
Frozen Pork Carcasses and Half-Carcasses	3.8	0.1	21.1	-12.6	-5.4	8.7
TOTAL	6,848.7	100	-54.0	9.6	8.0	2.8

[1] The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Source: CREA elaborations based on ISTAT data.

Table 3.6 Oils and fats: main imported products

	2025 Value (€ Million)	% Share of Sector	NTB %	% Change 2025/2024		
				Value	Quantity	NTB[1]
Seed Oils and Vegetable Fats	2,523.6	38.3	-51.2	39.3	17.3	-9.8
Extra Virgin Olive Oil	2,151.9	32.7	-2.0	-11.9	54.5	-3.1
Animal Oils and Fats for Industrial Use	490.5	7.4	-24.8	36.9	31.1	-5.8
Other Oils and Fats of Vegetable Origin for Industrial Use	484.8	7.4	-64.9	173.8	243.8	-24.1
Other Olive Oil	327.8	5.0	10.8	-25.4	41.2	-4.0
Palm Oil for Non-Food Use	188.9	2.9	-99.3	-73.8	-73.7	0.6
Rape or Rapeseed Oil for Non-Food Use	166.8	2.5	-98.7	80.3	59.7	-1.1
Lampante Olive Oil	119.0	1.8	-94.3	-48.0	10.8	2.6
Margarine	115.4	1.8	43.0	13.5	-0.7	13.3
Animal Oils and Fats for Food Use	15.8	0.2	42.9	14.3	30.1	-3.1
TOTAL	**6,584.5**	**100**	**-24.2**	**3.1**	**11.9**	**-5.6**

[1] The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Source: CREA elaborations based on ISTAT data.

Table 3.7 Dairy products: main imported products

	2025 Value (€ Million)	% Share of Sector	NTB %	% Change 2025/2024		
				Value	Quantity	NTB[1]
Semi-Hard Cheeses	1,156.3	19.6	-63.7	6.9	6.3	0.3
Curd and Other Fresh Cheeses	1,077.4	18.2	20.3	8.7	4.8	1.1
Yogurt and Fermented Milk	692.6	11.7	-92.0	18.7	15.4	-2.7
Butter and Milk Fats	626.8	10.6	-69.6	29.7	22.1	-2.6
Bulk Liquid Milk	370.1	6.3	-96.3	0.7	-7.6	0.0
Skimmed Milk Powder	234.7	4.0	-72.1	7.0	8.7	9.3
Bulk Cream	202.9	3.4	-64.3	-6.4	-5.4	-2.5
Other Hard Cheeses	196.3	3.3	7.8	16.0	11.5	0.8
Processed Cheese	157.8	2.7	-51.2	9.3	10.6	1.3
Ice Cream	151.2	2.6	51.1	-4.8	-13.0	8.6
TOTAL	**5,910.0**	**100**	**9.6**	**10.7**	**2.6**	**1.3**

[1] The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Source: CREA elaborations based on ISTAT data.

Table 3.8 Cereal derivatives: main exported products

	2025 Value (€ Million)	% Share of Sector	NTB %	% Change 2025/2024		
				Value	Quantity	NTB[(1)]
Non-Egg, Unfilled Pasta	2,881.1	29.5	99.2	-1.9	2.3	0.1
Biscuits and Pastry Products	2,870.2	29.4	51.0	4.3	1.4	-1.5
Bakery Products	1,703.1	17.5	39.5	10.8	6.5	1.7
Stuffed Pasta	816.6	8.4	92.9	-0.3	-2.1	-0.6
Common-Wheat Flour and Meal	292.6	3.0	91.6	8.6	10.1	1.8
Unfilled Egg Pasta	271.1	2.8	91.3	3.5	5.5	-5.5
Other Flour, Meal, and Similar Products	264.7	2.7	-5.2	5.9	2.0	2.1
Cooked or Otherwise Prepared Pasta	179.7	1.8	81.2	0.4	5.4	-3.6
Rusks	163.9	1.7	62.9	2.9	5.3	-4.2
Durum-Wheat Flour and Meal	109.5	1.1	75.1	-0.1	6.7	-5.8
Other Pasta	71.7	0.7	19.4	-7.9	10.0	-6.0
Other Processed Cereals	57.8	0.6	2.8	-8.7	-10.2	1.0
Couscous	57.6	0.6	83.2	-6.9	-3.2	-2.8
Flour-Based Food Preparations	11.7	0.1	-70.8	-10.1	-2.2	-1.4
TOTAL	**9,751.3**	**100**	**62.1**	**2.8**	**3.1**	**-1.1**

(1) The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Source: CREA elaborations based on ISTAT data.

Table 3.9 Wine: main exported products

	2025 Value (€ Million)	% Share of Sector	NTB %	% Change 2025/2024		
				Value	Quantity	NTB[(1)]
Other Sparkling Wines (PDO)	1,864.4	23.3	98.7	-1.7	2.3	0.0
Packaged Red and Rosé Wines (PDO)	1,794.9	22.4	95.1	-6.7	-1.9	-0.3
Packaged White Wines (PDO)	1,151.3	14.4	94.3	0.9	1.5	0.1
Packaged Red and Rosé Wines (PGI)	939.7	11.7	98.3	-1.3	-1.3	-0.4
Packaged White Wines (PGI)	355.2	4.4	96.2	-7.7	-8.6	-0.8
Packaged Aromatized Wines	249.1	3.1	96.7	-5.6	-7.6	0.0
Semi-Sparkling Wines (PDO)	234.6	2.9	99.9	-3.1	2.2	0.5
Other Sparkling Wines	205.6	2.6	94.8	-5.0	2.4	-1.1
Asti Sparkling Wine (PDO)	156.2	2.0	99.3	-6.7	-10.0	-0.4
Semi-Sparkling Wines (PGI)	136.5	1.7	99.9	-14.7	-15.7	0.0
Other Packaged Red and Rosé Wines	127.6	1.6	92.2	-10.0	-9.7	0.0
Other Semi-Sparkling Wines	113.0	1.4	90.3	14.5	17.3	-0.5
Bulk Red and Rosé Wines (PDO)	101.8	1.3	89.0	-7.1	-3.2	-4.9
Other Bulk White Wines	84.9	1.1	23.4	-8.0	-8.3	2.5
Packaged Fortified Wines (PDO or PGI)	70.2	0.9	75.2	-19.9	-6.6	-8.3
TOTAL	**8,006.6**	**100**	**87.9**	**-3.7**	**-1.9**	**-0.5**

(1) The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Source: CREA elaborations based on ISTAT data.

Table 3.10 Dairy products: main exported products

	2025 Value (€ Million)	% Share of Sector	NTB %	% Change 2025/2024		
				Value	Quantity	NTB[1]
Grana Padano and Parmigiano Reggiano	1,789.0	25.0	99.9	18.1	1.5	0.0
Curd and Other Fresh Cheeses	1,625.1	22.7	20.3	11.3	7.3	1.1
Grated or Powdered Cheese	952.3	13.3	91.9	15.4	5.6	-0.5
Fresh Cheeses (Fat Content > 40%)	490.2	6.8	62.7	13.2	-1.1	-8.7
Ice Cream	467.6	6.5	51.1	18.8	20.7	8.6
Semi-Hard Cheeses	256.3	3.6	-63.7	7.8	8.9	0.3
Pecorino and Fiore Sardo	252.8	3.5	91.9	-4.6	-2.8	-1.7
Other Hard Cheeses	229.4	3.2	7.8	17.8	9.4	0.8
Whey	215.7	3.0	43.1	24.6	8.8	-1.2
Gorgonzola	209.8	2.9	99.9	2.3	-2.1	0.0
TOTAL	**7,169.8**	**100**	**9.6**	**13.7**	**9.3**	**1.3**

[1] The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Source: CREA elaborations based on ISTAT data.

3.2 The agri-food balance by "Origin and Destination" and by "Trade Specialisation"

To illustrate some of the main structural features of trade, data on Italy's agri-food trade are presented using two product-classification criteria. Under the first criterion, products are grouped according to their origin, distinguishing the primary sector (PS) from the food industry (FI), and according to their use, distinguishing products intended for direct consumption from those used as production inputs. The resulting agri-food balance comprises eight product groups (Tables 3.11 and 3.12) and is referred to as the "origin and destination balance".

Under the second criterion, products are grouped according to trade specialisation. In Tables 3.13 and 3.14, products are first classified into three macro-groups according to their trade balance (negative, positive, or variable), based on Italy's position in the international agri-food trade in these products: stable net importer, stable net exporter, or a position that varies from year to year. Net-exporting products are further divided into Made in Italy products and other products.

Looking at the origin and destination balance for 2025, products intended for direct food consumption accounted for 84.3% of agri-food exports and 54.1% of imports; both shares declined slightly compared with 2024. On the export side, the share of primary products intended for food consumption increased by 0.4 percentage points, while that of processed products for consumption declined by 1.3 percentage points. On the import side, the shares of products intended for direct consumption originating from the primary sector and the food industry declined by 0.3 and 0.9 percentage points, respectively, compared with 2024 (Table 3.11). At the same time, the share of raw materials intended for industrial processing increased, confirming dependence on foreign supplies for certain commodities and the sharp increase in import prices for some of them.

The trade-specialisation balance complements the analysis of agri-food flow dynamics. Table 3.13 identifies the sectors with a persistently negative balance in 2025, for which Italy relies on foreign supplies. In particular, the share of arable crops declined (-0.8 percentage points

Table 3.11 Balance by Origin and Destination: structure by product groups (percentage weight)

	2025			2024			2023		
	Imports	Exports	NTB	Imports	Exports	NTB	Imports	Exports	NTB
Primary-Sector Products for Direct Food Consumption	9.6	9.5	-0.9	9.9	9.1	-2.3	9.8	9.4	-2.7
Raw Materials for the Food Industry	17.3	1.0	-89.0	15.8	0.8	-90.2	16.0	0.9	-90.0
Primary-Sector Products Used as Intermediate Inputs	5.4	2.2	-41.7	4.1	2.2	-28.3	4.1	2.2	-30.6
Other Primary-Sector Products for Non-Food Uses	2.6	1.3	-33.4	2.7	1.4	-30.4	3.0	1.5	-35.0
TOTAL PRIMARY-SECTOR PRODUCTS	34.9	14.0	-42.9	32.5	13.5	-39.8	32.8	13.9	-41.0
Food-Industry Products for Direct Food Consumption	44.5	74.8	25.1	45.4	76.1	26.9	43.6	75.0	25.8
Food-Industry Products Used as Intermediate Inputs in the Food Industry	11.5	6.7	-27.0	12.0	6.4	-29.0	12.3	6.4	-31.9
Food-Industry Products for the Primary Sector	2.4	1.6	-20.3	2.7	1.5	-26.4	3.0	1.8	-26.8
Food-Industry Products for Non-Food Uses	5.9	2.4	-43.3	6.1	2.3	-44.8	6.3	2.6	-42.9
TOTAL FOOD AND BEVERAGE INDUSTRY PRODUCTS	64.4	85.5	13.8	66.3	86.2	14.8	65.2	85.8	12.9
Other Agri-Food Products (Below Threshold: 1-24)	0.7	0.5	-17.4	1.2	0.2	-64.6	2.0	0.3	-76.2
TOTAL AGRI-FOOD TRADE	100	100	-0.3	100	100	1.8	100	100	-0.8

Source: CREA elaborations based on ISTAT data.

Table 3.12 Origin and Destination Balance, 2025 (EUR million)

	2025 (€ Million)		% Change 2025/2024			
			Values		Quantity	
	Imports	Exports	Imports	Exports	Imports	Exports
Primary-Sector Products for Direct Food Consumption	6,936.3	6,809.5	6.2	9.3	7.3	6.8
Raw Materials for the Food Industry	12,559.4	732.2	20.6	36.6	1.4	13.4
Primary-Sector Products Used as Intermediate Inputs	3,891.6	1,603.0	44.6	6.6	14.0	21.1
Other Primary-Sector Products for Non-Food Uses	1,912.8	954.9	7.8	0.8	3.4	-25.4
TOTAL PRIMARY-SECTOR PRODUCTS	25,300.0	10,099.7	18.2	9.6	3.1	5.4
Food-Industry Products for Direct Food Consumption	32,252.8	53,911.0	8.0	3.9	10.5	2.2
Food-Industry Products Used as Intermediate Inputs in the Food Industry	8,345.1	4,800.2	5.4	10.1	1.2	5.6
Food-Industry Products for the Primary Sector	1,734.8	1,150.2	-4.0	9.5	2.6	10.7
Food-Industry Products for Non-Food Uses	4,310.1	1,707.3	6.8	11.0	1.7	9.5
TOTAL FOOD AND BEVERAGE INDUSTRY PRODUCTS	46,642.7	61,568.7	6.9	4.6	6.2	3.5
Other Agri-Food Products (Below Threshold: 1-24)	509.8	358.5	-34.6	113.8	-73.8	-84.0
TOTAL AGRI-FOOD TRADE	**72,452.5**	**72,026.9**	**10.1**	**5.6**	**4.5**	**3.8**

Source: CREA elaborations based on ISTAT data.

compared with 2024), while that of livestock and livestock-product imports increased (+1.5 percentage points). The latter trend was influenced by the aforementioned sharp increase in purchases of live cattle from France, Italy's principal supplier. Overall, net-importing products increased their share by 1 percentage point compared with 2024, thereby accounting for 78.7% of the total value of Italian agri-food imports. On the export side, the share of Made in Italy products declined by 1.3 percentage points, to 72.5% of total agri-food exports. Despite this decrease, Made in Italy remains the principal strength of the national agri-food system, confirming Italy's strong export specialisation in higher-value-added products that are more readily recognised in international markets. As discussed in greater detail in the following chapter, Made in Italy exports nevertheless increased by 3.7% in value in 2025, although this growth was more moderate than that of the agri-food sector as a whole.

Table 3.13 Agri-food Balance by Trade Specialisation (percentage share)

	2025			2024			2023		
	Imports	Exports	NTB	Imports	Exports	NTB	Imports	Exports	NTB
Arable Crops (COP)	8.2	0.6	-86.4	9.0	0.6	-86.6	10.5	0.7	-88.2
Livestock and Derived Products	23.5	7.2	-53.1	22.0	6.7	-52.1	22.2	6.6	-54.6
Fisheries	10.7	1.4	-76.9	11.3	1.4	-76.5	11.3	1.4	-77.8
Tropical Products	8.1	0.6	-85.5	6.7	0.6	-83.5	5.5	0.6	-81.9
Other Net-Importing Fruit and Vegetable Products	9.9	3.9	-43.5	10.0	3.7	-44.4	9.8	3.9	-43.7
Net-Importing Floriculture and Nursery Products	0.8	0.3	-39.7	0.6	0.4	-27.0	0.7	0.4	-28.3
Forestry	1.1	0.3	-63.3	1.2	0.3	-58.2	1.2	0.3	-55.4
Other Net-Importing Products	16.4	10.1	-24.0	16.9	9.8	-25.1	17.9	10.5	-26.8
NET IMPORTING PRODUCTS	**78.7**	**24.5**	**-52.7**	**77.7**	**23.5**	**-52.3**	**79.1**	**24.4**	**-53.4**
TOTAL MADE IN ITALY	**19.2**	**72.5**	**58.0**	**19.7**	**73.8**	**59.1**	**17.5**	**73.1**	**60.9**
OTHER NET EXPORTING PRODUCTS	**1.2**	**2.4**	**33.8**	**1.2**	**2.4**	**33.9**	**1.1**	**2.1**	**28.3**
PRODUCTS WITH A VARIABLE TRADE BALANCE	**0.3**	**0.1**	**-50.1**	**0.3**	**0.1**	**-46.3**	**0.2**	**0.1**	**-40.7**
TOTAL AGRI-FOOD TRADE	**100**	**100**	**-0.3**	**100**	**100**	**1.8**	**100**	**100**	**-0.8**

Note: Any difference between the sum of the macro-items and the agri-food total is due to the "Other agri-food products (below threshold: 1-24)".

Source: CREA elaborations based on ISTAT data.

Table 3.14 Agri-food Balance by Trade Specialisation, 2025 (EUR million)

	2025 (€ Million)		% Change 2025/2024			
			Values		Quantity	
	Imports	Exports	Imports	Exports	Imports	Exports
Arable Crops (COP)	5,945.7	435.1	0.6	2.1	1.0	22.6
Livestock and Derived Products	17,001.6	5,213.5	17.2	14.0	9.4	5.8
Fisheries	7,742.7	1,011.1	4.4	2.4	4.5	8.5
Tropical Products	5,882.7	459.4	34.4	16.3	3.2	-9.1
Other Net-Importing Fruit and Vegetable Products	7,151.4	2,818.6	9.0	11.6	3.5	10.1
Net-Importing Floriculture and Nursery Products	558.4	240.8	32.5	-0.5	31.0	-8.3
Forestry	815.9	183.3	3.6	-12.0	2.3	-36.5
Other Net-Importing Products	11,896.6	7,292.3	6.7	9.3	8.5	3.7
NET IMPORTING PRODUCTS	**56,995.1**	**17,654.1**	**11.5**	**10.1**	**3.9**	**4.3**
TOTAL MADE IN ITALY	**13,889.2**	**52,192.4**	**7.4**	**3.7**	**10.1**	**3.3**
OTHER NET EXPORTING PRODUCTS	**871.4**	**1,759.7**	**9.9**	**9.5**	**4.7**	**12.5**
PRODUCTS WITH A VARIABLE TRADE BALANCE	**187.1**	**62.2**	**11.8**	**1.4**	**-18.0**	**-14.4**
TOTAL AGRI-FOOD TRADE	**72,452.5**	**72,026.9**	**10.1**	**5.6**	**4.5**	**3.8**

Note: Any difference between the sum of the macro-items and the agri-food total is due to the "Other agri-food products (below threshold: 1-24)".

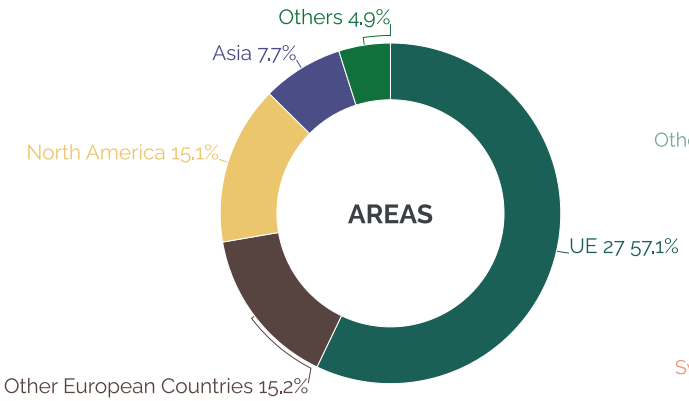
Source: CREA elaborations based on ISTAT data.

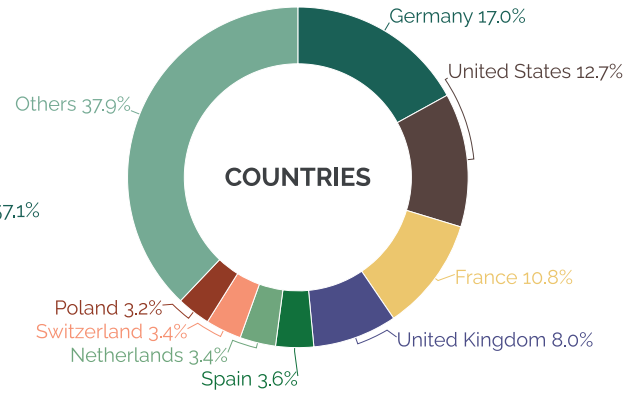
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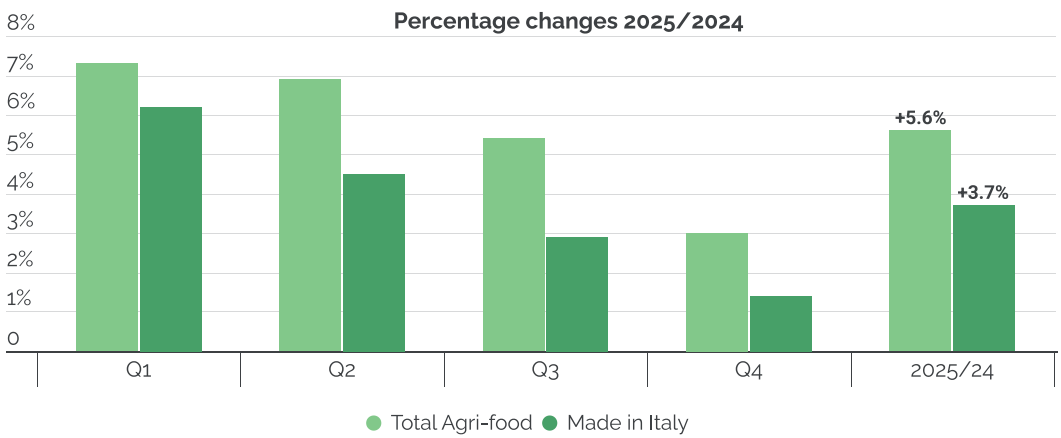
STRUCTURE AND TRENDS OF MADE IN ITALY AGRI-FOOD TRADE



MADE IN ITALY AGRI-FOOD EXPORT







4.1 Made in Italy trends

The Report defines Made in Italy products as those that are widely recognised internationally as characteristic of Italy and that play a key role in Italian agri-food exports.
These products are grouped according to their degree of processing into agricultural Made in Italy, first-stage processing Made in Italy and second-stage processing Made in Italy.
In 2025, Made in Italy exports accounted for 72.5% of foreign sales of Italian agri-food products (Table 4.1),

Table 4.1 Structure of Made in Italy agri-food exports (percentage share)

	2025	2024	2023
Cereals	0.01	0.01	0.02
Fresh Fruit	5.1	4.7	4.8
Fresh Vegetables	2.3	2.3	2.6
Floriculture and Nursery Products	1.4	1.4	1.5
AGRICULTURAL MADE IN ITALY	8.9	8.5	8.9
Rice	1.2	1.3	1.4
Processed Tomatoes	4.5	5.0	5.2
Fruit Juices and Cider	1.2	1.2	1.2
Other Prepared or Preserved Vegetables and Fruit	3.1	2.9	2.9
Cured Meat Products	3.6	3.6	3.6
Cheeses	5.4	5.0	5.0
Olive Oil	3.4	4.5	3.4
Packaged Wine	10.5	11.6	11.9
Bulk Wine	0.5	0.6	0.6
Vinegar	0.5	0.5	0.5
Mineral Water	1.3	1.3	1.3
Essences	0.4	0.3	0.3
Other Processed Products	3.0	3.1	3.1
FIRST-STAGE PROCESSING MADE IN ITALY	38.6	41.0	40.4
Pasta	5.9	6.3	6.4
Bakery Products	6.6	6.5	6.2
Other Cereal-Based Products	0.6	0.6	0.7
Cocoa-Based Products	5.0	4.4	4.0
Ice Cream	0.6	0.6	0.6
Coffee	4.2	3.6	3.6
Spirits and Liqueurs	2.0	2.2	2.4
SECOND-STAGE PROCESSING MADE IN ITALY	25.0	24.2	23.8
TOTAL MADE IN ITALY	72.5	73.8	73.1
TOTAL AGRI-FOOD	**100**	**100**	**100**

Note: The sectors shown in the table include only Made in Italy products, namely products widely recognised internationally as characteristic of Italy.

Source: CREA elaborations based on ISTAT data.

amounting to approximately EUR 52.2 billion, an increase of 3.7% compared with 2024 (Table 4.2).
The agricultural component accounted for 12.1% of total Made in Italy exports and 8.9% of agri-food exports, amounting to EUR 6.37 billion. In 2025, export value for this aggregate increased by 9.6%, accompanied by a 10.8% rise in quantities, confirming the positive performance recorded in 2024. This result reflected growth in foreign sales in all four quarters of 2025, peaking in the second quarter (+15.2%) (Figure 4.1). Fresh fruit, the most important sector within the aggregate, with a share of 58%, recorded a 14.6% increase in export value, accompanied by a 13.1% rise in quantities. Fresh vegetables ranked second within the aggregate, with exports amounting to EUR 1.6 billion in 2025, up by 1.8% in value and 1.3% in quantity compared with the previous year.
First-stage processing Made in Italy accounted for 38.6% of Italian agri-food exports and 53.3% of Made in Italy exports, amounting to EUR 27.8 billion in the year

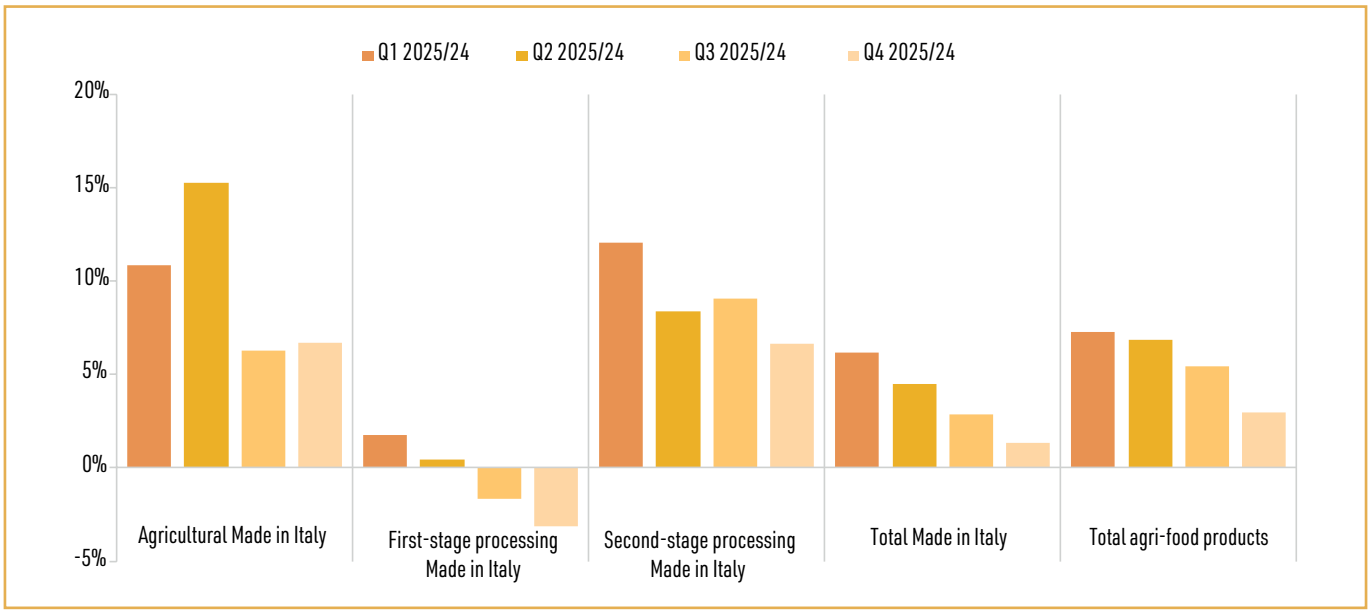
Table 4.2 Trends in Made in Italy agri-food exports

	2025	% Change 2025/2024	
	(EUR Million)	Values	Quantity
Cereals	9.3	-4.5	-5.2
Fresh Fruit	3,696.5	14.6	13.1
Fresh Vegetables	1,625.4	1.8	1.3
Floriculture and Nursery Products	1,043.5	5.6	18.1
AGRICULTURAL MADE IN ITALY	6,374.8	9.6	10.8
Rice	859.0	-4.4	-4.4
Processed Tomatoes	3,230.5	-5.8	-1.2
Fruit Juices and Cider	834.9	-0.2	0.0
Other Prepared or Preserved Vegetables and Fruit	2,206.5	12.5	5.0
Cured Meat Products	2,621.6	5.4	6.4
Cheeses	3,860.6	13.4	1.5
Olive Oil	2,473.7	-19.9	15.1
Packaged Wine	7,581.6	-3.9	-1.6
Bulk Wine	388.9	-1.8	-3.2
Vinegar	354.4	-2.7	-2.7
Mineral Water	955.4	8.1	7.3
Essences	255.8	20.3	25.9
Other Processed Products	2,184.1	1.7	0.5
FIRST-STAGE PROCESSING MADE IN ITALY	27,806.9	-0.7	1.5
Pasta	4,220.2	-1.3	2.3
Bakery Products	4,737.2	6.5	3.6
Other Cereal-Based Products	459.6	4.3	7.9
Cocoa-Based Products	3,628.7	21.4	-1.1
Ice Cream	467.6	18.8	20.7
Coffee	3,034.5	23.6	-4.4
Spirits and Liqueurs	1,462.9	-4.6	-9.0
SECOND-STAGE PROCESSING MADE IN ITALY	18,010.7	8.9	1.9
TOTAL MADE IN ITALY	**52,192.4**	**3.7**	**3.3**

Note: The sectors shown in the table include only Made in Italy products, namely products widely recognised internationally as characteristic of Italy.

Source: CREA elaborations based on ISTAT data.

Figure 4.1 Quarterly trend in the value of Italian agri-food exports by type of Made in Italy product (year-on-year percentage changes)



Source: CREA elaborations based on ISTAT data.

under review. In 2025, the share of this component declined owing to the negative value trend in sectors such as oil and wine, analysed in detail in Chapter 3, which was only partly offset by increased sales of cheese and cured meat products. Overall, foreign sales of the aggregate declined by 0.7% compared with 2024, while quantities sold increased slightly (+1.5%). Following increases in the first two quarters, the aggregate's export value declined in the third (-1.6%) and fourth quarters (-3.1%).

Packaged wine is the sector driving exports in this Made in Italy aggregate, with a share of 27.3% and a value of EUR 7.6 billion. In 2025, foreign sales in this aggregate declined in both value (-3.9%) and quantity (-1.6%). Cheese and processed tomatoes followed at some distance, with foreign sales amounting to approximately EUR 3.9 billion and EUR 3.2 billion, respectively, and shares of the aggregate of 13.9% for cheese and 11.6% for processed tomatoes. In 2025, cheese exports increased by 13.4% in value and 1.5% in quantity, confirming the previous year's trend, whereas processed tomato exports declined by 5.8% in value compared with 2024, with quantities down by 1.2%. Olive oil followed closely, with a value of EUR 2.5 billion and an 8.9% share of the aggregate; compared with 2024, export value declined by 19.9%, while quantities sold increased by 15.1%, owing to the aforementioned price effect.

Second-stage processing Made in Italy accounted for 25% of agri-food exports and approximately 34.5% of total Made in Italy exports. Compared with 2024, foreign sales of the aggregate increased in value (+8.9%), supported by positive results in all four quarters and a peak in the first three months (+12.1%). Quantities sold also increased in 2025, although more moderately (+1.9%). The principal sectors within the aggregate were bakery products, with a share of 26.3%, and pasta overall (dry, egg, and filled), with a share of 23.4%. Bakery products, amounting to EUR 4.7 billion, increased in both value

(+6.5%) and quantity (+3.6%); pasta, by contrast, recorded a slight decline in sales value (-1.3%) alongside an increase in exported quantities (+2.3%).

At product level, apples, table grapes, and kiwifruit accounted for 44.8% of agricultural Made in Italy exports (Table 4.3). In recent years, apple exports have shown a strong capacity to respond both to COVID-related difficulties and to other challenges, including price trends and the Russian embargo, which has been in force for more than ten years. Following growth in both the value and volume of apple exports in 2024, the positive trend strengthened further in 2025, with increases of 16% in value and 17.2% in quantity. For table grapes, quantities sold abroad increased by 16.3% in 2025, confirming the reversal that began in 2024 after three consecutive years of declining export volumes; export value also maintained a positive trend (+8.5%). Following the setback in 2024, marked by a substantial contraction in exported volumes, kiwifruit exports also returned to growth in 2025, both in quantity (+19.8%) and value (+26.5%). Among other export products, outdoor plants also recorded a positive performance in both value and volume (+10.5% and +23.8%, respectively).

The principal exported products within first-stage processing Made in Italy were, in order, preserved and peeled tomatoes, with exports of approximately EUR 2.77 billion; extra virgin olive oil, with exports exceeding EUR 2 billion; "other PDO sparkling wines", valued at EUR 1.86 billion; and packaged PDO red and rosé wines, with foreign sales of EUR 1.8 billion (Table 4.4). In 2025, exports of preserved and peeled tomatoes declined in both volume (-2%) and value (-7.9%). Exported volumes of extra virgin olive oil increased by 18.2%, while the sharp reduction in average unit values resulted in a 17.2% decline in olive oil export value.

PDO red and rosé wines are the principal export product within the packaged wine sector. Following the reversal recorded in 2024, when foreign sales returned to growth in both value and quantity after two years of decline, 2025 saw a renewed downturn, with reductions of 6.7% in value and 1.9% in quantity. By contrast, the "other PDO sparkling wines" aggregate maintained its positive growth in volume in 2025, increasing by 2.3%, although at a slower rate than in 2024, while export value declined by 1.7%.

Within second-stage processing Made in Italy, the principal exported products were cocoa-based confectionery, roasted coffee, and non-egg, unfilled pasta. In 2025, cocoa-based confectionery exports reached just over EUR 3.6 billion (Table 4.5), increasing compared with 2024 owing to growth in foreign sales value (+21.4%). Roasted coffee, with exports of approximately EUR 3 billion, recorded a 23.6% increase in value despite a 4.4% re-

Table 4.3 Agricultural Made in Italy: main exported products

	Values (EUR Million)		Share 2025	% Change 2025/2024	
	2025	2024	(%)	Values	Quantity
Apples	1,187.4	1,023.4	18.6	16.0	17.2
Table Grapes	972.8	896.9	15.3	8.5	16.3
Kiwifruit	698.0	552.0	10.9	26.5	19.8
Outdoor Plants	571.9	517.4	9.0	10.5	23.8
Lettuces, Chicory, and Other Salad Greens	533.0	519.4	8.4	2.6	2.2
Other Fresh Vegetables	454.0	443.3	7.1	2.4	2.5
Grapevine Cuttings and Fruit and Vegetable Plants	286.8	295.4	4.5	-2.9	-5.6
Cauliflowers and Cabbages	259.2	243.1	4.1	6.6	10.9
Tomatoes	226.1	206.0	3.5	9.8	9.2
Watermelons and Melons	226.1	208.4	3.5	8.5	4.9
AGRICULTURAL MADE IN ITALY	**6,374.8**	**5,818.5**	**100**	**9.6**	**10.8**

Source: CREA elaborations based on ISTAT data.

duction in quantities sold. Pasta, valued at EUR 2.9 billion, recorded an increase in exported volumes (+2.3%) and a decline in export value (-1.9%). Finally, biscuits and pastry products, amounting to EUR 2.9 billion, confirmed a positive export trend for the fourth consecutive year, although less pronounced than in 2024, with growth in both volume (+1.4%) and value (+4.3%).

For several leading first- and second-stage processing Made in Italy products, the United States is a reference market, and the new US trade policy affected the trends described above. As analysed in greater detail in Chapter 2, to which reference is made for further discussion, this policy negatively affected export performance in sectors such as olive oil and wine. By contrast, for other products, including pasta and cheese, sales trends in the United States in 2025 were positive and were in line with, or even better than, those observed in other major destination markets.

Table 4.4 First-stage processing Made in Italy: main exported products

	Values (EUR Million)		Share 2025	% Change 2025/2024	
	2025	2024	(%)	Values	Quantity
Preserved and Peeled Tomatoes	2,770.1	3,006.4	10.0	-7.9	-2.0
Extra Virgin Olive Oil	2,066.8	2,496.2	7.4	-17.2	18.2
Other PDO Sparkling Wines	1,864.4	1,897.2	6.7	-1.7	2.3
Packaged PDO Red and Rosé Wines	1,794.9	1,923.5	6.5	-6.7	-1.9
Grana Padano and Parmigiano Reggiano	1,789.0	1,515.2	6.4	18.1	1.5
Meat Extracts, Soups, and Sauces	1,660.8	1,680.5	6.0	-1.2	-0.4
Other Prepared Pork Products	1,228.4	1,182.3	4.4	3.9	4.2
Packaged PDO White Wines	1,151.3	1,141.0	4.1	0.9	1.5
Prepared or Preserved Fruit	1,138.2	928.7	4.1	22.6	5.5
Other Preserved or Prepared Pulses and Vegetables	999.6	960.0	3.6	4.1	4.8
FIRST-STAGE PROCESSING MADE IN ITALY	**27,806.9**	**27,997.9**	**100**	**-0.7**	**1.5**

Source: CREA elaborations based on ISTAT data

Table 4.5 Second-stage processing Made in Italy: main exported products

	Values (EUR Million)		Share 2025	% Change 2025/2024	
	2025	2024	(%)	Values	Quantity
Cocoa-Based Products	3,628.7	2,989.5	20.1	21.4	-1.1
Roasted Coffee, Not Decaffeinated	3,034.5	2,455.0	16.8	23.6	-4.4
Non-Egg, Unfilled Pasta	2,881.1	2,935.9	16.0	-1.9	2.3
Biscuits and Pastry Products	2,870.2	2,752.4	15.9	4.3	1.4
Bakery Products	1,703.1	1,536.6	9.5	10.8	6.5
Other Spirits	1,368.1	1,434.8	7.6	-4.6	-7.7
Filled Pasta	816.6	819.2	4.5	-0.3	-2.1
Ice Cream	467.6	393.5	2.6	18.8	20.7
Common Wheat Flour Products	292.6	269.5	1.6	8.6	10.1
Unfilled Egg Pasta	271.1	262.0	1.5	3.5	5.5
SECOND-STAGE PROCESSING MADE IN ITALY	**18,010.7**	**16,534.2**	**100**	**8.9**	**1.9**

Source: CREA elaborations based on ISTAT data

4.2 Geographical distribution of Made in Italy exports

The European Union remained the principal destination market for Made in Italy products. In 2025, it absorbed 77.7% of agricultural Made in Italy exports, 51.7% of first-stage processing Made in Italy exports, and 58% of second-stage processing Made in Italy exports (Table 4.6). The geographical distribution of the other markets varied according to the aggregate considered.

For agricultural Made in Italy, the second reference

Table 4.6 Geographical distribution of Made in Italy exports, 2025 (percentage share)

	EU-27	Other Europ. Countries (non-Med.)	European Med. Third Countries	Asian Med. Third Countries	African Med. Third Countries	North America	Central America	South America	Asia (non-Med.)	Africa (non-Med.)	Oceania
Cereals	97.1	0.3	0.9	0.3	1.2	0.0	0.0	0.0	0.1	0.1	0.1
Fresh Fruit	74.0	11.0	0.5	1.8	2.4	2.0	1.1	2.2	4.8	0.1	0.0
Fresh Vegetables	84.8	14.6	0.3	0.1	0.0	0.0	0.0	0.0	0.2	0.0	0.0
Floriculture and Nursery Products	79.6	13.2	0.7	1.3	1.1	1.0	0.1	0.2	2.8	0.0	0.0
AGRICULTURAL MADE IN ITALY	77.7	12.2	0.5	1.3	1.6	1.3	0.7	1.3	3.3	0.1	0.0
Rice	76.3	13.4	0.9	2.9	0.1	3.4	0.3	1.2	0.7	0.1	0.8
Processed Tomatoes	52.2	17.7	0.5	1.3	1.9	9.3	0.5	1.9	7.8	2.6	4.4
Fruit Juices and Cider	61.6	6.6	0.4	0.9	1.4	15.7	0.5	0.1	11.0	1.4	0.5
Other Prepar. or Preser. Veget. & Fruit	60.0	18.0	0.5	1.0	0.3	10.3	0.5	1.2	4.0	1.1	3.0
Cured Meat Products	67.3	15.2	0.5	0.3	0.0	12.8	0.2	0.8	1.3	0.7	0.8
Cheeses	63.6	12.3	0.4	0.7	0.1	15.3	0.5	0.4	4.9	0.2	1.6
Olive Oil	35.5	10.7	0.5	0.8	0.1	32.7	0.8	1.8	14.5	0.4	2.2
Packaged Wine	40.0	20.9	0.3	0.5	0.0	29.0	1.1	1.1	5.7	0.4	1.1
Bulk Wine	73.1	16.9	0.6	0.0	0.0	5.6	0.1	0.2	3.0	0.2	0.4
Vinegar	39.1	10.1	0.3	0.7	0.3	30.8	1.2	1.5	12.6	0.5	2.9
Mineral Water	30.6	10.6	0.4	1.7	0.1	43.2	1.3	0.7	8.8	0.3	2.3
Essences	60.3	6.6	0.0	1.4	0.4	13.3	0.8	2.2	14.3	0.1	0.6
Other Processed Products	54.9	13.2	0.6	0.6	0.2	21.6	0.3	0.5	4.5	1.9	1.8
FIRST-STAGE PROCES. MADE IN ITALY	51.7	15.7	0.4	0.8	0.4	20.4	0.7	1.0	6.2	0.8	1.8
Pasta	52.6	15.2	0.6	1.5	0.3	17.9	0.6	2.0	6.5	0.6	2.1
Bakery Products	56.4	13.5	1.0	2.6	1.1	11.9	0.6	0.8	9.8	0.3	1.8
Other Cereal-Based Products	58.3	11.1	1.1	2.3	0.3	11.2	0.8	2.4	8.6	1.4	2.5
Cocoa-Based Products	60.3	13.0	0.6	3.4	1.8	6.8	0.3	1.4	8.7	1.1	2.6
Ice Cream	57.2	12.3	1.0	3.3	0.1	16.5	0.2	0.2	7.3	0.1	1.9
Coffee	65.3	12.7	2.3	2.4	1.4	7.3	0.2	1.6	5.2	0.4	1.2
Spirits and Liqueurs	58.1	14.2	0.5	1.3	0.3	15.2	1.2	1.8	5.1	1.1	1.3
SECOND-STAGE PROCES. MADE IN ITALY	58.0	13.6	1.0	2.4	1.0	11.9	0.6	1.5	7.6	0.6	1.9
TOTAL MADE IN ITALY	**57.1**	**14.6**	**0.6**	**1.4**	**0.7**	**15.1**	**0.6**	**1.2**	**6.3**	**0.7**	**1.6**

Note: The sectors shown in the table include only Made in Italy products, namely products widely recognised internationally as characteristic of Italy.

Source: CREA elaborations based on ISTAT data.

market comprised Other non-Mediterranean European Countries, particularly Switzerland and the United Kingdom, with a share of 12.2%. They were followed, at some distance, by non-Mediterranean Asian countries, with 3.3%, while North America accounted for 1.3% of the aggregate's foreign sales. The EU absorbed 84.8% of fresh vegetable exports, while 14.6% was destined for Other non-Mediterranean European Countries. For fresh fruit, 74% of exports were directed to the EU, 11% to Other non-Mediterranean European Countries, and 4.8% to non-Mediterranean Asian countries.

For first-stage processing Made in Italy, the second reference market after the EU remained North America, which maintained a share above 20% despite the contraction. It was followed by Other non-Mediterranean European Countries, with 15.7%, and, at a greater distance, non-Mediterranean Asia, with 6.2%.

Considering individual sectors, the EU remained the reference market for exports of rice (76.3%), bulk wine (73.1%), cured meat products (67.3%), cheese (63.6%), essences (60.3%), other prepared vegetables or fruit (60%), fruit juices and cider (61.6%), and processed tomatoes (52.2%).

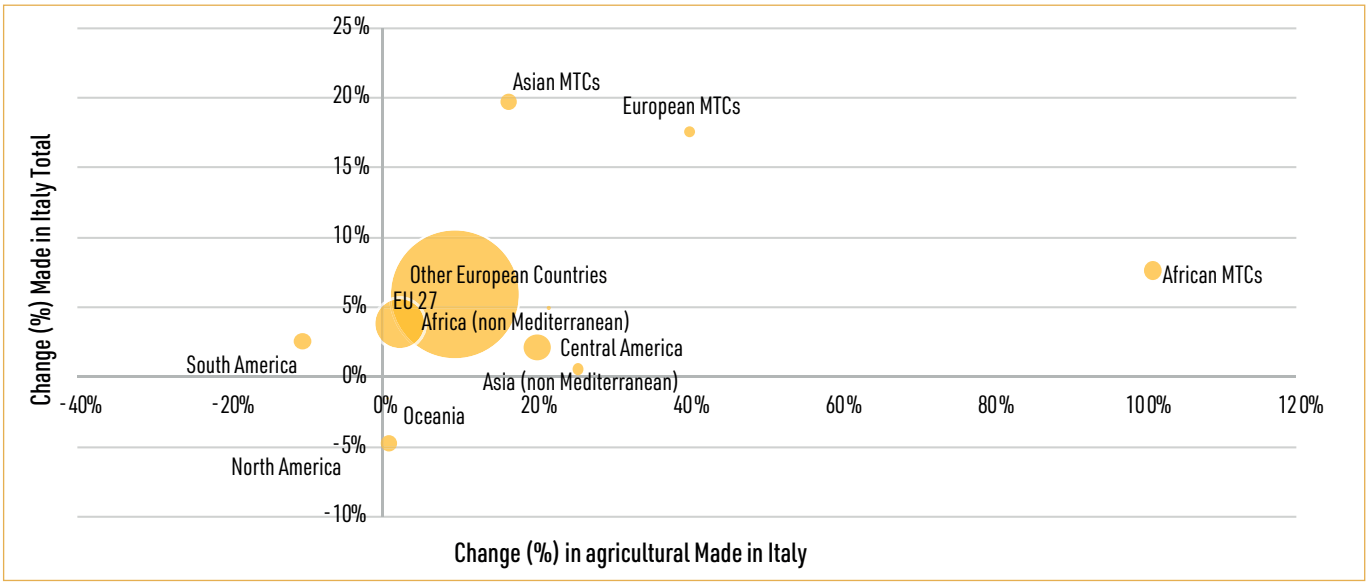
For olive oil (35.5%) and packaged wine (40%), the European Union accounted for a market share below the aggregate average. Important destination markets for these sectors included North America, Asia, and Other non-Mediterranean European Countries. In particular, North America absorbed 32.7% of foreign olive oil sales and 29% of packaged wine sales; non-Mediterranean Asian countries accounted for 14.5% of olive oil exports and 5.7% of packaged wine exports; and Other non-Mediterranean European Countries accounted for 20.9% of packaged wine exports and 10.7% of olive oil exports. North America's share of olive oil exports declined, while Asia's increased. It should nevertheless be noted that exports to North America, although declining in value, increased in quantity in 2025. In Asia, sales to South Korea and China performed particularly well, with strong increases in both value and quantity.

For second-stage processing Made in Italy, the second destination market was Other non-Mediterranean European Countries, with a share of 13.6%, followed by North America, with 11.9%, and Asia, with 7.6%. Looking at the geographical distribution of the aggregate's individual sectors, more than half of pasta exports were directed to EU countries, 15.2% to Other non-Mediterranean European Countries, 17.9% to North America, and 6.5% to non-Mediterranean Asian countries. For bakery products, the EU absorbed 56.4% of exports, followed by Other non-Mediterranean European Countries (13.5%), North America (11.9%), and Asia (9.8%). The 1.8% share of sales directed to Oceania is also noteworthy. Cocoa-based confectionery was present in almost all markets: 60.3% of sales was directed to the EU27, 13% to Other non-Mediterranean European Countries, 8.7% to non-Mediterranean Asia, 6.8% to North America, and 2.6% to Oceania.

In terms of trends, EU purchases of agricultural Made in Italy products increased by 9.5% compared with 2024, while purchases by Other non-Mediterranean European Countries rose by 2.3% (Figure 4.2). Among other destination markets, exports of the aggregate to European Mediterranean Third Countries (MTCs) increased by 40.4% and those to Asian MTCs by 16.7%; exports to Central America also recorded a strong recovery of 25.7% following the setback in 2024. Exports of first-stage processing Made in Italy products to the EU increased by 2.5% compared with 2024 (Figure 4.3). Considering the other destination markets in order of importance, sales to North America declined by 8% and those to Central America by 4.4%, while sales to Asian MTC markets increased by 18%. Finally, as regards second-stage processing Made in Italy exports, EU purchases increased by 9.4% in 2025. Following the 16.7% increase in sales to North America recorded in 2024, sales to this market grew by 4.7% in the year under review; exports to non-Mediterranean Asian countries also increased (+3.8%) (Figure 4.4).

Germany was the leading destination country for Made in Italy agri-food products overall, with a share of 17% in 2025 and exports worth EUR 8.9 billion. The United States followed, with a share of 12.7% and exports of approximately EUR 6.6 billion. France and the United

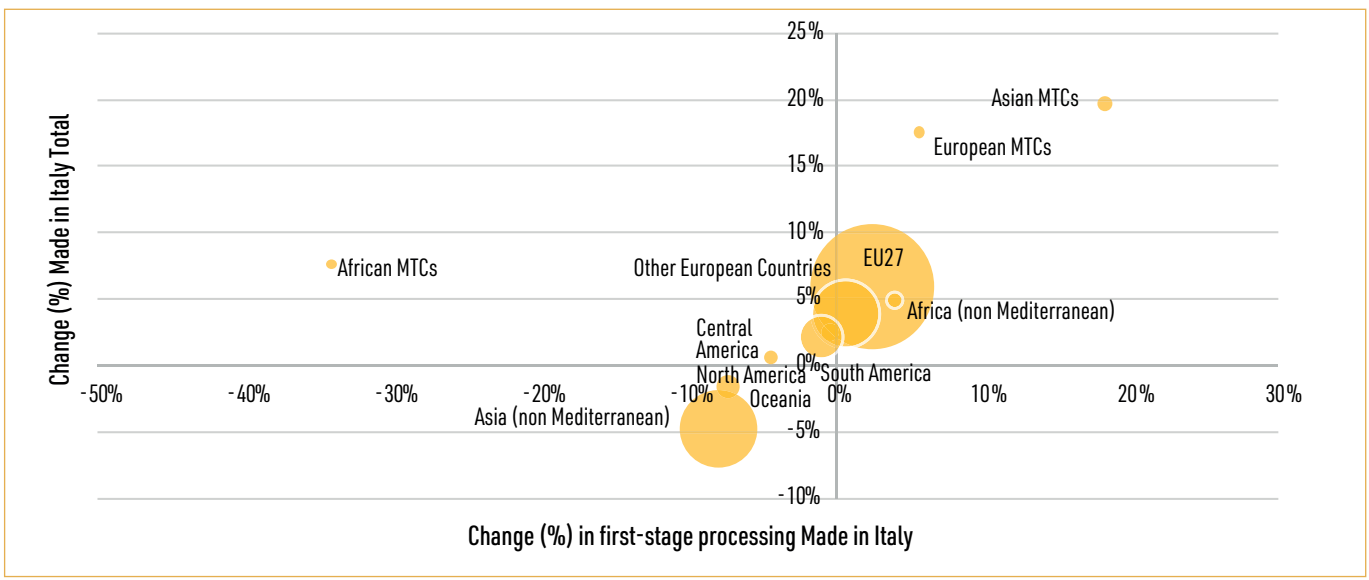
Figure 4.2 Distribution of agricultural Made in Italy exports by area and 2025/2024 trend



Note: The size of the bubbles represents the geographical aggregate's share of the individual Made in Italy component.

Source: CREA elaborations based on ISTAT data.

Figure 4.3 Distribution of first-stage processing Made in Italy exports by area and 2025/2024 trend



Note: The size of the bubbles represents the geographical aggregate's share of the individual Made in Italy component.

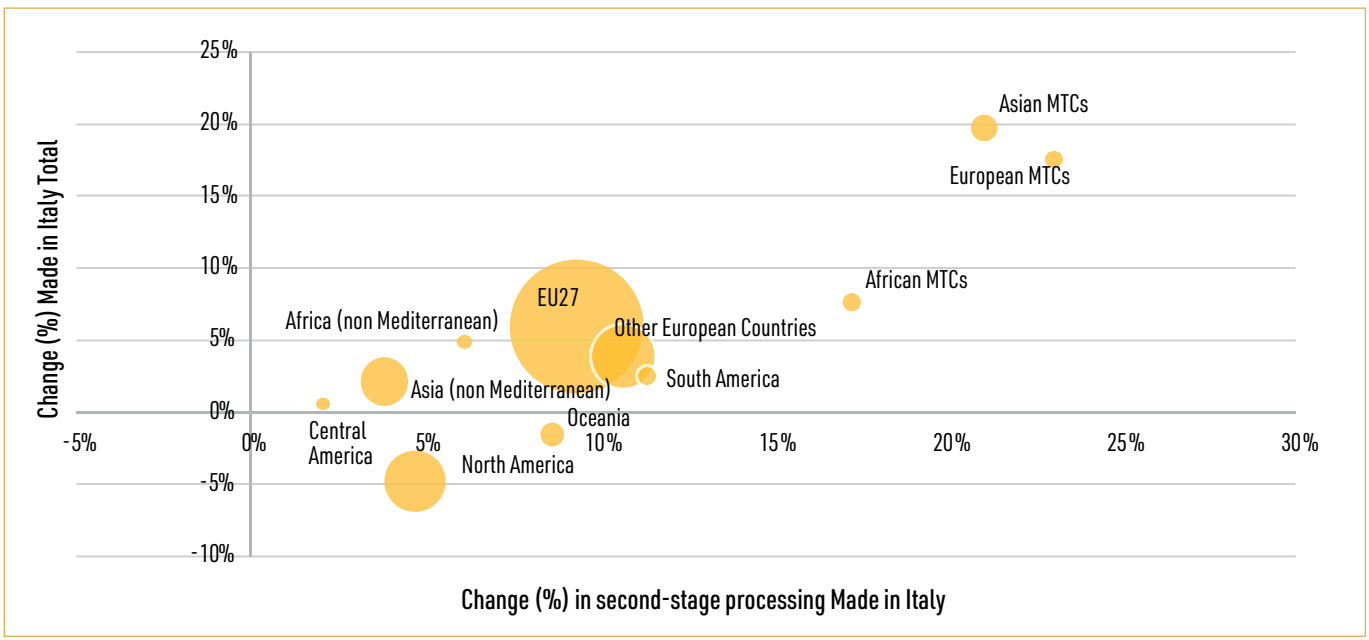
Source: CREA elaborations based on ISTAT data.

Kingdom were also important Made in Italy markets, ranking third and fourth, with shares of 10.8% and 8%, respectively. Exports to these countries increased in both value and volume, with the exception of those to the United States, which declined by 6.2% in value while quantities sold increased by 2.3%.

Germany was the principal destination market for agricultural Made in Italy, with a share of 29.1%. In 2025, exports of the aggregate to this market increased by 9.4% in value and 5.6% in quantity, reaching EUR 1.86 billion and accounting for 16.7% of agri-food exports to Germany (Table 4.7). France was the second destination market for agricultural Made in Italy: exported volumes increased by 8.4% in 2025, accompanied by a 7.9% rise in value. As was the case in Germany, agricultural Made in Italy also accounted for a substantial share of Italian agri-food exports to the Netherlands and Austria, with product shares of 12.5% and 15.5%, respectively. Positive performances were recorded in both cases, with value growth of 3.8% to the Netherlands and 6.2% to Austria.

First-stage processing Made in Italy exports were directed primarily to the United States (17.1%), Germany (16%), France (10.5%), and the United Kingdom (9%) (Table 4.8). The aggregate accounted for a substantial share of agri-food exports to the United States and Germany, at 62.9% and 40.2%, respectively. Exports of the aggregate to the principal markets increased in both value and quantity, except for sales value to the United States, which declined by 9.6%. This trend was affected by higher tariffs and the consequent sharp decline in the value of the two principal products destined for the US market, namely extra virgin olive oil and PDO red wines, although their export volumes proved more resilient. Other important first-stage processing Made in Italy products also recorded lower sales to the United Sta-

Figure 4.4 Distribution of second-stage processing Made in Italy exports by area and 2025/2024 trend



Note: The size of the bubbles represents the geographical aggregate's share of the individual Made in Italy component.

Source: CREA elaborations based on ISTAT data.

Table 4.7 Agricultural Made in Italy: main destination countries

	Value (EUR Million)		Country Share* (%)	Product Share** (%)	% Changes 2025/2024	
	2025	2024			Values	Quantity
Germany	1,858	1,699	29.1	16.7	9.4	5.6
France	616	571	9.7	7.7	7.9	8.4
Netherlands	350	338	5.5	12.5	3.8	14.0
Austria	349	328	5.5	15.5	6.2	6.1
WORLD	**6,375**	**5,818**	**100**	**8.9**	**9.6**	**10.8**

**Country share: share of the country analysed in total Italian exports of the aggregate.*
***Product share: share of the aggregate in total Italian agri-food exports to the country analysed.*
Source: CREA elaborations based on ISTAT data.

Table 4.8 First-stage processing Made in Italy: main destination countries

	Value (EUR Million)		Country Share* (%)	Product Share** (%)	% Change 2025/2024	
	2025	2024			Values	Quantity
United States	4,747	5,249	17.1	62.9	-9.6	0.3
Germany	4,459	4,415	16.0	40.2	1.0	1.1
France	2,923	2,801	10.5	36.5	4.4	3.9
United Kingdom	2,489	2,449	9.0	50.5	1.7	3.9
WORLD	**27,807**	**27,998**	**100**	**38.6**	**-0.7**	**1.5**

**Country share: share of the country analysed in total Italian exports of the aggregate.*
***Product share: share of the aggregate in total Italian agri-food exports to the country analysed.*
Source: CREA elaborations based on ISTAT data.

Table 4.9 Second-stage processing Made in Italy: main destination countries

	Value (EUR Million)		Country Share* (%)	Product Share** (%)	% Change 2025/2024	
	2025	2024			Values	Quantity
Germany	2,542	2,396	14.1	22.9	6.1	0.7
France	2,114	2,039	11.7	26.4	3.7	0.2
United States	1,795	1,732	10.0	23.8	3.7	7.4
United Kingdom	1,414	1,350	7.8	28.7	4.7	-1.6
WORLD	**18,011**	**16,534**	**100**	**25.0**	**8.9**	**1.9**

**Country share: share of the country analysed in total Italian exports of the aggregate.*
***Product share: share of the aggregate in total Italian agri-food exports to the country analysed.*
Source: CREA elaborations based on ISTAT data.

Table 4.10 Total Made in Italy: main destination countries

	Value (EUR Million)		Country Share* (%)	Product Share** (%)	% Change 2025/2024	
	2025	2024			Values	Quantity
Germany	8,859	8,510	17.0	79.8	4.1	2.3
United States	6,605	7,044	12.7	87.5	-6.2	2.3
France	5,653	5,410	10.8	70.5	4.5	3.5
United Kingdom	4,200	4,093	8.0	85.3	2.6	1.9
WORLD	**52,192**	**50,351**	**100**	**72.5**	**3.7**	**3.3**

**Country share: share of the country analysed in total Italian exports of the aggregate.*
***Product share: share of the aggregate in total Italian agri-food exports to the country analysed.*
Source: CREA elaborations based on ISTAT data.

tes in 2025, including sauces and preserved tomatoes, whereas sales of mineral water and Grana Padano and Parmigiano Reggiano increased sharply in value. Focusing only on the second half of the year, when the tariff increase was fully operational, performance in the US market generally deteriorated, with some exceptions, such as cheese. A more detailed analysis of export trends to the United States is provided in the dedicated section of Chapter 2.

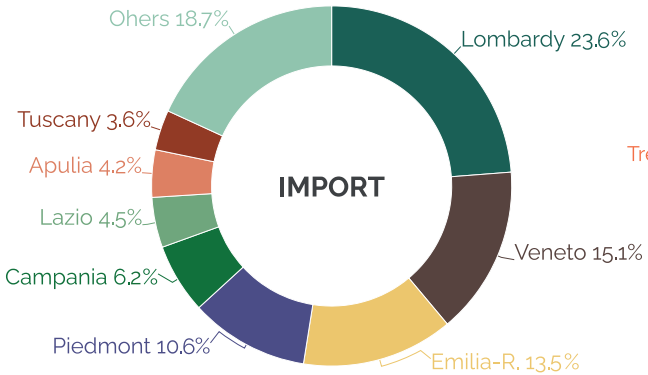
For second-stage processing Made in Italy, Germany and France were the principal destination markets. In France, the aggregate accounted for 26.4% of Italian agri-food exports, driven mainly by cocoa-based confectionery, pasta, biscuits, and pastry products. Germany remained the leading market for exports of this Made in Italy aggregate, with a value of EUR 2.54 billion in 2025; after France, the United States and the United Kingdom followed (Table 4.9). In 2025, flows of the aggregate to these countries increased in both value and volume; in particular, sales to the United States rose by 3.7% in value and 7.4% in quantity. This Made in Italy component includes products that, despite higher tariffs, recorded export values in line with or above those of 2024. This was the case for bakery products, for which quantities sold increased while value growth was more limited, as well as for confectionery and roasted coffee, both of which increased sharply in value and volume. Also in this case, performance in the US market worsened in the second half of the year, although less markedly than for the first-stage processing Made in Italy component.

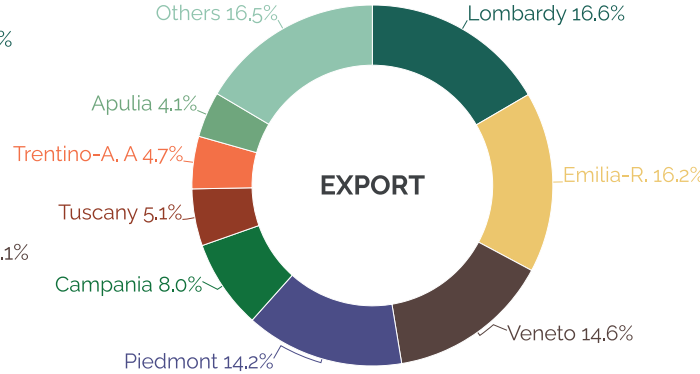
ITALY'S REGIONAL AGRI-FOOD TRADE

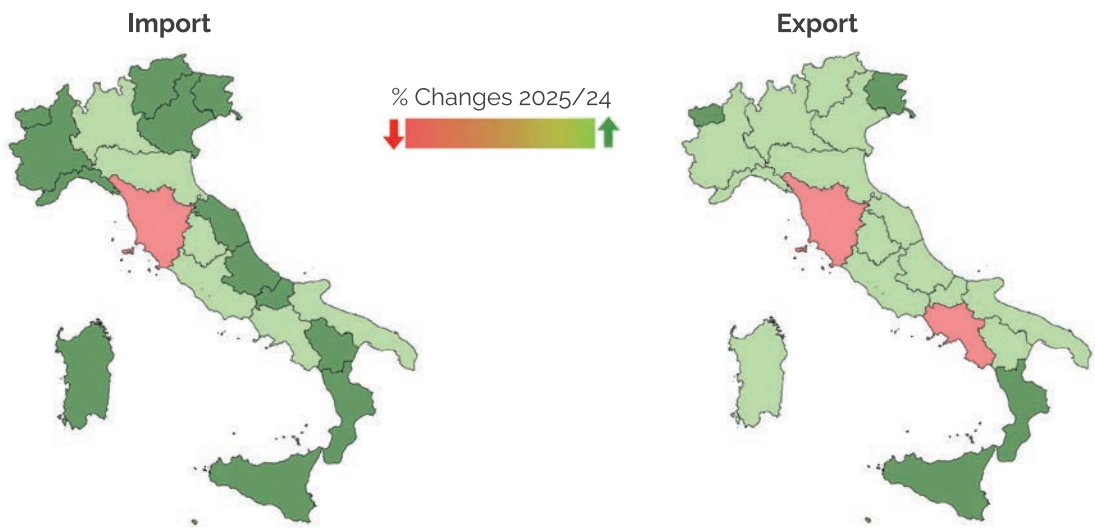


CHAPTER 5

AGRI-FOOD TRADE OF ITALIAN REGIONS







5.1 The role and trends of agri-food trade in the Italian regions

In 2025, the regions of Northern Italy continued to account for the largest shares of agri-food imports and exports.

As in the previous year, approximately 70% of foreign agri-food trade was concentrated in the North of the country. The North-East accounted for the largest share of both imports and exports.

The Southern regions accounted for 12.7% of imports and 15.3% of exports, while Central Italy accounted for 11.3% and 10.2%, respectively. The island regions accounted for slightly more than 3%

Table 5.1 provides a detailed analysis of the contribution of each Italian region to national trade in 2025, distinguishing overall and agri-food import and export flows across the three main segments: the primary sector, the food industry and beverages.

With regard to agri-food exports, Lombardy and Emilia-Romagna each accounted for approximately 16% of the total, followed closely by Veneto and Piedmont, with shares of around 14%. On the import side, Lombardy re-

Table 5.1 Regional Shares of National Trade in 2025 (Percentage Shares)

	Primary Sector		Food Industry		Beverages		Total Agri-Food Trade		Total Trade	
	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports
Piedmont	16.7	5.9	6.6	14.2	17.8	21.2	10.6	14.2	7.8	9.6
Aosta Valley	0.0	0.0	0.0	0.1	0.1	0.5	0.0	0.1	0.1	0.1
Lombardy	16.5	6.9	27.4	19.1	29.4	14.2	23.6	16.6	30.2	26.0
Trentino-Alto Adige	2.0	11.2	3.3	3.3	3.1	5.1	2.8	4.7	1.7	2.0
Veneto	17.1	11.5	13.8	11.9	19.3	28.6	15.1	14.6	10.8	12.4
Friuli-Venezia Giulia	2.7	2.4	1.2	2.5	1.1	2.3	1.7	2.5	1.9	3.2
Liguria	3.5	4.6	2.0	1.3	2.9	0.7	2.6	1.7	2.2	1.5
Emilia-Romagna	11.4	15.5	14.8	18.9	12.1	5.9	13.5	16.2	8.6	13.1
Tuscany	2.0	4.7	4.6	3.9	2.1	10.1	3.6	5.1	9.6	11.9
Umbria	1.3	2.0	2.7	1.8	0.3	0.4	2.1	1.6	0.8	0.9
Marche	0.9	1.2	1.2	0.9	0.6	0.6	1.1	0.9	1.4	2.1
Lazio	4.3	4.9	4.7	2.4	3.3	2.1	4.5	2.7	7.7	5.6
Abruzzo	1.1	0.9	1.5	1.4	0.2	2.3	1.3	1.5	1.0	1.5
Molise	0.1	0.1	0.1	0.6	0.0	0.1	0.1	0.4	0.1	0.2
Campania	7.8	7.0	5.7	10.0	0.9	0.6	6.2	8.0	4.4	3.5
Apulia	5.5	11.1	3.7	3.1	0.5	2.6	4.2	4.1	1.8	1.5
Basilicata	0.2	0.6	0.3	0.4	0.1	0.0	0.3	0.4	0.1	0.2
Calabria	0.3	0.7	0.9	1.0	0.1	0.1	0.6	0.8	0.2	0.2
Sicily	3.2	7.8	2.2	2.0	1.5	1.6	2.5	2.8	2.5	1.9
Sardinia	0.9	0.2	0.7	0.5	0.4	0.2	0.8	0.4	1.3	0.9
ITALY	100	100	100	100	100	100	100	100	100	100

Note: Any difference between the sum of the regions and the Italian total is due to the "Unspecified Regions" category in the ISTAT data.

Source: CREA elaborations based on ISTAT dat

tained its leading position, accounting for 23.6% of total agri-food imports; it was followed, at some distance, by Veneto (15.1%), Emilia-Romagna (13.5%) and Piedmont (10.6%).
Trade in food-industry products partly reflected the geographical distribution observed for the agri-food sector as a whole. By contrast, the Northern regions accounted for a smaller share of primary-sector exports, while the shares of the Southern regions and the Islands were higher.
Beverage trade was highly concentrated in the Northern regions, which accounted for almost 86% of sector imports and 78.5% of exports.
At national level, in 2025 agri-food products accounted for 12.2% of total imports and 11.2% of total exports. Compared with the previous year, the shares of the primary sector and of the food and beverage industry in total foreign trade showed no marked differences: the primary sector accounted for 4.3% of imports and 1.6% of exports, while the food and beverage industry accounted for 7.9% and 9.6%, respectively.
Thirteen regions recorded an above-average share of agri-food products in foreign trade. Calabria (46.9%) and Apulia (29.2%) stood out, followed by Umbria (25.6%), Trentino-Alto Adige (23.4%), Basilicata (21.1%) and Campania (21.0%).
The situation differed for the primary sector, which continued to play a more limited role in the composition of foreign trade, albeit with some exceptions. Apulia recorded the highest share, with agricultural products ac-

Table 5.2 Share of Agri-Food Products in Foreign Trade by Region in 2025 (Percentage Shares)

	Agri-Food Trade/ Total Trade			Primary Sector/ Total Trade			Food and Beverage Industry/ Total Trade		
	Imports	Exports	Imp + Exp	Imports	Exports	Imp + Exp	Imports	Exports	Imp + Exp
Piedmont	16.6	16.5	16.6	9.1	1.0	4.5	7.4	15.5	12.0
Aosta Valley	4.0	12.2	9.3	0.3	0.3	0.3	3.3	11.7	8.7
Lombardy	9.5	7.1	8.4	2.3	0.4	1.4	7.2	6.7	6.9
Trentino-Alto Adige	19.7	26.4	23.4	4.8	8.8	7.0	14.8	17.6	16.3
Veneto	17.1	13.2	14.9	6.7	1.5	3.8	10.3	11.7	11.1
Friuli-Venezia Giulia	11.0	8.8	9.6	6.0	1.2	2.9	4.9	7.5	6.6
Liguria	14.2	12.8	13.6	6.7	4.9	5.9	7.4	7.8	7.6
Emilia-Romagna	19.2	13.9	15.9	5.7	1.9	3.3	13.4	12.0	12.5
Tuscany	4.6	4.8	4.7	0.9	0.6	0.7	3.6	4.1	3.9
Umbria	33.6	19.4	25.6	7.0	3.5	5.0	26.4	15.9	20.5
Marche	9.1	4.7	6.4	2.6	0.9	1.6	6.4	3.7	4.7
Lazio	7.1	5.4	6.3	2.4	1.4	1.9	4.7	4.0	4.4
Abruzzo	16.0	10.7	12.7	4.6	0.9	2.3	11.2	9.7	10.2
Molise	8.9	25.0	18.5	1.5	0.5	0.9	7.0	24.2	17.3
Campania	17.3	25.3	21.0	7.6	3.1	5.5	9.6	22.1	15.4
Apulia	28.3	30.2	29.2	12.9	11.3	12.1	15.2	18.6	16.9
Basilicata	22.5	20.2	21.1	6.9	5.0	5.7	15.2	15.0	15.1
Calabria	36.9	59.2	46.9	5.8	7.3	6.5	30.1	51.1	39.5
Sicily	12.6	16.7	14.5	5.5	6.5	6.0	6.9	9.9	8.2
Sardinia	7.0	4.6	6.0	2.8	0.3	1.7	4.1	4.2	4.2
ITALY	**12.2**	**11.2**	**11.7**	**4.3**	**1.6**	**2.9**	**7.9**	**9.6**	**8.8**

Source: CREA elaborations based on ISTAT data.

counting for 12.9% of imports and 11.3% of exports. On the export side, it was followed by Trentino-Alto Adige (8.8%) and Calabria (7.3%), while Piedmont (9.1%) and Campania (7.6%) ranked among the leading regions for imports.

With reference to the food and beverage industry, Calabria recorded the highest share of total foreign trade (39.5%), followed by Umbria (20.5%) and Molise (17.3%). Calabria ranked first for both exports (51.1%) and imports (30.1%). In exports, it was followed by Molise (24.2%) and Campania (22.1%), while the highest shares of processed-product imports were recorded in Umbria (26.4%) and Apulia (15.2%).

The year 2025 ended with a slight deficit in Italy's agri-food trade balance (EUR -425.6 million), with imports and exports amounting to EUR 72.45 billion and EUR 72 billion, respectively. Compared with 2024, agri-food imports increased by 10.1%, while exports grew by 5.6%. At regional level, the increase in trade values was widespread, with few exceptions.

Lombardy remained the leading region in value of agri-food trade, with imports of EUR 17 billion and exports of EUR 11.9 billion. Veneto and Emilia-Romagna followed in terms of total agri-food trade. Veneto ranked second

Table 5.3 Foreign Trade in Agri-Food Products by Region in 2025 (EUR Million)

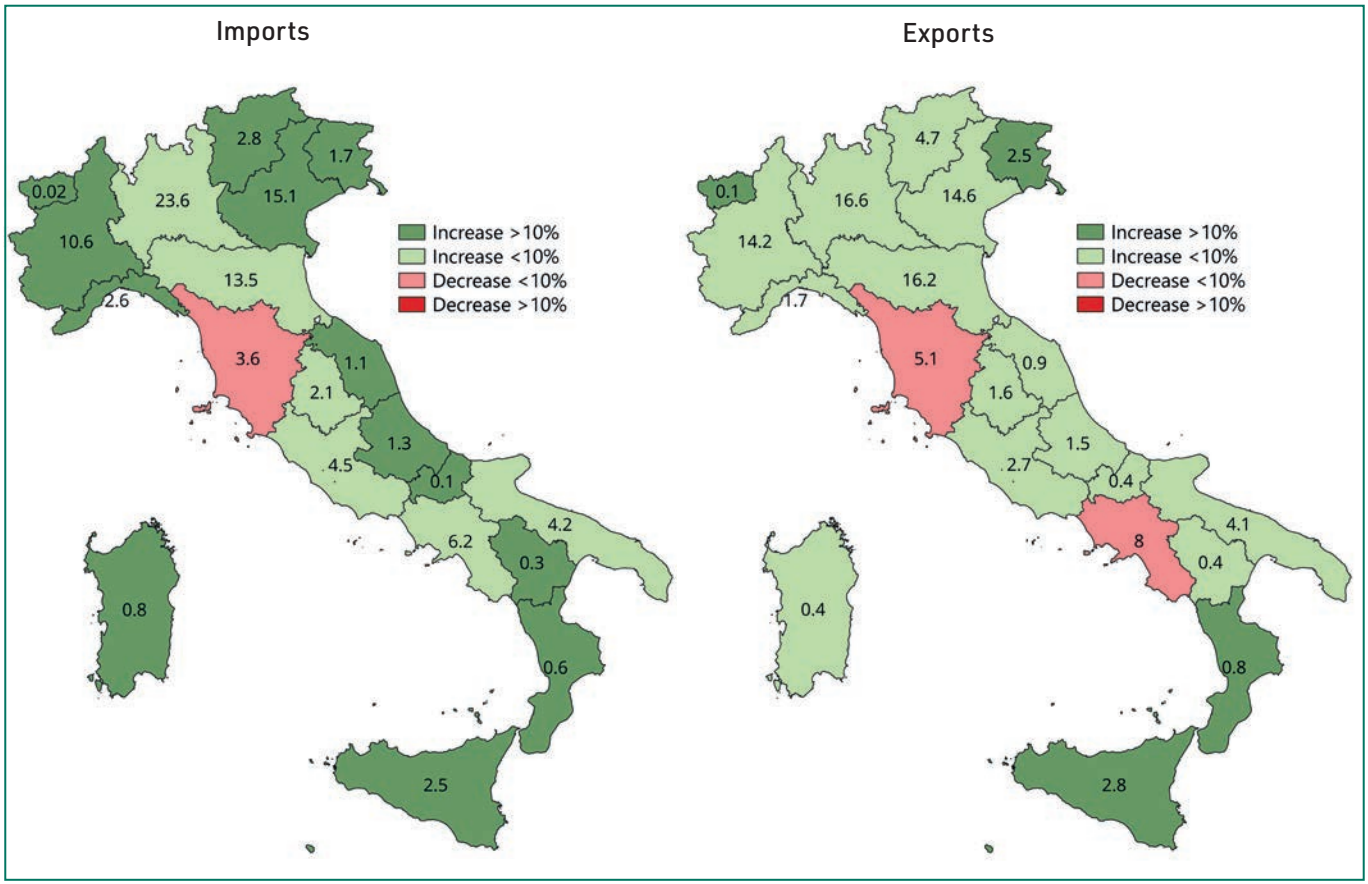
	2025				% Change 2025/2024		
	Imports	Exports	Trade Balance	NTB (%)	Imports	Exports	NTB[(1)]
Piedmont	7,678.3	10,214.7	2,536.3	14.2	27.2	9.1	-7.4
Aosta Valley	16.9	94.0	77.1	69.4	37.5	14.5	-4.4
Lombardy	17,076.1	11,925.8	-5,150.3	-17.8	9.8	8.1	-0.8
Trentino-Alto Adige	2,042.8	3,393.5	1,350.7	24.8	14.0	7.1	-2.9
Veneto	10,948.4	10,550.9	-397.5	-1.8	12.5	5.5	-3.2
Friuli-Venezia Giulia	1,241.8	1,786.4	544.7	18.0	25.6	11.9	-5.5
Liguria	1,865.5	1,205.7	-659.8	-21.5	10.4	6.0	-2.0
Emilia-Romagna	9,774.6	11,689.4	1,914.8	8.9	7.7	9.8	1.0
Tuscany	2,596.7	3,655.6	1,058.9	16.9	-0.4	-7.2	-3.4
Umbria	1,538.6	1,127.7	-410.9	-15.4	8.4	2.2	-2.9
Marche	776.5	630.7	-145.8	-10.4	21.9	7.0	-6.5
Lazio	3,240.5	1,930.6	-1,310.0	-25.3	5.2	8.1	1.3
Abruzzo	948.8	1,065.8	117.0	5.8	20.6	2.8	-7.9
Molise	74.5	309.3	234.8	61.2	49.3	7.2	-9.3
Campania	4,515.4	5,758.8	1,243.3	12.1	8.1	-0.2	-3.9
Apulia	3,049.2	2,986.8	-62.3	-1.0	5.4	3.5	-0.9
Basilicata	186.9	265.2	78.3	17.3	29.5	7.4	-8.9
Calabria	462.2	610.5	148.3	13.8	18.2	10.2	-3.4
Sicily	1,843.5	2,002.6	159.1	4.1	14.8	12.8	-0.9
Sardinia	559.7	273.3	-286.4	-34.4	27.2	1.0	-10.5
ITALY	**72,452.5**	**72,026.9**	**-425.6**	**-0.3**	**10.1**	**5.6**	**-2.1**

[(1)] The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Note: Any difference between the sum of the regions and the Italian total is due to the "Unspecified Regions" category in the ISTAT data.

Source: CREA elaborations based on ISTAT data.

Figure 5.1 Share and change in agri-food trade by region, 2025/2024 (%)



Note: The values shown within each region represent the region's share of Italy's agri-food imports/exports in 2025.

Source: CREA elaborations based on ISTAT data.

for imports, at EUR 10.9 billion, compared with EUR 9.8 billion for Emilia-Romagna, and third for exports, at EUR 10.5 billion; Emilia-Romagna ranked second for exports, at approximately EUR 11.7 billion. Piedmont ranked fourth for both imports (EUR 7.7 billion) and exports (EUR 10.2 billion).

At regional level, Valle d'Aosta (69.4%) and Molise (61.2%) recorded the highest normalised trade balances for agri-food products, while the largest normalised deficits were recorded in Sardinia (-34.4%), Lazio (-25.3%) and Liguria (-21.5%).

Agri-food imports grew particularly strongly in Molise (+49.3%), Valle d'Aosta (+37.5%), Basilicata (+29.5%), Piedmont (+27.2%) and Sardinia (+27.2%), with changes well above the national average (+10.1%). The largest export increases were recorded in Valle d'Aosta (+14.5%), Sicily (+12.8%), Friuli-Venezia Giulia (+11.9%) and Calabria (+10.2%). Among the leading

exporting regions, the excellent results of Piedmont, Lombardy and Emilia-Romagna should also be noted, with increases ranging from 8% to 10%. In Central Italy, Lazio recorded an 8.1% increase in foreign agri-food sales, exceeding the increase in purchases and improving its balance. Among the Islands, Sicily exceeded EUR 2 billion in agri-food exports, following a 12.8% increase compared with 2024. In this case, however, imports grew at a slightly faster rate, resulting in a modest deterioration in the normalised balance. Overall, the change in the normalised agri-food balance between 2024 and 2025 was negative in almost all Italian regions. The only exceptions were Lazio and Emilia-Romagna, which recorded increases of around 1%.

5.2 Regional trade trends by sector and main partner countries

In 2025, Italy recorded a primary-sector trade balance of EUR -15.2 billion, corresponding to a normalised trade balance of -42.9%. This result confirms Italy's dependence on foreign sources for the supply of certain agri-food raw materials and the national system's ability to transform these materials into high-value-added products that are recognised and valued on international markets.

Total exports of primary products exceeded EUR 10 billion in 2025, while imports amounted to EUR 25.3 billion.

In the primary sector, four Italian regions recorded a positive balance. The highest value was observed in Trentino-Alto Adige, at EUR 632.5 million, up from the previous year owing to the marked increase in foreign sales of apples.

Compared with 2024, national primary-sector trade increased for both exports (+9.6%) and, more strongly, imports (+18.2%).

Growth in primary-sector trade was widespread and involved all regions except Umbria, which recorded con-

Table 5.4 Foreign trade in primary sector products by region, 2025 (EUR million)

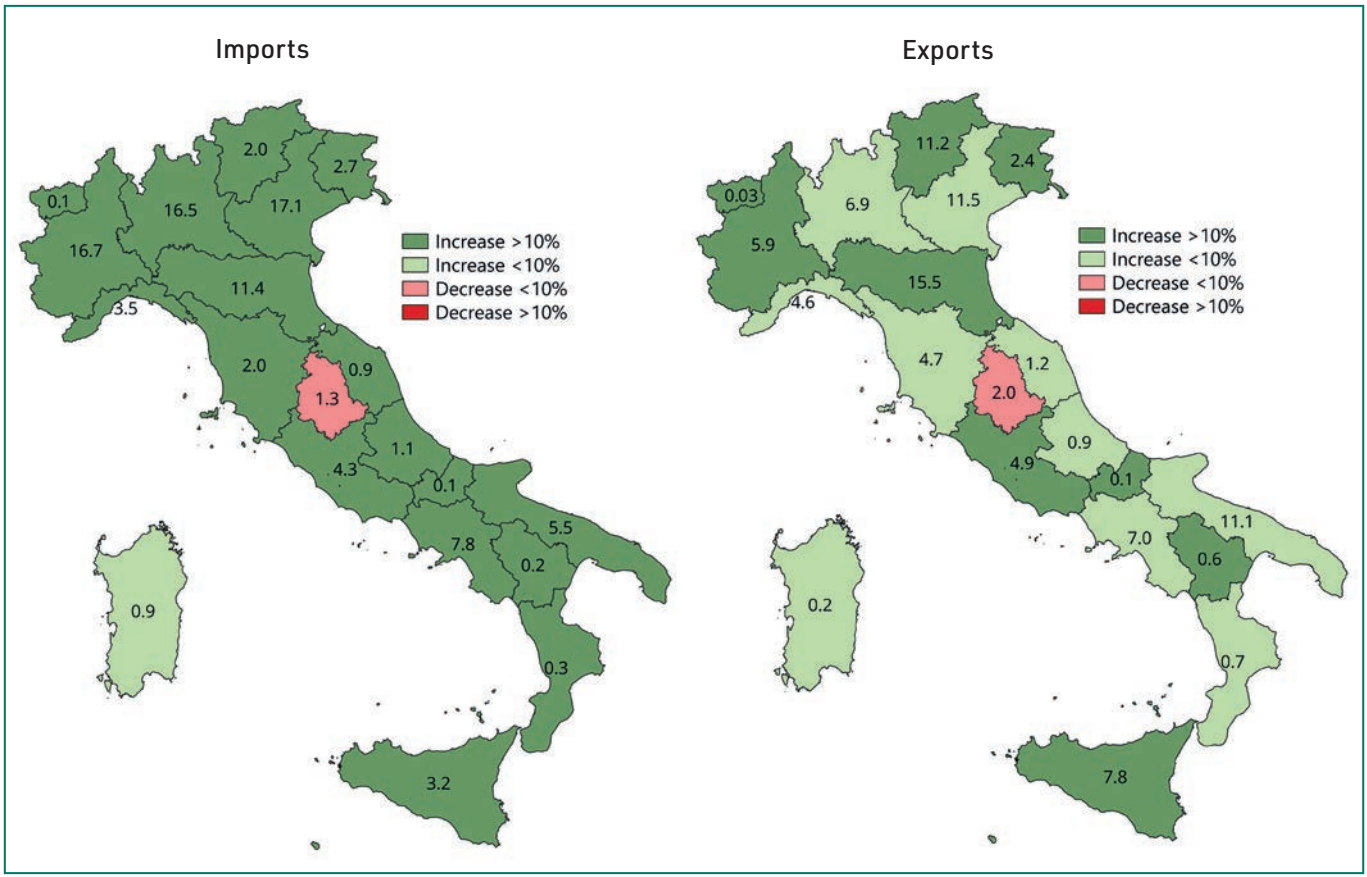
	2025				% Change 2025/2024		
	Imports	Exports	Trade Balance	NTB (%)	Imports	Exports	NTB[1]
Piedmont	4,226.2	596.2	-3,630.0	-75.3	37.2	25.6	-2.0
Aosta Valley	1.5	2.7	1.2	29.5	39.7	121.7	22.2
Lombardy	4,170.4	694.4	-3,476.0	-71.5	14.7	6.9	-1.8
Trentino-Alto Adige	495.1	1,127.5	632.5	39.0	46.9	13.9	-10.2
Veneto	4,328.0	1,165.4	-3,162.6	-57.6	19.1	3.1	-5.0
Friuli-Venezia Giulia	677.2	247.0	-430.1	-46.5	35.5	43.2	2.1
Liguria	878.6	460.0	-418.6	-31.3	29.8	2.5	-11.0
Emilia-Romagna	2,890.5	1,570.4	-1,320.1	-29.6	12.4	17.5	2.0
Tuscany	500.6	472.3	-28.2	-2.9	26.6	3.9	-9.9
Umbria	320.3	200.9	-119.4	-22.9	-3.2	-4.2	-0.5
Marche	219.0	123.5	-95.5	-27.9	33.8	8.9	-9.7
Lazio	1,092.9	492.7	-600.2	-37.9	22.1	19.5	-0.9
Abruzzo	275.0	92.5	-182.5	-49.7	11.7	0.9	-3.9
Molise	12.7	6.3	-6.4	-33.5	34.0	26.9	-2.4
Campania	1,977.7	711.4	-1,266.3	-47.1	10.5	1.7	-3.3
Apulia	1,385.9	1,117.0	-268.9	-10.7	14.0	5.0	-4.0
Basilicata	57.4	65.5	8.1	6.6	19.0	12.3	-2.9
Calabria	72.9	75.0	2.1	1.4	58.6	6.5	-19.6
Sicily	808.4	786.5	-21.8	-1.4	35.8	15.7	-8.0
Sardinia	221.8	15.2	-206.6	-87.2	8.6	1.6	-0.8
ITALY	**25,300.0**	**10,099.7**	**-15,200.3**	**-42.9**	**18.2**	**9.6**	**-3.1**

[1] The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Note: Any difference between the sum of the regions and the Italian total is due to the "Unspecified Regions" category in the ISTAT data.

Source: CREA elaborations based on ISTAT data.

Figure 5.2 Share and change in primary sector trade by region, 2025/2024 (%)



Note: The values shown within each region represent the region's share of Italy's primary-sector imports/exports in 2025.

Source: CREA elaborations based on ISTAT data.

tractions of 3-4%. Emilia-Romagna was the leading region by export value in this sector and recorded strong value growth compared with 2024 (+17.5%), driven by higher fruit sales, especially kiwifruit and apples.

Valle d'Aosta recorded a marked improvement in the normalised balance of its primary sector (+22.2%) compared with 2024, owing to a sharp increase in exports (+121.7%). Friuli-Venezia Giulia and Emilia-Romagna also improved their sector balances, although to a lesser extent, supported by significant export growth of 43.2% and 17.5%, respectively. Regions recording the largest increases in primary-sector exports also included Molise (+26.9%), Piedmont (+25.6%) and Lazio (+19.5%). For Piedmont, higher sales of apples and kiwifruit, the region's two leading primary-sector export products, were decisive. In Lazio, by contrast, growth was associated with exports of hazelnuts and unmanufactured tobacco.

With regard to changes in primary-sector imports compared with 2024, thirteen Italian regions recorded in-

creases above the national average (18.2%). The largest changes were observed in Calabria (+58.6%), Trentino-Alto Adige (+46.9%), Valle d'Aosta (+39.7%), Piedmont (+37.2%), Sicily (+35.8%) and Friuli-Venezia Giulia (+35.5%). Piedmont's imports of primary products exceeded EUR 4.2 billion in 2025. This trend was mainly associated with the above-mentioned increase in import prices for green coffee and raw cocoa, the region's two leading import products; flows of hazelnuts and cattle for rearing also increased sharply, with regional purchases of the latter more than doubling compared with 2024.

Veneto remained the region with the highest value of primary-sector imports, at more than EUR 4.3 billion and an increase of 19%. Here too, higher purchases of cattle for rearing, the region's leading import product, played a role, with their value almost doubling in 2025.

In contrast to the primary sector, the trade balance of the food industry, excluding beverages, recorded a surplus of EUR 5.8 billion in 2025. Exports reached EUR 49.5 billion, up 6.6% compared with 2024, while imports amounted to EUR 43.7 billion (+7.6%).

Eleven regions recorded a positive normalised balance, eight of which posted values above the national average. The highest balances were observed in Molise (67.1%), Valle d'Aosta (46.5%), Piedmont (41.6%) and Friuli-Venezia Giulia (41.3%), although the values clearly differed considerably. Regions that were net importers of pro-

Table 5.5 Foreign trade in food-industry products (excluding beverages) by region, 2025 (EUR million)

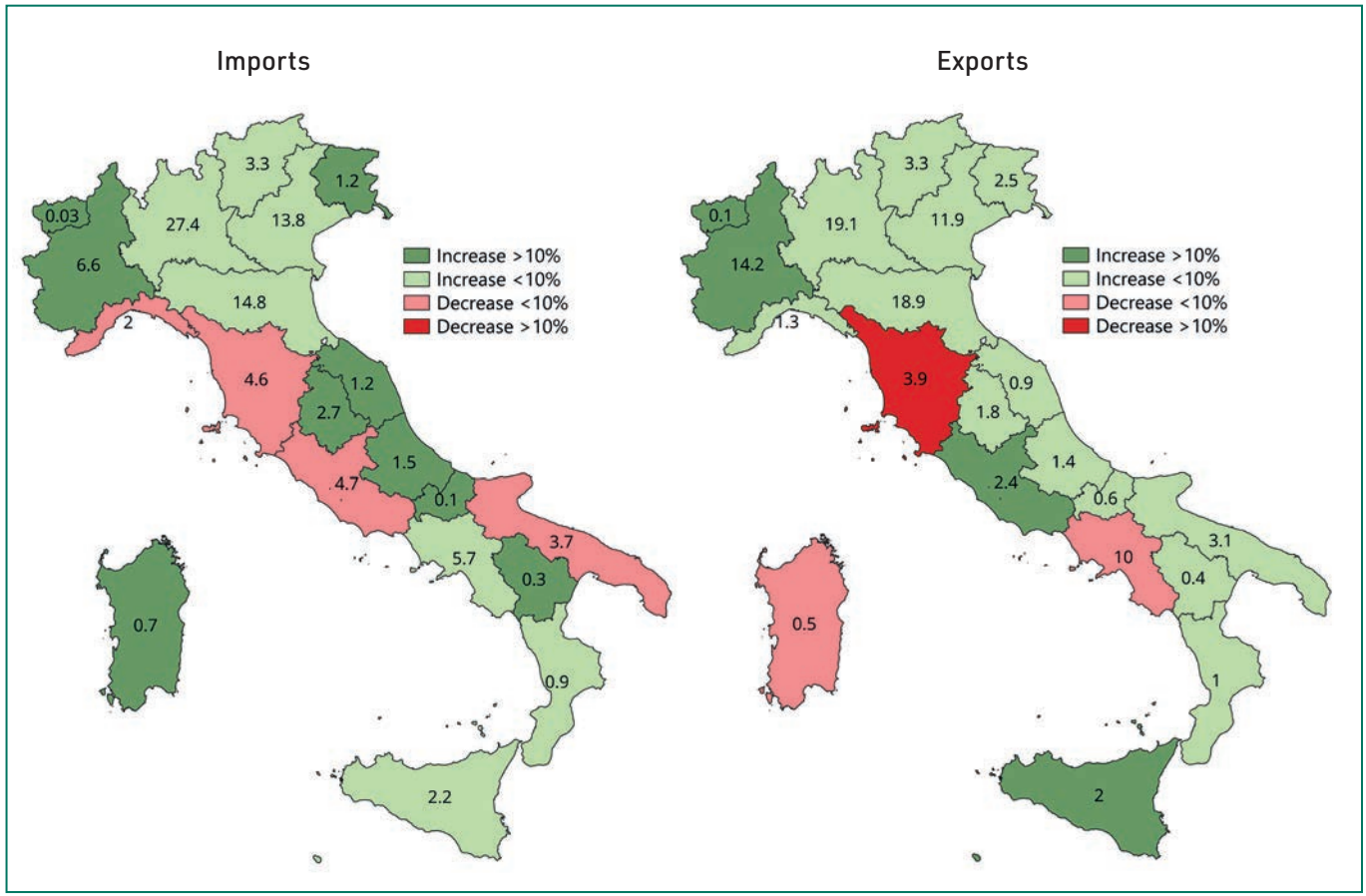
	2025				% Change 2025/2024		
	Imports	Exports	Trade Balance	NTB (%)	Imports	Exports	NTB[(1)]
Piedmont	2,905.5	7,044.1	4,138.6	41.6	15.7	11.6	-1.5
Aosta Valley	11.2	30.6	19.4	46.5	26.0	11.6	-4.6
Lombardy	11,993.6	9,481.8	-2,511.8	-11.7	9.2	9.7	0.2
Trentino-Alto Adige	1,444.3	1,636.0	191.7	6.2	6.1	8.3	1.0
Veneto	6,022.8	5,912.1	-110.7	-0.9	6.9	8.5	0.7
Friuli-Venezia Giulia	518.2	1,247.4	729.1	41.3	13.5	7.5	-2.2
Liguria	890.0	648.4	-241.6	-15.7	-2.6	7.2	4.6
Emilia-Romagna	6,485.7	9,366.9	2,881.2	18.2	7.9	9.3	0.6
Tuscany	2,003.4	1,941.6	-61.8	-1.6	-6.4	-13.1	-3.7
Umbria	1,201.2	875.8	-325.4	-15.7	11.5	2.5	-4.1
Marche	523.6	429.6	-94.0	-9.9	15.5	5.2	-4.6
Lazio	2,033.9	1,171.3	-862.6	-26.9	-1.8	10.0	5.2
Abruzzo	653.7	691.0	37.4	2.8	23.3	6.3	-7.4
Molise	57.8	293.3	235.5	67.1	47.0	7.6	-7.7
Campania	2,485.5	4,950.8	2,465.3	33.2	5.9	-0.9	-2.9
Apulia	1,624.2	1,535.1	-89.1	-2.8	-1.6	1.0	1.3
Basilicata	122.8	194.5	71.7	22.6	33.5	4.7	-11.2
Calabria	374.5	515.7	141.2	15.9	9.7	9.7	0.0
Sicily	960.2	995.7	35.5	1.8	1.4	11.7	4.8
Sardinia	316.7	225.0	-91.6	-16.9	42.6	-0.7	-18.0
ITALY	**43,738.2**	**49,550.4**	**5,812.3**	**6.2**	**7.6**	**6.6**	**-0.5**

(1) The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Note: Any difference between the sum of the regions and the Italian total is due to the "Unspecified Regions" category in the ISTAT data.

Source: CREA elaborations based on ISTAT data.

Figure 5.3 Share and change in food-industry trade (excluding beverages) by region, 2025/2024 (%)



Note: The values shown within each region represent the region's share of Italy's food-industry imports/exports (excluding beverages) in 2025.

Source: CREA elaborations based on ISTAT data.

cessed food products included Lazio (-26.9%), Sardinia (-16.9%), Liguria (-15.7%) and Umbria (-15.7%).

Lombardy remained the leading region by value of food-industry trade, with imports of approximately EUR 12 billion and exports of EUR 9.5 billion. Emilia-Romagna followed, with imports of EUR 6.5 billion and exports of EUR 9.4 billion.

Piedmont recorded the largest food-industry trade surplus in absolute terms, at EUR 4.14 billion, with exports of more than EUR 7 billion and imports of EUR 2.9 billion. The region's sector exports increased by 11.6% in value compared with 2024, driven by higher exports of cocoa-based confectionery and roasted coffee, although these increases were linked to the price component. Among Southern regions, Campania recorded a high normalised trade balance (33.2%), supported by food exports of EUR 4.9 billion. However, the region's sector exports declined slightly (-0.9%), while imports in-

creased (+5.9%). The contraction in Campania's exports was mainly attributable to lower sales of preserved tomatoes, also affected by the decline in average unit export value. On the import side, higher purchases of fish products and vegetable oils played a role.
In addition to Campania, Sardinia and, especially, Tuscany were exceptions to the widespread increase in food-industry exports in 2025. The decline in Tuscany was particularly substantial (-13.1%) and was associated with the decrease in the value of extra virgin olive oil exports (-26.3%), the region's leading export product. This result was affected by higher tariffs in the US market, the principal destination for the region's agri-food exports and, in particular, olive oil. It should nevertheless be noted that the decline in regional sales of this product to the United States was smaller in volume than in value. More generally, lower export prices negatively affected the value of regional olive oil sales in many of the principal destination markets, despite frequently positive trends in quantities sold, which increased overall by 8% in 2025.
Increases in food-industry exports involved all Northern regions and much of Central and Southern Italy. The highest percentage growth was observed in Sicily (+11.7%), where exports reached EUR 995.7 million in 2025. This reflected the sharp regional increase in foreign sales of jams and other prepared and preserved fruit (+74.4% in value). Lazio also recorded positive

Table 5.6 Foreign Trade in Beverages by Region in 2025 (EUR Million)

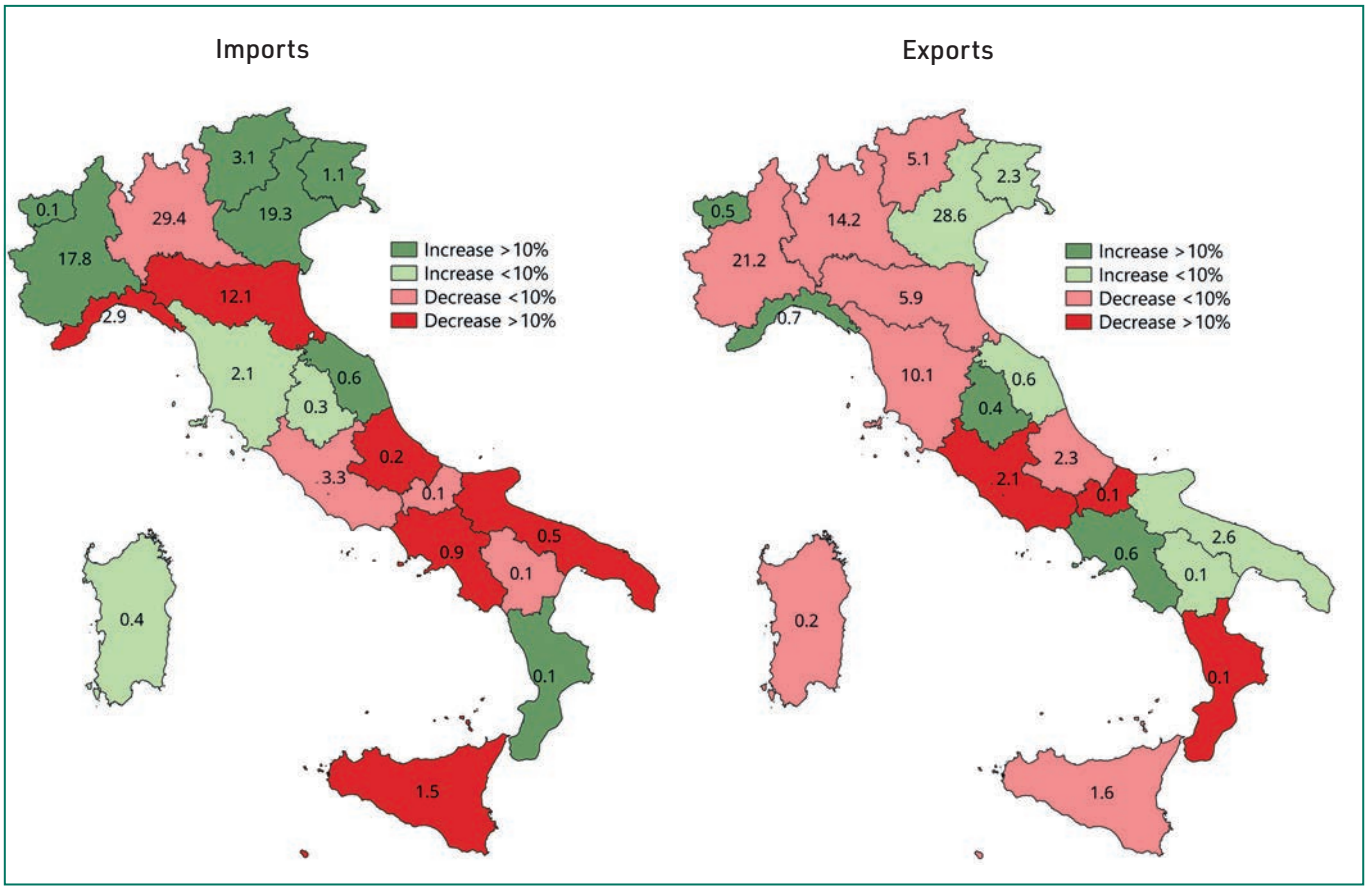
	2025				% Change 2025/2024		
	Imports	Exports	Trade Balance	NTB (%)	Imports	Exports	NTB[(1)]
Piedmont	517.1	2,547.1	2,030.1	66.3	18.5	-0.8	-4.7
Aosta Valley	2.5	59.7	57.1	91.9	18.8	11.8	-0.5
Lombardy	855.0	1,702.9	847.9	33.1	-5.5	-1.9	1.7
Trentino-Alto Adige	90.9	618.5	527.7	74.4	10.7	-6.9	-3.6
Veneto	559.2	3,437.3	2,878.1	72.0	24.2	0.5	-4.7
Friuli-Venezia Giulia	32.0	277.2	245.3	79.3	16.7	5.8	-1.8
Liguria	83.7	85.7	2.1	1.2	-11.7	10.9	11.4
Emilia-Romagna	352.2	711.2	359.0	33.8	-26.6	-3.4	12.7
Tuscany	59.9	1,215.1	1,155.2	90.6	2.1	-2.3	-0.4
Umbria	10.1	45.5	35.4	63.5	5.8	18.4	3.5
Marche	18.4	67.2	48.7	56.9	11.4	2.1	-2.9
Lazio	96.2	252.5	156.3	44.8	-8.4	-17.6	-4.2
Abruzzo	7.2	272.6	265.4	94.9	-15.1	-7.3	0.5
Molise	0.5	6.4	6.0	86.3	-5.3	-39.6	-4.7
Campania	27.5	74.1	46.6	45.8	-12.4	10.9	9.8
Apulia	15.9	308.6	292.7	90.2	-14.1	3.2	1.9
Basilicata	3.3	2.7	-0.5	-8.9	-6.0	5.9	5.9
Calabria	2.4	11.1	8.7	64.7	20.4	-10.3	-7.8
Sicily	44.4	191.4	147.0	62.4	-22.4	-4.0	6.9
Sardinia	11.8	25.4	13.6	36.6	5.9	-9.4	-6.6
ITALY	**2,904.5**	**12,018.3**	**9,113.7**	**61.1**	**-2.5**	**-2.7**	**-0.1**

[(1)] The change in the Normalised Trade Balance (NTB) is calculated as a simple difference.

Note: Any difference between the sum of the regions and the Italian total is due to the "Unspecified Regions" category in the ISTAT data.

Source: CREA elaborations based on ISTAT data.

Figure 5.4 Share and change in beverage trade by region, 2025/2024 (%)



Note: The values shown within each region represent the region's share of Italy's beverage imports/exports in 2025.

Source: CREA elaborations based on ISTAT data.

growth, with a 10% increase bringing export value to more than EUR 1.1 billion.

The increase in food-industry imports was also widespread, with only four exceptions: Liguria, Tuscany, Lazio and Apulia. In Apulia and Tuscany, the trend was affected by the above-mentioned decline in olive oil prices, which reduced the value of imports.

The largest percentage increases in sector imports were recorded in Molise (+47%), Sardinia (+42.6%) and Basilicata (+33.5%). In absolute terms, Lombardy recorded the largest increase, importing EUR 1 billion more in food-industry products than in 2024. This trend was influenced by prices for cocoa derivatives, the region's leading import item, whose value increased by more than 50% compared with 2024 despite broadly stable purchase volumes.

In 2025, the beverage sector maintained a substantial trade surplus of more than EUR 9 billion, although this was slightly lower than in 2024.

Beverage imports in 2025 amounted to EUR 2.9 billion,

compared with approximately EUR 12 billion in exports. Almost three quarters of the total value of Italian beverage exports originated in four regions: Veneto (EUR 3.4 billion), Piedmont (EUR 2.5 billion), Lombardy (EUR 1.7 billion) and Tuscany (EUR 1.2 billion).

On the beverage import side, the Northern regions accounted for 85.6% of the national total. Lombardy was the leading importing region, at EUR 855 million, followed by Veneto (EUR 559.2 million), Piedmont (EUR 517.1 million) and Emilia-Romagna (EUR 352.2 million).

Compared with 2024, foreign beverage trade recorded modest declines in both flows: imports decreased by 2.5%, while exports fell by 2.7%.

With regard to sector imports, Veneto and Piedmont recorded the largest increases, both in relative and absolute terms. In Veneto, foreign purchases of beverages rose by 24.2% to EUR 559.2 million, while in Piedmont they increased by 18.5% to more than EUR 517 million. In Veneto, the increase was supported mainly by higher beer purchases, which rose by more than 30% in both value and quantity. In Piedmont, by contrast, liqueurs drove the increase in beverage imports.

Among the leading importing regions, Emilia-Romagna recorded the sharpest contraction (-26.6%): imports fell from approximately EUR 480 million in 2024 to EUR 352.2 million in 2025. This trend was associated, at least in part, with lower foreign purchases of liqueurs.

Among the leading exporting regions, Veneto was the only one to record slight growth in foreign beverage sales (+0.5%). Piedmont (-0.8%), Lombardy (-1.9%) and Tuscany (-2.3%) recorded modest contractions, although these did not significantly alter their role as the sector's leading exporting areas. Beverage export trends in Lombardy differed by product: sales of mineral water increased, including to the United States, while liqueur sales declined markedly. In Veneto, growth in PDO still-wine exports offset the decline in other categories, such as semi-sparkling wines. In Tuscany, by contrast, the reduction in export value was mainly associated with PDO red wines, although their foreign sales volumes increased slightly.

Umbria recorded the largest percentage increase in beverage exports (+18.4%), reaching EUR 45.5 million, with an excellent performance by carbonated soft drinks. In the South, beverage exports from Apulia increased (+3.2%) to more than EUR 300 million, driven by PDO and PGI red wines and, above all, by the sharp increase in foreign beer sales.

The trends described were also affected by the new US trade policy, which, as already noted, caused flows to contract in 2025 towards a strategic market of major importance to the Italian agri-food sector. To provide a clearer understanding of these developments, the maps in Figure 5.5 show changes over the latest year in Italian exports to the United States for the food and beverage industries, which account for almost all Italian agri-food flows to the US market. Changes are considered over the full year in order to assess the overall effect of the developments that characterised 2025: a generally positive first half, also supported by advance purchases by US importers in a climate of uncertainty, followed by a declining second half marked by the full application of higher tariffs. In addition to the changes, the maps indicate the share of the US market in the regional exports of the two sectors, which is useful for understanding regional export dependence on this market and the potentially greater impact of the tariff increase.

With regard to the food industry, eight regions recorded a decline in the value of exports to the United States in 2025. These were regions in Central and Southern Italy, with Veneto as the sole exception. The sharpest decline concerned Tuscany (-30%), which directs approximately 24% of its food-industry exports to the US market. These exports consist predominantly of olive oil: in 2024, more than 40% of the region's exports of this product were directed to the United States and, despite the sharp contraction, the US market retained a significant share of 37% in 2025. It should nevertheless be considered that the price effect had a substantial impact on olive oil in 2025; consequently, the reduction in volumes exported from Tuscany to the United States was very limited, while the region's total quantity of oil sold abroad increased by more than 10%.

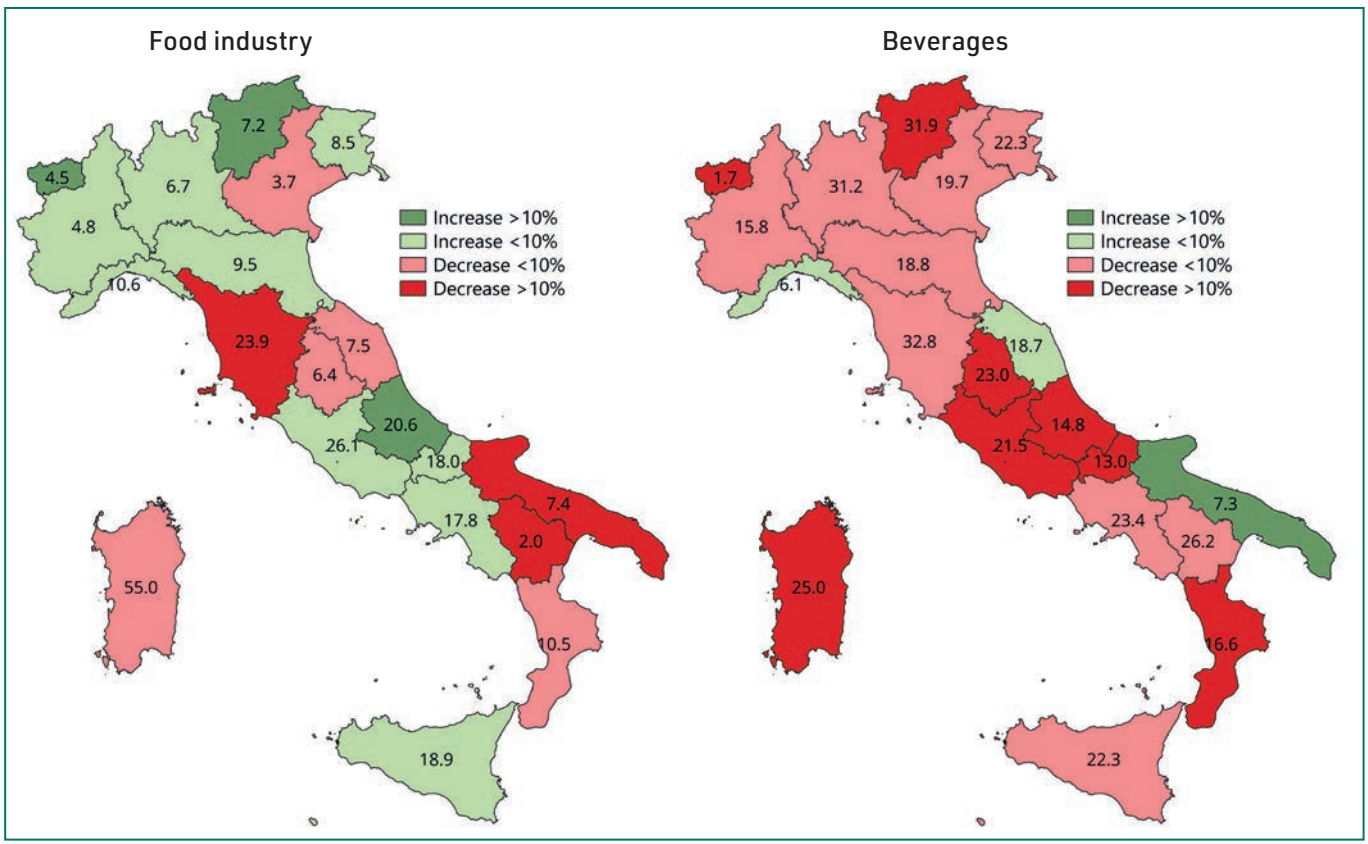
The United States accounted for more than 50% of Sardin-

ia's food-industry exports, consisting mainly of Pecorino and Fiore Sardo cheeses, 85% of which were destined for the US market. Despite the tariff increase, the contraction in regional flows of these products to the US market, like that of the food industry as a whole, was limited to less than 5%.

By contrast, Abruzzo's food-industry exports to the United States increased by more than 10%, owing to the excellent sales performance of processed and prepared vegetables, as well as biscuit and bakery products.

Compared with the food industry, beverage export performance in the US market was weaker. The United States was the leading destination for beverage exports both for Italy as a whole and for more than half of the Italian regions, with a share exceeding 20% in several cases. In 2025, the value of beverage exports to the United States declined in every region except Liguria, Marche and Apulia. For Apulia, the United States accounted for

Figure 5.5 Share of the US market and change in Italy's exports to the United States, food and beverage industries, 2025/2024 (%)



Note: The values shown within each region represent the share of the United States in regional exports of food-industry and beverage products in 2025.

Source: CREA elaborations based on ISTAT data.

only 7.3% of regional beverage exports; nevertheless, the region recorded strong performances in PDO and PGI red wines and, especially, PDO white wines.
At national level, wine accounted for almost 70% of the value of beverage exports to the United States; three quarters of this value was concentrated in four regions: Veneto, Lombardy, Piedmont and Emilia-Romagna. In 2025, all four recorded contractions, ranging from -6% in Veneto to -29% in Emilia-Romagna. In Lombardy and Emilia-Romagna, however, the principal beverage export item to the United States was not wine but mineral water. Growth in mineral-water sales, in both value and volume, helped contain the overall decline in regional beverage exports to the United States, which remained below 10% in both regions.

Piedmont: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	596.2	5.9	25.6	8
Food Industry	7,044.1	14.2	11.6	3
Beverages	2,547.1	21.2	-0.8	2
Food and Beverage Industry	9,591.2	15.6	8.0	3
TOTAL AGRI-FOOD TRADE	10,214.7	14.2	9.1	4
TOTAL TRADE	61,790.1	9.6	2.7	4
IMPORTS				
Primary Sector	4,226.2	16.7	37.2	2
Food Industry	2,905.5	6.6	15.7	4
Beverages	517.1	17.8	18.5	3
Food and Beverage Industry	3,422.6	7.3	16.2	4
TOTAL AGRI-FOOD TRADE	7,678.3	10.6	27.2	4
TOTAL TRADE	46,302.1	7.8	5.0	5

TOP 5 PRODUCTS					
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Cocoa-Based Products	na	na	Green Coffee	na	na
Roasted Coffee, Not Decaffeinated	na	na	Cocoa-Based Products	7.2	9.6
Other Spirits	8.3	4.8	Raw Cocoa	na	na
Biscuits and Pastry Products	8.2	1.6	Hazelnuts	4.7	24.4
Rice	3.9	-4.5	Cattle for Breeding	4.4	176.8

TOP 5 TRADING PARTNERS					
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
France	14.8	1.9	France	16.6	28.3
Germany	14.5	5.7	Brazil	8.9	50.1
United States	7.4	-1.8	Germany	7.7	23.7
United Kingdom	6.0	0.4	Netherlands	6.7	41.0
Poland	5.2	25.1	Spain	5.7	17.1

Aosta Valley: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	2.7	0.03	121.7	20
Food Industry	30.6	0.1	11.6	20
Beverages	59.7	0.5	11.8	15
Food and Beverage Industry	90.3	0.1	11.8	20
TOTAL AGRI-FOOD TRADE	94.0	0.1	14.5	20
TOTAL TRADE	770.3	0.1	-6.3	20
IMPORTS				
Primary Sector	1.5	0.006	39.7	20
Food Industry	11.2	0.03	26.0	20
Beverages	2.5	0.1	18.8	18
Food and Beverage Industry	13.7	0.03	24.6	20
TOTAL AGRI-FOOD TRADE	16.9	0.02	37.5	20
TOTAL TRADE	421.0	0.1	-15.7	20

TOP 5 PRODUCTS					
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Mineral Water	na	na	Malt and Malt Extracts	na	na
Curd and Other Fresh Cheeses	na	na	Other Spirits	na	na
Other Spirits	na	na	Frozen Crustaceans and Molluscs	na	na
Outdoor Plants	na	na	Beef: Fresh or Chilled Semi-Processed Cuts.	na	na
Semi-Hard Cheeses	na	na	Bulk Liquid Milk	na	na

TOP 5 TRADING PARTNERS					
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
France	73.7	17.5	Germany	26.7	77.8
Switzerland	13.1	16.5	France	19.5	-32.2
United States	2.6	11.4	Spain	12.9	51.5
Netherlands	1.8	-46.9	Netherlands	8.5	185.0
Austria	1.2	221.2	Panama	6.9	16.9

Note: Any discrepancy between the sum of the sectors and the total agri-food value is due to "Other agri-food products (below the threshold: 1-24)", which are not allocated to a specific sector.
na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Lombardy: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	694.4	6.88	6.9	7
Food Industry	9,481.8	19.1	9.7	1
Beverages	1,702.9	14.2	-1.9	3
Food and Beverage Industry	11,184.7	18.2	7.8	1
TOTAL AGRI-FOOD TRADE	11,925.8	16.6	8.1	1
TOTAL TRADE	167,082.2	26.0	1.8	1
IMPORTS				
Primary Sector	4,170.4	16.5	14.7	3
Food Industry	11,993.6	27.4	9.2	1
Beverages	855.0	29.4	-5.5	1
Food and Beverage Industry	12,848.7	27.5	8.1	1
TOTAL AGRI-FOOD TRADE	17,076.1	23.6	9.8	1
TOTAL TRADE	178,950.4	30.2	3.9	1

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Cocoa-Based Products	9.8	33.5	Cocoa-Based Products.	6.2	53.2
Mineral Water	na	na	Processed Fish	5.9	0.7
Biscuits and Pastry Products	5.4	5.3	Dog and Cat Food	3.3	5.7
Curd and Other Fresh Cheeses	5.0	10.7	Frozen Crustaceans and Molluscs	2.9	8.1
Grana Padano and Parmigiano Reggiano	4.4	20.7	Oilseed Cakes and Animal Feed	2.7	8.1

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
France	13.8	10.9	France	14.5	7.6
Germany	10.4	9.3	Netherlands	11.8	16.5
United States	9.8	-1.3	Germany	11.5	10.9
United Kingdom	7.3	4.6	Spain	11.1	0.8
Spain	6.1	20.8	Belgium	4.1	9.5

Trentino-Alto Adige: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	1,127.5	11.2	13.9	3
Food Industry	1,636.0	3.3	8.3	7
Beverages	618.5	5.1	-6.9	6
Food and Beverage Industry	2,254.5	3.7	3.7	7
TOTAL AGRI-FOOD TRADE	3,393.5	4.7	7.1	7
TOTAL TRADE	12,836.6	2.0	-0.9	10
IMPORTS				
Primary Sector	495.1	2.0	46.9	12
Food Industry	1,444.3	3.3	6.1	9
Beverages	90.9	3.1	10.7	6
Food and Beverage Industry	1,535.2	3.3	6.4	9
TOTAL AGRI-FOOD TRADE	2,042.8	2.8	14.0	9
TOTAL TRADE	10,367.1	1.7	10.2	12

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Apples	23.6	15.5	Sugar and Other Sugar-Producing Prod.	na	na
Biscuits and Pastry Products	na	na	Fresh or Chilled Semi-Processed Pork	9.2	-11.1
Prepared or Preserved Fruit	7.7	5.0			
Packaged PDO White Wines	6.2	-4.9	Green Coffee	na	na
Fruit Juices	5.4	17.4	Fresh or Chilled Boneless Pork	5.0	-21.8
			Bakery Products	3.5	11.9

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	25.6	4.1	Germany	34.3	-0.8
United States	9.3	-3.5	Austria	15.6	-5.9
Austria	6.4	0.5	Netherlands	10.6	26.5
United Kingdom	5.9	2.7	France	7.5	63.5
Spain	5.7	1.8	Spain	7.2	78.3

Note: Any discrepancy between the sum of the sectors and the total agri-food value is due to "Other agri-food products (below the threshold: 1-24)", which are not allocated to a specific sector.
na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Veneto: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	1,165.4	11.5	3.1	2
Food Industry	5,912.1	11.9	8.5	4
Beverages	3,437.3	28.6	0.5	1
Food and Beverage Industry	9,349.3	15.2	5.4	4
TOTAL AGRI-FOOD TRADE	10,550.9	14.6	5.5	3
TOTAL TRADE	79,972.5	12.4	-0.2	3
IMPORTS				
Primary Sector	4,328.0	17.1	19.1	1
Food Industry	6,022.8	13.8	6.9	3
Beverages	559.2	19.3	24.2	2
Food and Beverage Industry	6,582.0	14.1	8.2	3
TOTAL AGRI-FOOD TRADE	10,948.4	15.1	12.5	2
TOTAL TRADE	64,193.0	10.8	8.0	2

TOP 5 PRODUCTS				
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Other PDO Sparkling Wines	11.9	-3.0	Cattle for Breeding	8.3	93.2
Biscuits and Pastry Products	4.4	7.6	Soybeans	na	na
Filled Pasta	4.0	11.5	Processed Fish	3.8	4.2
Packaged PDO White Wines	3.9	7.1	Semi-Hard Cheeses	3.2	3.4
Oilseed Cakes and Animal Feed	3.8	5.8	Malt Beer	2.9	32.6

TOP 5 TRADING PARTNERS				
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	19.8	7.4	Germany	18.8	9.5
United States	8.5	-3.6	France	16.0	36.4
France	8.1	8.6	Netherlands	9.2	16.2
United Kingdom	7.3	3.6	Spain	8.8	9.4
Austria	5.9	8.4	Austria	5.4	11.1

Friuli-Venezia Giulia: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	247.0	2.4	43.2	12
Food Industry	1,247.4	2.5	7.5	9
Beverages	277.2	2.3	5.8	8
Food and Beverage Industry	1,524.6	2.5	7.2	9
TOTAL AGRI-FOOD TRADE	1,786.4	2.5	11.9	11
TOTAL TRADE	20,270.8	3.2	17.8	8
IMPORTS				
Primary Sector	677.2	2.7	35.5	10
Food Industry	518.2	1.2	13.5	15
Beverages	32.0	1.1	16.7	10
Food and Beverage Industry	550.2	1.2	13.7	14
TOTAL AGRI-FOOD TRADE	1,241.8	1.7	25.6	13
TOTAL TRADE	11,284.4	1.9	10.5	10

TOP 5 PRODUCTS				
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Roasted Coffee, Not Decaff.	na	na	Green Coffee	na	na
Bakery Products	na	na	Wood, Cork, and Bamboo	5.8	-1.0
Non-Egg, Unfilled Pasta	6.6	-14.2	Curd and Other Fresh Cheeses	4.5	4.7
Biscuits and Pastry Products	5.8	0.8	Seed Oils and Vegetable Fats	na	na
Other PDO Sparkling Wines	4.8	12.2	Common Wheat and Spelt	4.0	-11.6

TOP 5 TRADING PARTNERS				
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	17.6	21.3	Brazil	12.5	62.6
United States	9.5	0.5	Germany	9.2	21.3
France	7.3	10.9	Slovenia	9.1	1.9
Austria	7.0	13.9	Netherlands	8.3	91.8
United Kingdom	4.9	22.8	France	7.9	68.0

Note: Any discrepancy between the sum of the sectors and the total agri-food value is due to "Other agri-food products (below the threshold: 1-24)", which are not allocated to a specific sector.
na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Liguria: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	460.0	4.6	2.5	11
Food Industry	648.4	1.3	7.2	14
Beverages	85.7	0.7	10.9	12
Food and Beverage Industry	734.1	1.2	7.6	14
TOTAL AGRI-FOOD TRADE	1,205.7	1.7	6.0	12
TOTAL TRADE	9,418.6	1.5	10.2	14
IMPORTS				
Primary Sector	878.6	3.5	29.8	8
Food Industry	890.0	2.0	-2.6	12
Beverages	83.7	2.9	-11.7	7
Food and Beverage Industry	973.6	2.1	-3.4	12
TOTAL AGRI-FOOD TRADE	1,865.5	2.6	10.4	10
TOTAL TRADE	13,097.4	2.2	-0.1	9

TOP 5 PRODUCTS				
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Extra Virgin Olive Oil	na	na	Green Coffee	14.9	87.1
Fresh Cut Foliage	8.9	0.9	Extra Virgin Olive Oil	10.9	-4.3
Outdoor Plants	6.9	39.2	Processed Fish	8.2	-9.2
Meat Extracts, Soups, and Sauces	6.5	-4.8	Bananas	4.8	-14.2
Kiwifruit	na	na	Kiwifruit	na	na

TOP 5 TRADING PARTNERS				
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	16.0	0.3	Spain	16.0	-2.6
France	15.8	-3.8	Belgium	6.8	250.7
Netherlands	10.8	0.9	Netherlands	6.5	41.5
United States	8.5	-3.1	Malaysia	5.9	-15.0
Spain	8.0	23.3	Germany	4.8	21.3

Emilia-Romagna: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	1,570.4	15.5	17.5	1
Food Industry	9,366.9	18.9	9.3	2
Beverages	711.2	5.9	-3.4	5
Food and Beverage Industry	10,078.1	16.4	8.3	2
TOTAL AGRI-FOOD TRADE	11,689.4	16.2	9.8	2
TOTAL TRADE	84,254.1	13.1	1.3	2
IMPORTS				
Primary Sector	2,890.5	11.4	12.4	4
Food Industry	6,485.7	14.8	7.9	2
Beverages	352.2	12.1	-26.6	4
Food and Beverage Industry	6,837.9	14.7	5.4	2
TOTAL AGRI-FOOD TRADE	9,774.6	13.5	7.7	3
TOTAL TRADE	51,006.2	8.6	7.3	4

TOP 5 PRODUCTS				
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Preserved and Peeled Tomatoes	7.5	2.0	Seed Oils and Vegetable Fats	9.0	31.6
Grana Padano and Parmigiano Reggiano	7.4	18.0	Fresh or Chilled Semi-Proces. Pork	8.6	-8.6
Other Prepared Pork Products	5.5	3.3	Oilseed Cakes and Animal Feed	5.0	-11.8
Non-Egg, Unfilled Pasta	4.3	-9.4	Soybeans	na	na
Bakery Products	3.9	14.4	Processed Fish	4.1	18.0

TOP 5 TRADING PARTNERS				
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	14.9	8.0	Germany	10.2	13.9
France	13.6	11.7	Spain	10.2	-2.2
United States	8.9	4.4	Netherlands	8.9	10.7
United Kingdom	6.5	3.1	France	8.3	11.6
Spain	4.7	14.2	Ukraine	5.4	21.7

Note: Any discrepancy between the sum of the sectors and the total agri-food value is due to "Other agri-food products (below the threshold: 1-24)", which are not allocated to a specific sector.
na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Tuscany: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	472.3	4.7	3.9	10
Food Industry	1,941.6	3.9	-13.1	6
Beverages	1,215.1	10.1	-2.3	4
Food and Beverage Industry	3,156.6	5.1	-9.2	6
TOTAL AGRI-FOOD TRADE	3,655.6	5.1	-7.2	6
TOTAL TRADE	76,312.1	11.9	21.3	4
IMPORTS				
Primary Sector	500.6	2.0	26.6	11
Food Industry	2,003.4	4.6	-6.4	7
Beverages	59.9	2.1	2.1	8
Food and Beverage Industry	2,063.3	4.4	-6.1	7
TOTAL AGRI-FOOD TRADE	2,596.7	3.6	-0.4	8
TOTAL TRADE	56,587.3	9.6	38.1	3

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Extra Virgin Olive Oil	23.4	-26.3	Extra Virgin Olive Oil	28.4	-17.2
Packaged PDO Red and Rosé Wines	16.4	-6.2	Leather and Hides	9.7	8.7
Outdoor Plants	9.5	3.8	Frozen Crustac. and Molluscs	5.0	-4.4
Packaged PGI Red and Rosé Wines	7.5	4.0	Processed Fish	4.0	13.4
Other Olive Oil	4.7	-28.9	Other Olive Oil	2.8	-21.5

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
United States	23.7	-20.4	Spain	28.6	-9.2
Germany	15.1	4.1	France	9.9	20.3
France	9.4	-11.4	Greece	8.9	26.3
Canada	5.5	-8.2	Netherlands	8.7	19.3
United Kingdom	5.0	-14.5	Tunisia	4.8	-30.7

Umbria: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	200.9	2.0	-4.2	13
Food Industry	875.8	1.8	2.5	12
Beverages	45.5	0.4	18.4	16
Food and Beverage Industry	921.3	1.5	3.2	13
TOTAL AGRI-FOOD TRADE	1,127.7	1.6	2.2	13
TOTAL TRADE	5,810.9	0.9	-1.0	16
IMPORTS				
Primary Sector	320.3	1.3	-3.2	13
Food Industry	1,201.2	2.7	11.5	10
Beverages	10.1	0.3	5.8	15
Food and Beverage Industry	1,211.3	2.6	11.5	10
TOTAL AGRI-FOOD TRADE	1,538.6	2.1	8.4	12
TOTAL TRADE	4,585.2	0.8	5.4	16

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Extra Virgin Olive Oil	18.0	-12.9	Extra Virgin Olive Oil	25.8	-6.6
Raw Tobacco	14.9	-1.6	Cocoa-Based Products.	na	na
Cocoa-Based Products.	na	na	Seed Oils and Vegetable Fats	na	na
Margarine	na	na	Raw Tobacco	6.6	-11.5
Confectionery and Chewing Gum	6.8	46.9	Other Olive Oil	2.0	-37.3

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Spain	12.6	82.0	Spain	24.1	-16.5
Germany	11.5	-5.9	France	11.0	30.1
France	7.4	-10.3	Portugal	9.4	68.5
Belgium	7.2	-2.9	Germany	9.2	7.3
United States	6.9	-9.6	Greece	7.1	25.4

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na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Marche: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	123.5	1.2	8.9	14
Food Industry	429.6	0.9	5.2	16
Beverages	67.2	0.6	2.1	14
Food and Beverage Industry	496.8	0.8	4.8	16
TOTAL AGRI-FOOD TRADE	630.7	0.9	7.0	15
TOTAL TRADE	13,429.9	2.1	-7.6	9
IMPORTS				
Primary Sector	219.0	0.9	33.8	16
Food Industry	523.6	1.2	15.5	14
Beverages	18.4	0.6	11.4	12
Food and Beverage Industry	542.0	1.2	15.4	15
TOTAL AGRI-FOOD TRADE	776.5	1.1	21.9	15
TOTAL TRADE	8,511.9	1.4	-1.4	13

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Other Fresh or Chilled Fish	6.3	9.7	Processed Fish	18.8	29.7
Semi-Processed Poultry Meat	na	na	Frozen Crustac. and Molluscs	12.0	20.6
Roasted Coffee, Not Decaffeinated	5.9	13.0	Wool and Raw Hides (Not Carded)	na	na
Bakery Products	5.5	-4.8			
Fresh or Chilled Crustac. and Molluscs	5.2	6.7	Green Coffee	3.8	68.8
			Semi-Hard Cheeses	na	na

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	13.4	7.8	Spain	12.5	16.9
Spain	12.9	20.7	Germany	11.8	8.6
United States	7.3	-4.7	Netherlands	8.7	32.7
France	7.2	5.9	France	5.9	44.5
Albania	5.5	22.5	China	5.6	15.3

Lazio: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	492.7	4.9	19.5	9
Food Industry	1,171.3	2.4	10.0	10
Beverages	252.5	2.1	-17.6	10
Food and Beverage Industry	1,423.8	2.3	3.9	10
TOTAL AGRI-FOOD TRADE	1,930.6	2.7	8.1	10
TOTAL TRADE	35,993.8	5.6	9.6	6
IMPORTS				
Primary Sector	1,092.9	4.3	22.1	7
Food Industry	2,033.9	4.7	-1.8	6
Beverages	96.2	3.3	-8.4	5
Food and Beverage Industry	2,130.2	4.6	-2.2	6
TOTAL AGRI-FOOD TRADE	3,240.5	4.5	5.2	6
TOTAL TRADE	45,471.5	7.7	-0.5	6

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Hazelnuts	5.7	65.2	Processed Fish	6.7	12.6
Extra Virgin Olive Oil	4.9	-14.8	Pectic Substances and Oils	na	na
Malt Beer	na	na	Palm Oil for Non-Food Use	na	na
Other Fresh Vegetables	4.0	2.3	Bananas	4.8	18.3
Ice Cream	na	na	Hazelnuts	4.0	118.9

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
United States	19.1	0.1	Spain	12.3	3.3
Germany	15.6	6.8	Netherlands	10.5	8.6
France	9.5	23.0	Germany	7.5	8.6
United Kingdom	8.0	-14.5	France	6.1	8.2
Spain	3.9	6.9	Indonesia	4.9	-52.5

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na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Abruzzo: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	92.5	0.9	0.9	15
Food Industry	691.0	1.4	6.3	13
Beverages	272.6	2.3	-7.3	9
Food and Beverage Industry	963.6	1.6	2.1	12
TOTAL AGRI-FOOD TRADE	1,065.8	1.5	2.8	14
TOTAL TRADE	9,956.2	1.5	6.9	12
IMPORTS				
Primary Sector	275.0	1.1	11.7	14
Food Industry	653.7	1.5	23.3	13
Beverages	7.2	0.2	-15.1	16
Food and Beverage Industry	660.9	1.4	22.7	13
TOTAL AGRI-FOOD TRADE	948.8	1.3	20.6	14
TOTAL TRADE	5,922.6	1.0	6.5	15

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Non-Egg, Unfilled Pasta	na	na	Animal Oils and Fats, for Industrial Use	na	na
Packaged PDO Red and Rosé Wines	8.6	-20.8	Durum Wheat	na	na
Biscuits and Pastry Products	7.4	6.4	Pectic Substances and Oils	na	na
Forage Seeds	4.4	7.8	Processed Fish	6.8	13.4
Frozen Vegetables and Pulses	na	na	Sheep and Goat Meat: Carcasses and Half-Carcasses	5.4	22.1

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
United States	17.3	1.0	Spain	11.7	17.4
Germany	16.6	5.2	Indonesia	10.7	17.6
France	7.9	8.2	France	9.2	9.7
Netherlands	7.2	4.9	Germany	8.9	3.1
United Kingdom	5.4	-3.7	United States	8.1	-1.6

Molise: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	6.3	0.1	26.9	19
Food Industry	293.3	0.6	7.6	17
Beverages	6.4	0.05	-39.6	19
Food and Beverage Industry	299.7	0.5	5.8	17
TOTAL AGRI-FOOD TRADE	309.3	0.4	7.2	17
TOTAL TRADE	1,237.0	0.2	-3.9	18
IMPORTS				
Primary Sector	12.7	0.05	34.0	19
Food Industry	57.8	0.1	47.0	19
Beverages	0.5	0.0	-5.3	20
Food and Beverage Industry	58.3	0.1	46.3	19
TOTAL AGRI-FOOD TRADE	74.5	0.1	49.3	19
TOTAL TRADE	833.2	0.1	5.2	18

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Non-Egg, Unfilled Pasta	na	na	Semi-Hard Cheeses	na	na
Common Wheat Flour Products	na	na	Curd and Other Fresh Cheeses	15.5	16.0
Curd and Other Fresh Cheeses	5.6	5.0	Bulk Liquid Milk	na	na
Couscous	na	na	Poultry Chicks	na	na
Whey	na	na	Cattle for Breeding	na	na

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	% Share	% Change 25/24
United States	17.7	2.7	Germany	42.3	45.3
Germany	12.9	16.1	Lithuania	23.1	32.1
France	9.9	7.5	France	6.9	254.4
Japan	6.0	-10.2	Poland	5.7	84.0
Australia	5.4	0.0	Netherlands	3.5	141.8

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na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Campania: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	711.4	7.0	1.7	6
Food Industry	4,950.8	10.0	-0.9	5
Beverages	74.1	0.6	10.9	13
Food and Beverage Industry	5,024.9	8.2	-0.8	5
TOTAL AGRI-FOOD TRADE	5,758.8	8.0	-0.2	5
TOTAL TRADE	22,732.7	3.5	3.6	7
IMPORTS				
Primary Sector	1,977.7	7.8	10.5	5
Food Industry	2,485.5	5.7	5.9	5
Beverages	27.5	0.9	-12.4	11
Food and Beverage Industry	2,513.0	5.4	5.7	5
TOTAL AGRI-FOOD TRADE	4,515.4	6.2	8.1	5
TOTAL TRADE	26,128.8	4.4	3.3	7

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Preserved and Peeled Tomatoes	22.6	-11.5	Green Coffee	10.9	31.2
Non-Egg, Unfilled Pasta	12.5	6.5	Oilseed Cakes and Animal Feed	na	na
Other Preserved or Prepared Pulses and Vegetables	8.3	2.6	Processed Fish	4.9	16.7
			Semi-Hard Cheeses	4.5	6.2
Meat Extracts, Soups, and Sauces	na	na	Preserved and Peeled Tomatoes	3.8	-31.3
Curd and Other Fresh Cheeses	5.3	12.1			

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
United States	15.9	0.7	Germany	12.2	7.0
Germany	11.9	4.3	Spain	11.3	17.3
United Kingdom	11.7	-1.4	Netherlands	8.7	71.1
France	7.5	4.8	Argentina	6.3	8.1
Netherlands	4.4	-1.8	United States	5.5	-1.5

Apulia: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	1,117.0	11.1	5.0	4
Food Industry	1,535.1	3.1	1.0	8
Beverages	308.6	2.6	3.2	7
Food and Beverage Industry	1,843.7	3.0	1.4	8
TOTAL AGRI-FOOD TRADE	2,986.8	4.1	3.5	8
TOTAL TRADE	9,894.4	1.5	2.6	13
IMPORTS				
Primary Sector	1,385.9	5.5	14.0	6
Food Industry	1,624.2	3.7	-1.6	8
Beverages	15.9	0.5	-14.1	13
Food and Beverage Industry	1,640.1	3.5	-1.7	8
TOTAL AGRI-FOOD TRADE	3,049.2	4.2	5.4	7
TOTAL TRADE	10,771.6	1.8	1.9	11

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Table Grapes	20.1	1.8	Durum Wheat	15.8	-2.4
Non-Egg, Unfilled Pasta	8.3	-12.2	Extra Virgin Olive Oil	11.2	-7.6
Curd and Other Fresh Cheeses	8.0	18.8	Seed Oils and Vegetable Fats	na	na
Extra Virgin Olive Oil	6.9	-14.7	Almonds	na	na
Preserved and Peeled Tomatoes	4.8	29.1	Common Wheat and Spelt	5.0	27.4

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	23.7	-5.3	Spain	14.2	-10.5
France	9.0	12.5	Greece	10.5	-14.0
United Kingdom	6.7	37.1	Ukraine	9.6	0.0
Spain	5.8	2.1	Canada	7.8	43.1
Poland	4.8	14.0	France	6.5	7.1

Note: Any discrepancy between the sum of the sectors and the total agri-food value is due to "Other agri-food products (below the threshold: 1-24)", which are not allocated to a specific sector.
na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Basilicata: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	65.5	0.6	12.3	17
Food Industry	194.5	0.4	4.7	19
Beverages	2.7	0.02	5.9	20
Food and Beverage Industry	197.2	0.3	4.7	19
TOTAL AGRI-FOOD TRADE	265.2	0.4	7.4	19
TOTAL TRADE	1,313.4	0.2	-17.8	17
IMPORTS				
Primary Sector	57.4	0.2	19.0	18
Food Industry	122.8	0.3	33.5	18
Beverages	3.3	0.11	-6.0	17
Food and Beverage Industry	126.1	0.3	32.1	18
TOTAL AGRI-FOOD TRADE	186.9	0.3	29.5	18
TOTAL TRADE	832.0	0.1	-0.4	19

TOP 5 PRODUCTS					
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Biscuits and Pastry Products	na	na	Rapeseed or Canola Oil for Non-Food Use	na	na
Non-Egg, Unfilled Pasta	na	na	Cocoa-Based Products	na	na
Cauliflowers and Cabbages	6.7	40.9	Grapevine Cuttings and Fruit and Vegetable Plants	na	na
Table Grapes	5.3	-5.5			
Rusks	na	na	Durum Wheat	na	na
			Other Vegetable Oils and Fats, for Indust. Use	na	na

TOP 5 TRADING PARTNERS					
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	32.0	22.2	France	32.6	174.2
France	14.8	-8.9	Spain	14.6	19.9
United Kingdom	9.8	-6.2	Poland	9.0	32.2
Netherlands	4.3	12.5	Germany	8.8	7.6
Spain	4.3	-35.4	Belgium	6.3	-13.2

Calabria: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	75.0	0.7	6.5	16
Food Industry	515.7	1.0	9.7	15
Beverages	11.1	0.1	-10.3	18
Food and Beverage Industry	526.8	0.9	9.2	15
TOTAL AGRI-FOOD TRADE	610.5	0.8	10.2	16
TOTAL TRADE	1,031.1	0.2	10.8	19
IMPORTS				
Primary Sector	72.9	0.3	58.6	17
Food Industry	374.5	0.9	9.7	16
Beverages	2.4	0.08	20.4	19
Food and Beverage Industry	376.9	0.8	9.8	16
TOTAL AGRI-FOOD TRADE	462.2	0.6	18.2	17
TOTAL TRADE	1,254.1	0.2	6.8	17

TOP 5 PRODUCTS					
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Essential Oils	26.5	18.5	Essential Oils	na	na
Fruit Juices	24.4	4.9	Extra Virgin Olive Oil	13.6	-10.2
Meat Extracts, Soups, and Sauces	na	na	Processed Fish	10.2	9.6
Mandarins and Clementines	4.7	-6.3	Fruit Juices	9.2	-9.9
Extra Virgin Olive Oil	4.3	-10.2	Frozen Crustac. and Molluscs	4.5	0.9

TOP 5 TRADING PARTNERS					
EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	11.7	11.8	Spain	23.9	20.4
United States	9.7	-11.9	Brazil	9.7	311.8
France	9.2	22.2	Germany	8.6	-2.6
Poland	9.0	1.4	Greece	8.3	-22.5
Netherlands	8.6	44.6	France	5.7	1.9

Note: Any discrepancy between the sum of the sectors and the total agri-food value is due to "Other agri-food products (below the threshold: 1-24)", which are not allocated to a specific sector.
na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

Sicily: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	786.5	7.8	15.7	5
Food Industry	995.7	2.0	11.7	11
Beverages	191.4	1.6	-4.0	11
Food and Beverage Industry	1,187.1	1.9	8.8	11
TOTAL AGRI-FOOD TRADE	2,002.6	2.8	12.8	9
TOTAL TRADE	12,012.3	1.9	-10.8	11
IMPORTS				
Primary Sector	808.4	3.2	35.8	9
Food Industry	960.2	2.2	1.4	11
Beverages	44.4	1.5	-22.4	9
Food and Beverage Industry	1,004.6	2.2	0.1	11
TOTAL AGRI-FOOD TRADE	1,843.5	2.5	14.8	11
TOTAL TRADE	14,577.1	2.5	-25.2	8

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Table Grapes	9.7	19.7	Pistachios	17.1	66.2
Fruit Juices	7.8	-2.9	Processed Fish	8.6	-4.1
Prepared or Preserved Fruit	7.6	74.4	Green Coffee	7.0	30.4
Tomatoes	5.3	14.6	Frozen Crustaceans and Molluscs	5.0	9.6
Oranges	5.1	9.4	Pork: Fresh or Chilled Carcasses and Half-Carcasses	4.7	-8.6

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Germany	15.7	15.1	Spain	14.5	2.1
France	14.7	7.1	Germany	12.5	0.8
United States	11.6	7.3	United States	8.1	69.8
Malta	6.0	5.4	France	7.5	18.3
Netherlands	4.5	6.6	Netherlands	6.8	17.3

Sardinia: main data on foreign trade (values in million euros)

	Value 2025	% Share of Italy	% Change 25/24	Ranking Position
EXPORTS				
Primary Sector	15.2	0.2	1.6	18
Food Industry	225.0	0.5	-0.7	18
Beverages	25.4	0.2	-9.4	17
Food and Beverage Industry	250.4	0.4	-1.7	18
TOTAL AGRI-FOOD TRADE	273.3	0.4	1.0	18
TOTAL TRADE	5,897.5	0.9	-11.4	15
IMPORTS				
Primary Sector	221.8	0.9	8.6	15
Food Industry	316.7	0.7	42.6	17
Beverages	11.8	0.4	5.9	14
Food and Beverage Industry	328.5	0.7	40.9	17
TOTAL AGRI-FOOD TRADE	559.7	0.8	27.2	16
TOTAL TRADE	7,990.5	1.3	-16.1	14

TOP 5 PRODUCTS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
Pecorino and Fiore Sardo	43.8	-4.5	Other Vegetable Oils and Fats, for Indust. Use	na	na
Non-Egg, Unfilled Pasta	na	na	Maize	11.3	71.4
Semi-Hard Cheeses	5.5	4.6	Processed Fish	6.6	2.3
Sheep and Goat Meat: Carcasses and Half-Carcasses	na	na	Oilseed Cakes and Animal Feed	6.6	11.0
Wood, Cork, and Bamboo	3.7	11.7	Common Wheat and Spelt	4.1	-9.2

TOP 5 TRADING PARTNERS

EXPORTS	Share %	% Change 25/24	IMPORTS	Share %	% Change 25/24
United States	47.6	-5.8	Spain	17.7	-4.2
Germany	8.9	48.5	Netherlands	11.0	30.8
Spain	8.2	3.9	Germany	9.5	108.9
France	4.4	-1.1	France	9.3	11.6
Switzerland	3.9	-8.3	Ukraine	7.8	4.4

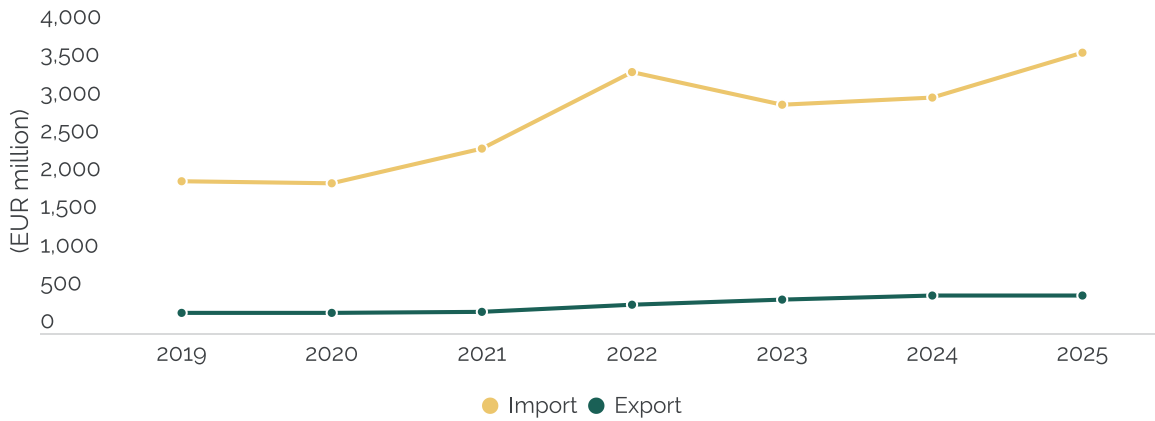
Note: Any discrepancy between the sum of the sectors and the total agri-food value is due to "Other agri-food products (below the threshold: 1-24)", which are not allocated to a specific sector.
na: Data not available due to statistical confidentiality requirements.
Source: CREA elaborations based on ISTAT data.

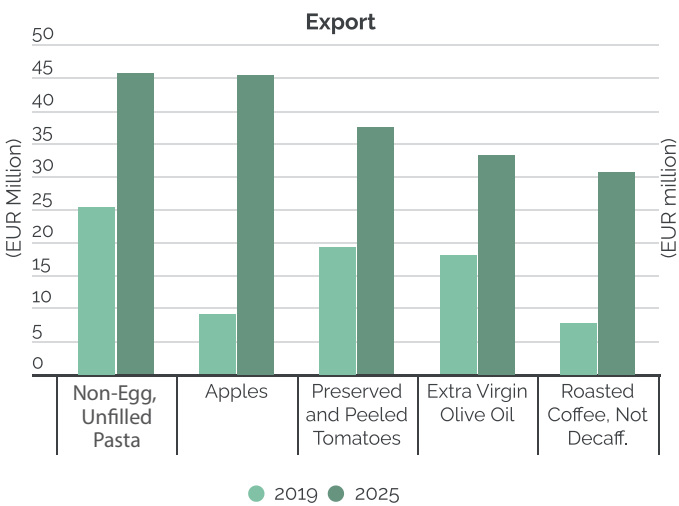
THE EU-MERCOSUR AGREEMENT AND ITALY'S AGRI-FOOD TRADE

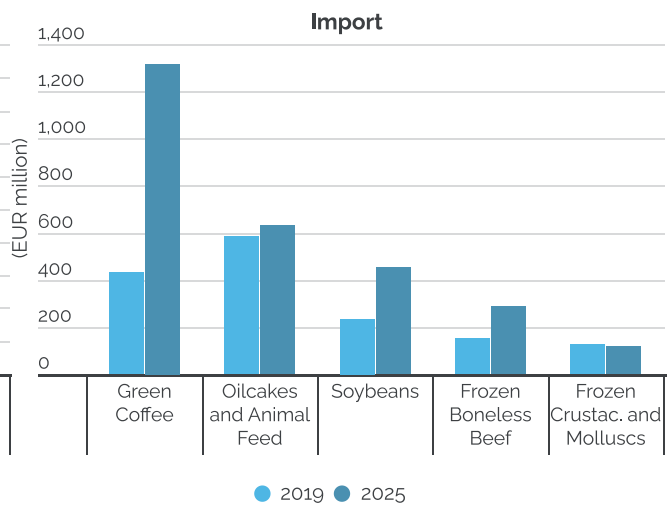


CHAPTER 6

ITALY'S AGRI-FOOD TRADE WITH MERCOSUR







6.1 The EU-Mercosur agreement

The EU-Mercosur agreement, formally signed on 17 January 2026 after more than twenty-five years of negotiations, represents one of the most significant trade-integration initiatives worldwide. The agreement involves two economic areas that together comprise approximately 700 million consumers and generate almost 20% of global GDP. Its objective is to create a broad free-trade area and strengthen the international competitiveness of the European Union.

This chapter describes the main aspects of the agreement and agri-food trade between Italy and the Mercosur countries. For a more detailed analysis, reference should be made to the CREA-PB report entitled 'The EU-Mercosur Agreement and Italy's Agri-food Trade', available on the CAP Network website.

Key aspects of the EU-Mercosur agreement

The agreement primarily aims to promote greater trade integration between the two areas through the progressive elimination of tariffs on more than 90% of traded products, the reduction of trade barriers and the expansion of opportunities for businesses and consumers. Liberalisation covers both industrial and agricultural goods, with differentiated timetables for the most sensitive products, which may be subject to quantitative limits, tariff-rate quotas or longer transition periods.

From an institutional perspective, the agreement takes the form of an Association Agreement comprising political, cooperation and trade components. Its structure operates at two levels: the comprehensive framework agreement (EMPA) and the Interim Trade Agreement (ITA). The latter, which concerns the trade pillar, entered into provisional application on 1 May 2026, after the European Parliament had decided on 21 January 2026 to refer the agreement to the Court of Justice of the European Union.

The agreement pursues three principal objectives:

1. progressively eliminate customs duties on more than 90% of products traded between the EU and Mercosur, according to a timetable of gradual reductions over the medium term;
2. create a broad and stable free-trade market, strengthening economic cooperation and reducing trade barriers;
3. expand opportunities for businesses and consumers through reciprocal market opening, including industrial goods, agricultural products and services.

As noted above, tariffs will eventually be eliminated on approximately 90% of goods traded between the two areas. The remaining 10% consists of products considered 'sensitive', for which tariff-rate quotas (TRQs) are provided, namely defined quantitative import quotas for EU imports from Mercosur subject to reduced or zero duties. In the agri-food sector, such quotas concern products including beef, poultry and sugar, with the aim of limiting any adverse impacts on European supply chains.

To mitigate the effects of regulatory differences between the parties, the agreement also provides for:

- protection of EU Geographical Indications against imitation in Mercosur countries;
- support funds and market interventions to assist European agricultural sectors in the event of imbalances caused by increased imports.

With regard to intellectual property, the EU-Mercosur agreement protects 344 European Geographical Indications (GIs), including 58 high-quality Italian products. These products will receive legal protection in Mercosur countries, with the aim of reducing imitation and enhancing the value of origin labels. The agreement also includes safeguard clauses allowing the EU to temporarily reintroduce tariffs or restrict imports if an increase in flows seriously threatens European producers.

The main changes introduced by the agreement to the tariff-rate quotas applying to the agri-food products most frequently imported into Italy from Mercosur are described below.

Table 6.1 Main pre-agreement quotas/tariffs and progressive tariff reduction/elimination for selected agri-food products imported from Mercosur

Product category	Pre-agreement tariffs/quotas	Tariffs/quotas under the agreement	Notes
Beef	12.8% duty plus a fixed duty; 20% duty on the Hilton quota for high-quality beef	Quota of 99,000 tonnes/year with a reduced in-quota duty (7.5%); elimination of the duty on the Hilton quota	Quota equivalent to approximately 1.5% of EU consumption; ordinary MFN (Most-Favoured-Nation) tariffs apply outside the quota.
Poultry	High tariffs (specific conditions vary by product)	Duty-free quota of 180,000 tonnes	Limited, incremental preferential quotas; MFN tariffs apply outside the quota.
Sugar	Quota of 334,054 tonnes for Brazil with an in-quota duty of EUR 98/tonne plus a variable duty	Duty-free quota of 190,000 tonnes for raw cane sugar intended for refining	Gradual tariff reduction; ordinary MFN tariffs apply outside the quota.

Source: European Commission, 2026

Green coffee already entered the EU market duty-free and is therefore unaffected by the agreement. The main change concerns processed coffee, including roasted, ground and soluble coffee, for which tariffs previously ranging from 7% to 9% will be progressively eliminated over four years, without the introduction of quantitative quotas.

For soybeans and their derivatives, the agreement introduces no new barriers but addresses export measures. In particular, Argentina undertakes to limit and progressively reduce export taxes on soybeans, to a maximum ceiling of 14% once fully implemented.

Before the agreement, beef exports from Mercosur to the EU were subject to a 12.8% tariff plus a fixed duty. The agreement will allow 99,000 tonnes of beef from Mercosur to enter the European Union market at a preferential tariff of 7.5%. The new quota will consist of 55% fresh or chilled beef and 45% frozen beef. Any additional volumes imported from the area outside the quota will continue to be subject to the higher tariff. The 20% duty on the Hilton quota for high-quality beef will also be eliminated.

The EU-Mercosur agreement allows the European Union to import a duty-free quota of 180,000 tonnes of poultry, to be phased in over five years.

For sugar, the tariff-rate quota allocated under the EU's World Trade Organization (WTO) schedule applies a duty of EUR 98 per tonne plus a variable duty to in-quota exports to the European Union (covering 334,000 tonnes for Brazil). Under the EU-Mercosur agreement, 180,000 tonnes of raw cane sugar for refining will benefit from duty-free access under an existing tariff-rate quota. In addition, a new duty-free quota of 10,000 tonnes will be established exclusively for Paraguay. Imports outside the established quotas will remain subject to the currently applicable Most-Favoured-Nation (MFN) tariff rate.

Finally, for rice, the agreement will allow 60,000 tonnes of Mercosur product to enter the EU duty-free. This volume will be phased in over five years.

Turning to the main Italian products exported to Mercosur, tariff reductions for olive oil will be applied asymmetrically. While European Union imports from Mercosur countries already benefit from broadly liberalised access, the approximately 10% tariff on EU exports to Mercosur will be progressively eliminated over 15 years. For olive-pomace oils, the tariff elimination period will be four years.

Apple exports to Mercosur countries may benefit from the reduction of tariff and non-tariff barriers provided for by the agreement, as well as simplified administrative and customs procedures and stronger protection

for the 'Mela Alto Adige IGP' Geographical Indication. These measures could facilitate greater access for Italian products to South American markets, consolidating the growth trend observed in recent years.

For preserved tomatoes, which are currently subject to a 14.4% ad valorem tariff upon entry into Mercosur, the EU-Mercosur agreement provides for full tariff liberalisation, with the duty progressively eliminated over seven years and no quantitative quotas introduced.

Italian pasta, currently subject to an average tariff of 16% in Mercosur countries, will likewise benefit from the progressive elimination of duties over seven years, without quantitative limits.

It is important to emphasise that, even where tariff exemptions apply, access to Mercosur markets remains conditional on compliance with local labelling and food-safety rules, with which Italian firms must comply in order to market their products. Nevertheless, the agreement may provide benefits through the simplification and harmonisation of procedures and labelling requirements.

In summary, the EU-Mercosur agreement represents an important opportunity to strengthen international trade and economic cooperation, although its effectiveness will depend on the ability to balance trade openness, protection of domestic supply chains and compliance with high environmental and social standards.

6.2 Italy's agri-food trade with Mercosur

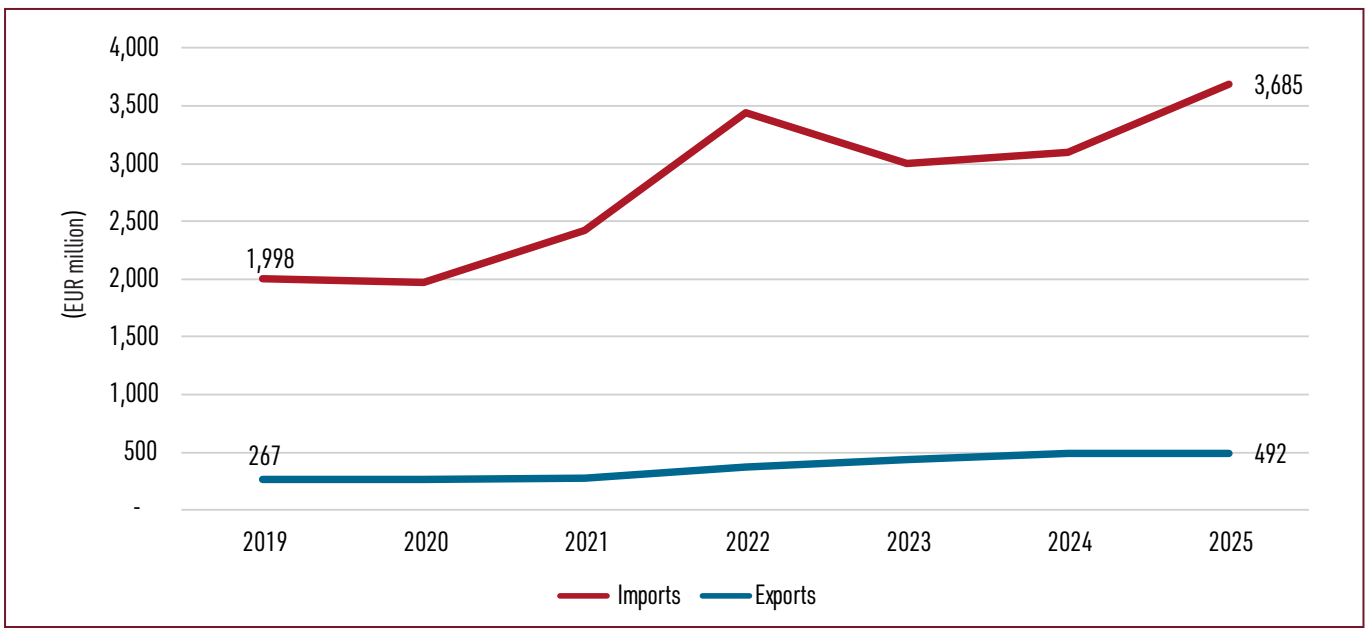
Italy is a net importer of agri-food products from Mercosur (Argentina, Brazil, Paraguay and Uruguay). In 2025, Italian agri-food imports from the area amounted to almost EUR 3.7 billion, compared with slightly less than EUR 500 million in exports (Figure 6.1). Analysis of trade over the past six years shows an overall increase in the value of both imports, from EUR 2 billion in 2019 to EUR 3.68 billion in 2025, and exports, from EUR 267 million to EUR 492 million. These trends also reflect rising international prices for certain products, including green and roasted coffee.

Brazil is Italy's main market within Mercosur, receiving 82% of Italian agri-food exports to the area and supplying 66% of imports (Table 6.2). In recent years, this share has remained broadly stable for exports but has increased for imports, reducing Argentina's share from 44% in 2019 to 30% in 2025.

Italy was the EU's second-largest exporter of agri-food products to Mercosur by value (Figure 6.2). Portugal ranked first, exporting almost EUR 600 million in agri-food products to Mercosur in 2025. Spain and the Netherlands were also major exporters, with values slightly below Italy's. Portugal also recorded the highest share of Mercosur in national agri-food exports among EU countries, at 5.6%, mainly owing to olive oil sales (Figure 6.3).

Portugal was nevertheless an exception, as Mercosur accounted for less than 1% of national agri-food exports in all other EU countries, except Austria at 1.2%. For Italy, the share was approximately 0.7%, slightly above

Figure 6.1 Italy's agri-food trade with Mercosur, 2019-2025 (EUR million)



Source: CREA elaborations based on ISTAT data.

Table 6.2 Italy's agri-food trade with Mercosur, by country, 2019-2025 (EUR million)

	Country	2019	2020	2021	2022	2023	2024	2025
Exports	Brazil	221.0	224.0	224.8	308.2	376.8	414.6	404.5
	Argentina	28.0	26.9	32.9	38.0	33.3	42.4	50.9
	Uruguay	13.4	11.9	14.7	15.9	19.9	26.3	27.0
	Paraguay	4.3	3.9	5.1	8.5	9.0	11.1	9.5
Total Exports		**266.8**	**266.8**	**277.5**	**370.6**	**439.0**	**494.5**	**491.8**
Imports	Brazil	977.5	1,066.3	1,487.7	2,253.0	1,938.1	2,048.8	2,441.3
	Argentina	882.0	795.6	847.4	1,076.2	910.6	956.2	1,110.0
	Uruguay	49.6	48.9	67.5	48.0	115.8	63.7	98.7
	Paraguay	89.3	58.1	23.2	62.8	37.0	29.4	34.7
Total Imports		**1,998.3**	**1,968.8**	**2,425.8**	**3,440.0**	**3,001.6**	**3,098.1**	**3,684.7**

Source: CREA elaborations based on ISTAT data.

the European average of around 0.4%, but still limited. As shown in greater detail below, these exports mainly consisted of apples and selected processed Made in Italy products.

Overall, EU agri-food exports to Mercosur amounted to approximately EUR 3.2 billion in 2025, substantially less than imports, which reached EUR 25 billion.

With regard to imports, Italy was the EU's fourth-largest purchaser of agri-food products from Mercosur by value, after the Netherlands, Spain and Germany (Figure 6.4). Together, these four countries accounted for more than two thirds of EU agri-food imports from Mercosur (Figure 6.5). The Netherlands was clearly the leading purchaser, buying approximately EUR 5.6 billion in agri-food products in 2025. Spain and Germany followed at just under EUR 4 billion, and Italy at approximately EUR 3.7 billion.

Mercosur accounted for around 5% of Italy's agri-food sourcing, above the EU average of 3.4%, mainly owing to products such as green coffee, animal feed, soybeans and beef. Slovenia recorded the highest share among EU countries, at 7.6%, primarily attributable to purchases of oilcake and animal feed. The share was approximately 6-7% for the Netherlands and Spain, while Mercosur's share of agri-food imports was lower in France and Germany, at around 2% and 3%, respectively, below the European average.

Although Mercosur accounts for a limited share of Italy's total agri-food exports, the bloc remains an attractive and expanding market, especially for certain products. In 2025, pasta was Italy's leading export item to Mercosur by value, followed by preserved tomatoes and apples, all products that have recorded growth in South American markets in recent years (Tables 6.3 and 6.4).

For apples, this trend also produced a sharp increase in Mercosur's share of Italian exports of the product, from 1.2% in 2019 to almost 4% in 2025 (Figure 6.6).

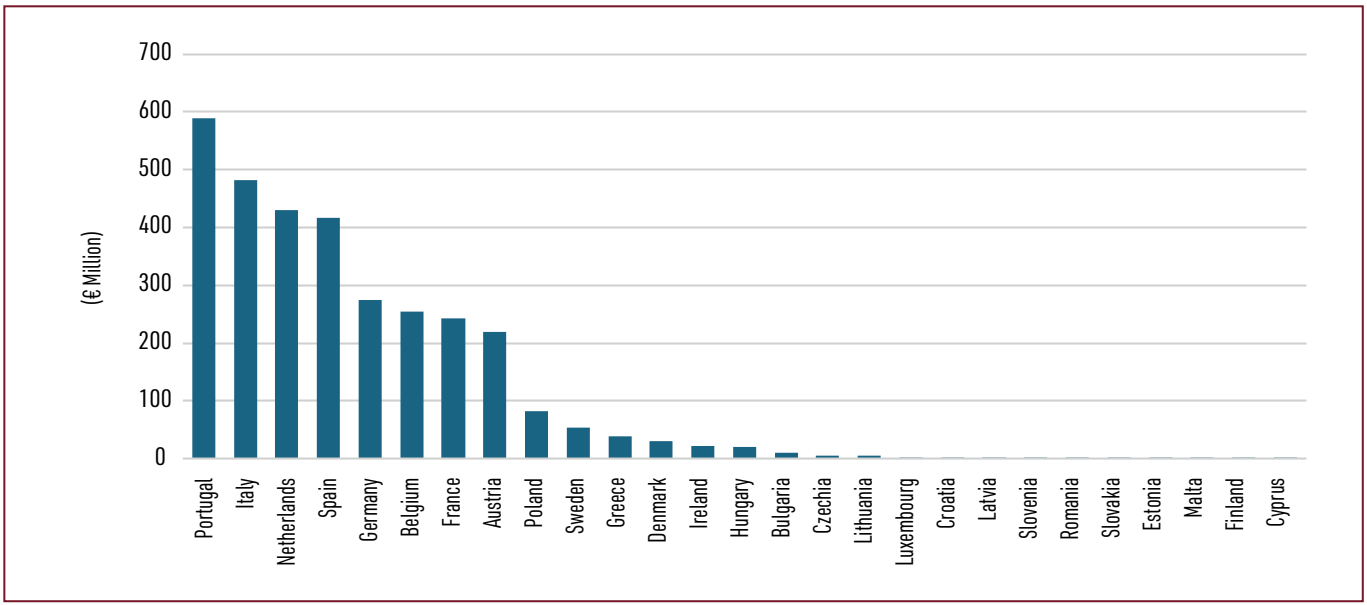
For the other principal export items, including several processed Made in Italy products, Mercosur's share as a destination market remained limited, at 1-2% in 2025, stable or slightly higher than in recent years. Despite this limited share, many of the leading exported products recorded increases in both value and quantity. Particularly noteworthy was the performance of biscuit and pastry sales to Mercosur, with volumes more than doubling between 2019 and 2025.

Among beverages, Italy's leading exports to Mercosur were PDO and PGI red wines, mainly produced in Tuscany and Piedmont, although their share of total Italian exports worldwide remained limited at 1%.

Kiwifruit was the only major product to record a marked decline in sales in both value and quantity. In 2019, it was the leading agri-food export item to Mercosur, valued at EUR 29 million, falling to EUR 18 million in 2025.

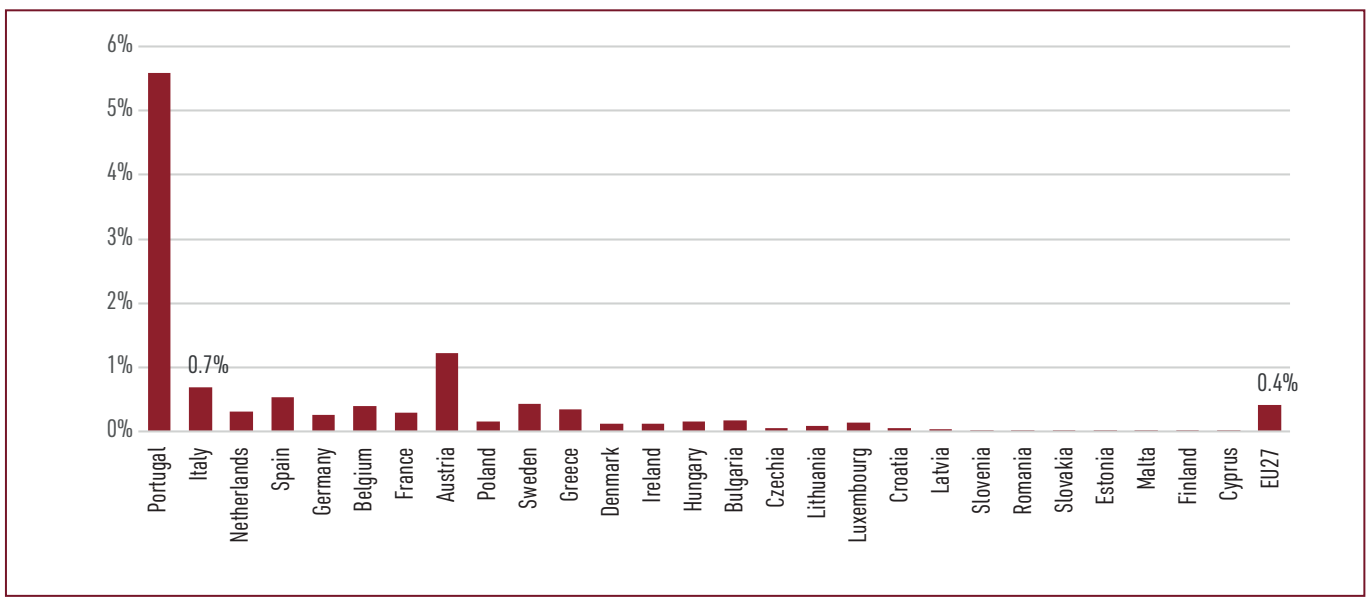
As already noted, Mercosur is more important to Italy on the agri-food import side, accounting for 5% in 2025.

Figure 6.2 Agri-food exports from EU countries to Mercosur, 2025 (EUR million)



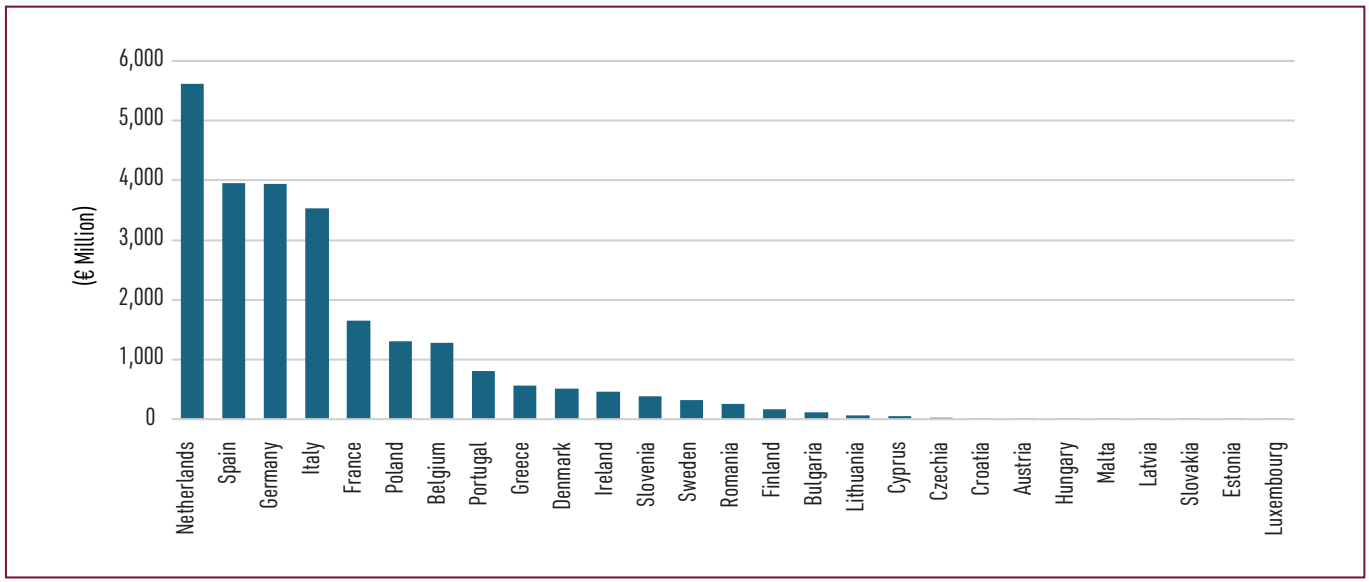
Source: CREA elaborations based on COMEXT-EUROSTAT data.

Figure 6.3 Percentage share of EU countries' agri-food exports destined for Mercosur, 2025



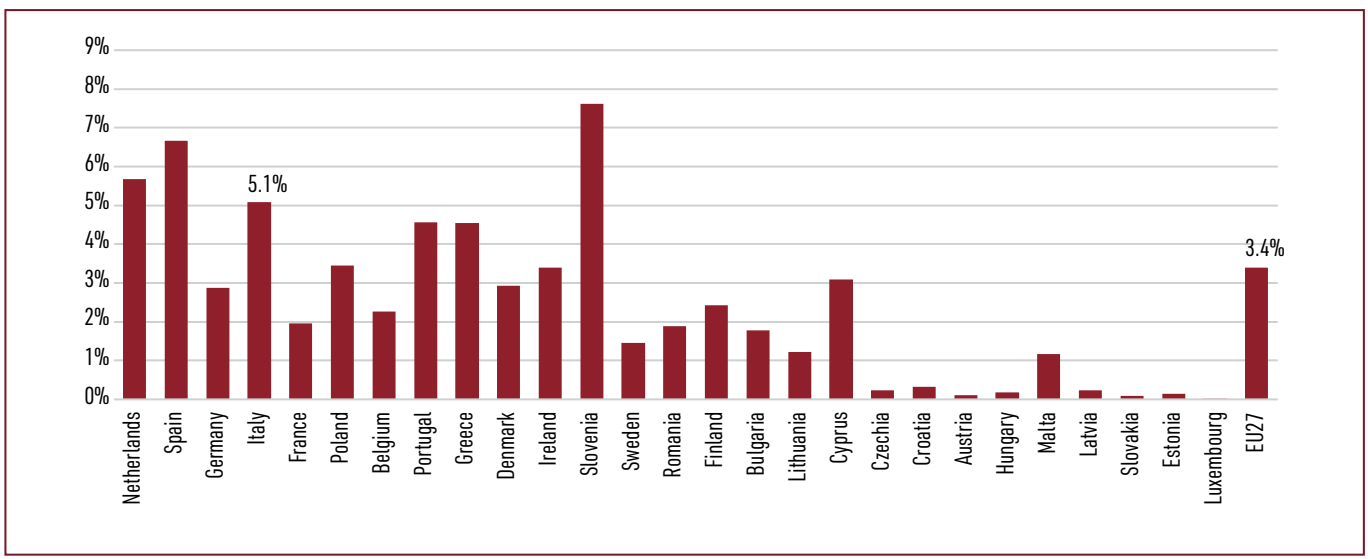
Source: CREA elaborations based on COMEXT-EUROSTAT data.

Figure 6.4 Agri-food imports of EU countries from Mercosur, 2025 (EUR million)



Source: CREA elaborations based on COMEXT-EUROSTAT data.

Figure 6.5 Percentage share of EU countries' agri-food imports from Mercosur, 2025



Source: CREA elaborations based on COMEXT-EUROSTAT data.

Table 6.3 Italy's agri-food exports to Mercosur, main products, 2019-2025 (EUR million)

Products	2019	2020	2021	2022	2023	2024	2025
Non-Egg, Unfilled Pasta	25.4	25.6	25.9	31.6	38.0	45.1	45.6
Apples	9.1	14.4	4.8	32.1	50.6	60.8	45.4
Preserved and Peeled Tomatoes	19.3	19.0	20.9	25.1	34.7	35.8	37.4
Extra Virgin Olive Oil	18.0	16.5	20.6	32.9	33.5	42.6	33.3
Roasted Coffee, Not Decaffeinated	7.8	6.0	13.0	21.1	23.4	21.8	30.7
Cocoa-Based Products	18.0	12.8	11.9	16.4	21.4	26.4	28.8
Biscuits and Pastry Products	7.9	12.8	14.7	22.2	25.9	22.5	25.6
Kiwifruit	29.3	24.5	16.7	21.2	22.0	13.9	17.9
Prepared or Preserved Fruit	2.6	2.6	2.9	4.1	7.3	12.7	17.8
Packaged Red and Rosé Wines (PDO)	12.2	10.4	11.6	12.6	12.3	15.1	17.7
Packaged Red and Rosé Wines (PGI)	7.8	9.4	8.4	8.8	9.6	10.2	12.1
Other Prepared Pork	5.7	5.8	9.8	8.9	9.0	10.4	11.3
Non-Food Animal By-Products	6.0	6.6	5.3	6.8	3.8	8.3	8.9
Rice	5.6	7.2	6.9	9.4	12.0	10.2	8.6
Oilcakes and Animal Feed	2.1	3.6	4.4	4.2	3.7	5.9	6.9
Total Agri-Food Products	**266.8**	**266.8**	**277.5**	**370.6**	**439.0**	**494.5**	**491.8**

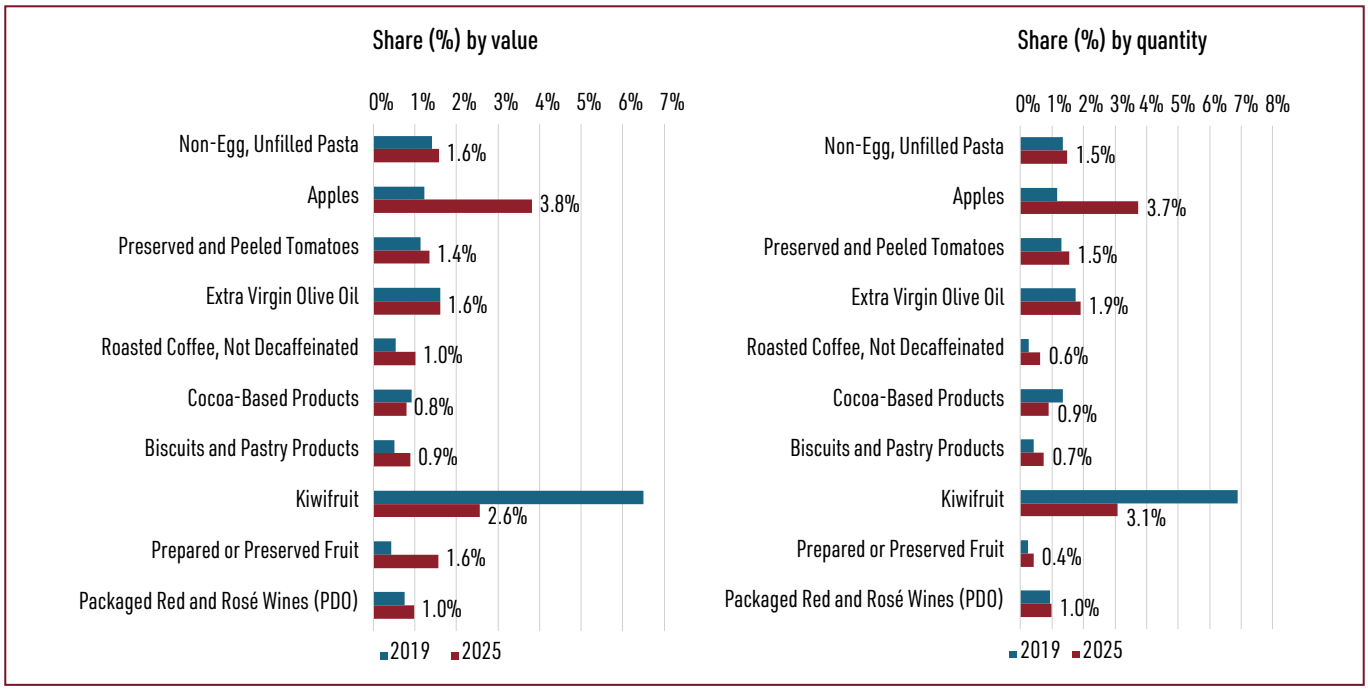
Source: CREA elaborations based on ISTAT data.

Table 6.4 Italy's agri-food exports to Mercosur, main products, 2019-2025 (quantities in thousand tonnes)

Products	2019	2020	2021	2022	2023	2024	2025
Non-Egg, Unfilled Pasta	25.7	24.2	24.0	23.2	25.8	30.7	32.0
Apples	10.5	15.9	5.0	31.7	44.7	50.2	39.3
Preserved and Peeled Tomatoes	28.6	25.9	25.5	25.7	28.9	30.5	34.5
Extra Virgin Olive Oil	4.4	4.4	4.8	6.6	4.5	4.3	5.5
Roasted Coffee, Not Decaffeinated	0.7	0.4	1.0	1.3	1.4	1.4	1.7
Cocoa-Based Products	4.9	3.1	2.2	2.6	2.8	3.2	3.8
Biscuits and Pastry Products	1.6	2.7	2.8	3.1	3.5	3.3	3.9
Kiwifruit	21.5	15.6	9.8	13.6	12.7	6.5	7.8
Prepared or Preserved Fruit	0.7	0.6	0.7	0.9	1.0	1.2	1.3
Packaged Red and Rosé Wines (PDO)	2.7	2.2	2.3	2.3	2.0	2.3	2.4
Packaged Red and Rosé Wines (PGI)	2.3	3.1	2.9	2.6	2.6	2.7	2.7
Other Prepared Pork	0.7	0.6	1.0	1.0	1.0	1.0	1.1
Non-Food Animal By-Products	0.5	0.6	0.5	0.6	0.4	0.7	0.7
Rice	4.7	6.4	5.8	6.3	6.1	6.4	4.5
Oilcakes and Animal Feed	0.9	1.4	1.7	1.4	1.3	1.9	3.3
Total Agri-Food Products	**146.1**	**141.9**	**126.6**	**158.9**	**176.7**	**188.4**	**186.4**

Source: CREA elaborations based on ISTAT data.

Figure 6.6 Mercosur's share of Italy's agri-food exports, by main product, 2019 and 2025



Source: CREA elaborations based on ISTAT data.

The leading agri-food product imported from Mercosur is green coffee, which is essential to Italy's roasting industry and has experienced a sharp rise in prices in recent years (Tables 6.5 and 6.6). In 2025, while the value of green coffee imported from Mercosur increased by more than 40% compared with 2024, purchased volumes declined by 13.7%, reflecting the sharp increase in average unit value. The entire flow of green coffee from Mercosur, amounting to EUR 1.3 billion in 2025, originated in Brazil, which has consistently been Italy's leading supplier worldwide, with a share of 36% (Figure 6.7). Other significant imports from Mercosur are animal-feed products, mainly oilcake and other residues from soybean-oil extraction, for which Argentina is Italy's leading supplier, with a share exceeding 70%.

Among the principal import products, soybeans recorded the strongest growth in flows between 2019 and 2025, despite the contraction in the latest year. Imported volumes increased from 710,000 tonnes in 2019 to 1.2 million tonnes in 2025, all originating in Brazil. Brazil thus became Italy's leading soybean supplier, overtaking the United States, with its share rising from 30% in 2019 to almost 50% in 2025.

Flows of frozen and chilled boneless beef were also significant. Almost 70% of Italy's imports of frozen boneless beef originated in Mercosur. This amounted to more than 41,000 tonnes in 2025, mainly from Brazil, the leading supplier, and to a lesser extent from Uruguay, Paraguay and Argentina, Italy's second-, sixth- and seventh-largest suppliers, respectively. For fresh or chilled boneless beef, Mercosur's share was lower, at 14% in 2025.

Between 2019 and 2025, the largest percentage increase among the items analysed concerned sugar purchases from Brazil. Following the pandemic, Brazil moved up the rankings to become Italy's fourth-largest sugar supplier in 2025, although its share of Italy's total

Table 6.5 Italy's agri-food imports from Mercosur, main products, 2019-2025 (EUR million)

Product	2019	2020	2021	2022	2023	2024	2025
Green Coffee	432.6	346.4	401.3	808.8	726.1	927.9	1,317.1
Oilcakes and Animal Feed	584.9	522.1	573.9	747.8	684.8	664.7	632.2
Soybeans	234.7	373.0	638.0	702.2	638.5	602.9	453.2
Frozen Boneless Beef	152.0	167.6	180.9	196.1	175.3	200.3	288.1
Frozen Crustaceans and Molluscs	126.9	115.0	189.8	109.7	123.0	157.3	117.1
Fresh or Chilled Boneless Beef	87.2	54.2	59.7	77.3	73.5	80.7	113.3
Maize	57.1	55.7	31.8	289.2	82.2	34.4	97.9
Pectic Substances and Oils	5.0	6.8	16.3	58.0	32.1	42.1	89.3
Seed Oils and Vegetable Fats	15.0	25.5	33.3	48.6	37.5	33.7	69.5
Sugar and Other Sugar Products	2.0	8.7	2.6	21.4	45.7	39.5	63.0
Other Oils and Fats of Vegetable Origin, Industrial Use	1.2	0.5	2.4	21.9	49.0	0.03	52.5
Essential Oils	1.7	1.0	1.3	4.9	5.3	9.8	47.2
Dried Common Beans	31.0	35.2	37.1	49.3	37.8	32.5	39.7
Groundnuts	23.1	23.9	23.7	33.2	31.4	35.2	34.7
Raw Tobacco	1.2	1.2	5.5	18.2	37.7	41.2	30.5
Total Agri-Food Products	**1,998.3**	**1,968.8**	**2,425.8**	**3,440.0**	**3,001.6**	**3,098.1**	**3,684.7**

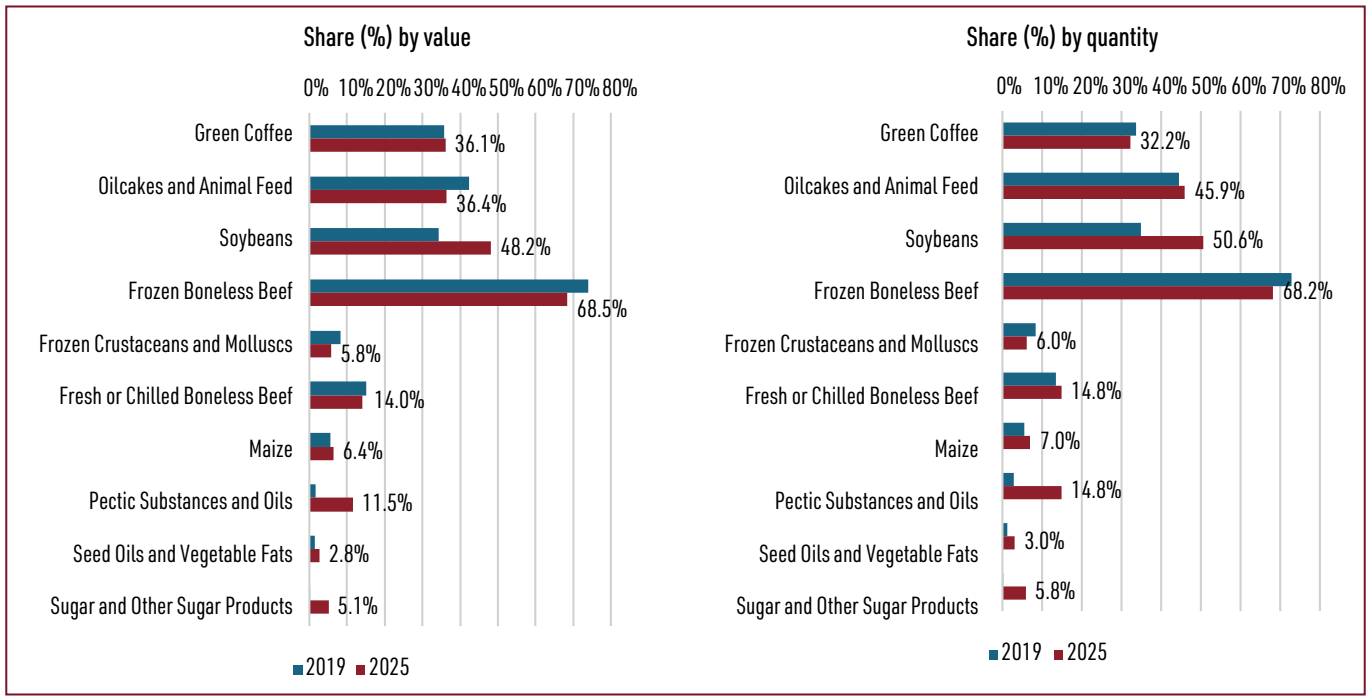
Source: CREA elaborations based on ISTAT data.

Table 6.6 Italy's agri-food imports from Mercosur, main products, 2019-2025 (quantities in thousand tonnes)

Product	2019	2020	2021	2022	2023	2024	2025
Green Coffee	206.3	166.1	184.9	199.9	198.1	238.2	205.5
Oilcakes and Animal Feed	1,859.5	1,711.9	1,493.9	1,462.7	1,344.9	1,678.2	1,928.5
Soybeans	710.2	1,125.3	1,403.5	1,165.6	1,201.7	1,416.6	1,206.3
Frozen Boneless Beef	30.1	29.0	31.6	27.1	28.6	32.1	41.5
Frozen Crustaceans and Molluscs	21.0	21.0	27.3	15.6	19.4	26.2	16.4
Fresh or Chilled Boneless Beef	10.5	6.7	6.7	6.6	7.0	7.2	9.4
Maize	346.2	340.8	131.8	899.6	280.8	165.7	476.9
Pectic Substances and Oils	11.6	14.3	21.0	47.7	32.9	50.4	95.5
Seed Oils and Vegetable Fats	14.4	16.7	20.6	26.6	20.6	20.8	56.2
Sugar and Other Sugar Products	2.3	24.6	3.4	42.5	72.1	70.4	134.6
Other Oils and Fats of Vegetable Origin, Industrial Use	2.0	0.5	3.4	15.3	39.9	0.0	50.1
Essential Oils	0.1	0.1	0.2	0.4	0.4	0.6	3.5
Dried Common Beans	32.0	36.7	35.8	41.0	31.4	23.9	34.2
Groundnuts	17.4	18.6	19.0	22.8	19.8	19.8	23.4
Raw Tobacco	0.3	0.3	2.3	4.7	7.6	6.9	5.1
Total Agri-Food Products	**3,488.4**	**3,694.4**	**3,558.5**	**4,181.8**	**3,494.2**	**3,870.6**	**4,423.1**

Source: CREA elaborations based on ISTAT data.

Figure 6.7 Mercosur's share of Italy's agri-food imports, by main product, 2019 and 2025



Source: CREA elaborations based on ISTAT data.

imports of this product remained limited at 5%. It should be clarified, however, that these imports from Mercosur did not consist of raw sugar for refining, which is the item covered by the tariff exemption provided for in the agreement.



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