



FONDAZIONE  
EDISON

 Confagricoltura

# ITALY'S STRENGTHS IN AGRICULTURE:

A LEADING EUROPEAN  
AND GLOBAL  
PRODUCER OF  
VEGETABLES, FRUITS  
AND CEREALS

2024 EDITION



# ITALIAN AGRICULTURAL PRODUCTION OUTSTANDING IN EUROPE AND GLOBALLY

This booklet is the 2024 edition of the statistical report realized within the partnership framework of Fondazione Edison (Edison Foundation) and Confagricoltura (General Confederation of Italian Agriculture).

As part of this collaboration, the report provides updated data and analyses on the strengths of Italian agriculture, highlighting its major role as a leading producer of vegetable products in Europe and globally.

Italy's agricultural excellence has been showcased with short films that explore a number of exceptional agri-foods: gorgonzola cheese, arugula, watermelons, broccoli and asparagus, artichokes, tomatoes and fennels.

This partnership which is very important to us, bring together Fondazione Edison's analyses

and studies with Confagricoltura's initiatives in a complex period, that nonetheless remains ripe with opportunities.

The report lists the leading Italian agricultural products. At the European level, we are one of major country in the added value provided by the producers of fresh fruits and vegetables, wine, rice and durum wheat. Furthermore, the quality of our products is considered to be outstanding at global level. The agri-food supply chain, from farm to consumer, is the largest supply chain in Italy with an annual turnover of approximately 570 billion euros, or about 13% of the total value of the Italian economy production.



While we are proud of these results, we are also convinced that an enormous potential remains to be exploited.

The annual domestic self-sufficiency rate is estimated at around 75%, and in terms of exports roughly 60 billion euros, which are lower than those of France, Germany and Spain. These three Countries on the other hand, as indicated in the report, register a lower added value of agriculture compared to Italy.

However, we are also recording a general decrease of agroalimentary international demand due to inflation and economy slowdown.

Some of Italy's obstacles are obvious and must be removed as quickly as possible to increase production, regain shares of the domestic

market and strengthen our international presence.

The most immediate obstacles that reduce the competitiveness of our products include the transport system, lack of supply chain integration, and the complex dialogue between science and business, despite the high quality of our researchers world-wide.

Our sector has been suffering from the absence of a cohesive national strategic vision for too long.

A national agricultural policy that efficiently implements the EU guidelines, is still needed.

In the current, ongoing, debate, environmental and economic sustainability are addressed with the assumption that increasing agricultural production will automatically lead to more



pollution and further strain natural resources as well as lead to a greater decline in biodiversity.

However, technological innovations – from biotechnology to precision farming – could in fact contribute to limiting, rather than worsening, the carbon footprint of agricultural production processes, as well as making companies more efficient and competitive.

Let us not forget, moreover, the growing role that our sector can play in the field of renewable energies to meet the international environmental objectives.

Throughout the health emergency, Italy has been able to count on its solid agri-food system. Supplies have always been guaranteed. When it will be time to look forward, beyond the pandemic once it is over, we must ensure that

we continue tapping into our potential for further growth, innovation and the creation of qualified jobs.

A greater awareness of our strengths, combined with actions that enhance our many excellences, many of which remain unknown beyond our borders, could represent the essential element that is missing from our agri-food policy.

This will require considerable work, also in terms of analyses and projects.

In this perspective, the collaboration with Fondazione Edison can be seen as an important asset.

**Massimiliano Giansanti**

*President of Confagricoltura*



# VEGETABLES, FRUIT AND CEREALS: THE LEADING ROLE OF ITALIAN AGRICULTURE

Italy has significantly modernized its international production specializations. In manufacturing it has led the revolution in interior design and home product design. It has conquered substantial market shares in fashion and luxury products, strengthened hundreds of hi-tech niches in machinery-transport equipment and pharmaceuticals, become a world leader in processed food products and wine.

The agricultural sector has actively transformed, now focusing on more high-end vegetable products, which has earned Italy a place among the leading producers in Europe.

In 2023 and 2024, Italian agriculture regained first place in Europe for value added generated.

The value added figure is more important than the production value because it is net of the intermediate costs incurred by the production sector and thus able to express the created wealth.

Italy secured first place in agricultural value added in 2013, surpassing France, and maintained this leadership uninterrupted until 2021. It ceded the top position back to France in 2022, and previous estimates suggested that we remained slightly behind our French counterparts in 2023 as well. However, new Eurostat and Istat data show that our country had already regained first place in the European Union for agricultural value added in 2023 and further consolidated this leadership in 2024.



In detail, Italian agriculture in 2024 achieved an agricultural value added of 42.4 billion euros, ahead of Spain, which rose to second place with 39.5 billion euros, France with 35.1 billion (which has been declining for two years and has fallen to third place), Germany with 31.9 billion, the Netherlands with 16.2 billion, and Poland with 13.4 billion.

Thus, Italy generated more than one-sixth of the entire value added by EU agriculture in 2024: of the estimated total of 233.6 billion euros, Italy's share was 18.2%, whereas Spain's was 16.9%, France's was 15.0%, and Germany's was 13.7%. It is important to consider that the value added generated in Italy originates from agricultural production that is high in quality and quantity, with relatively limited subsidies.

Indeed, Italian agriculture is the least subsidized of all major European countries both in absolute terms and in relation to value added, as reported by the European statistical office.

Regarding this last point, it should be noted that in 2024 the total amount of agricultural subsidies for production in the EU was around 50.8 billion euros. In absolute values, the country that received the largest amount of agricultural subsidies (including national and European Union subsidies) was France with 8.6 billion, followed by Germany with 7.0 billion, and Spain with 5.6 billion.

Italy received 5.2 billion. Therefore, of the major EU agricultural producers, Italy had the lowest ratio between production subsidies and value added agriculture. In 2024 the ratio was 24.5%



in France, 21.9% in Germany, 14.3% in Spain and just 12.3% in Italy, compared to the EU average of 21.7%.

Italian agriculture can proudly boast many excellent “Made in Italy” products when it comes to fresh produce and animal products. Moreover, agricultural products that are part of the Mediterranean and thus the Italian diet – vegetables, fruits and cereals – play a major role domestically, at the European level and globally. For example, Italy is the world’s top producer of artichokes, fennel bulbs, broccoli rabe, wine grapes and bergamot, thanks to regions like Apulia, Sicily, Sardinia, Campania, Lazio, Tuscany, Veneto and Calabria. Italians are also the world’s leading per capita consumers of these products.

An analysis conducted by Fondazione Edison of the main European crops reveals that for 41 agricultural products, Italy is one of the top 3 producers in the European Union, in stiff competition with Spain and France. More in detail: Italy is the top EU producer of 16 products, the second largest producer of 19 products and the third most important producer of 6 other products.

Italy is the EU’s top producer of many vegetables typical of the Mediterranean diet, including tomatoes, fennel bulbs, artichokes, eggplants, broccoli rabe, endives and spinach. When it comes to fruit Italy also excels in many important crops: from grapes for table use to kiwis, apricots, muskmelons, hazelnuts,





bergamot, and pears for processing. Italy is also the top EU producer of durum wheat and rice. Furthermore, Italy is the EU's second biggest producer of courgettes and marrows, lettuces, cauliflower and broccoli, fresh beans, chicory for fresh consumption, celery, and asparagus. It is also second in the production of grapes for wine, apples for fresh consumption, oranges, clementines, yellow lemons, peaches, nectarines, figs, olives for oil, watermelons, almonds, and chestnuts.

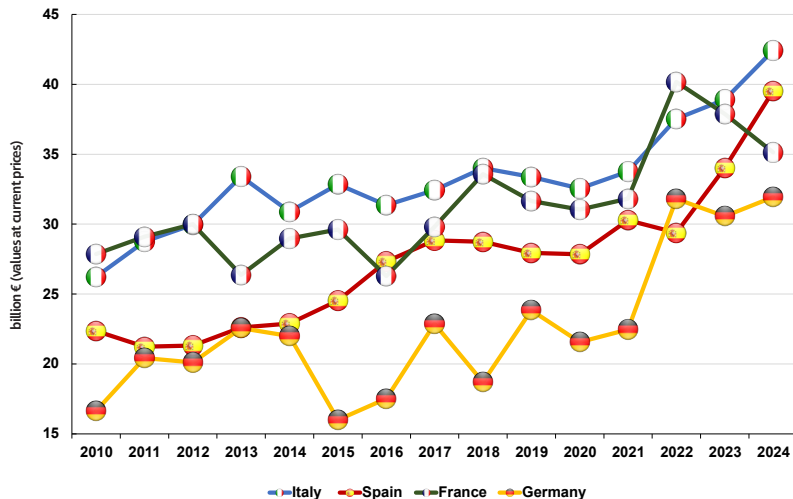
Finally, Italy holds third place in Europe for the production of chickpeas, lentils and other fresh pulses, radishes, garlic, strawberries grown in greenhouses, sweet cherries and olives for table use.

**Marco Fortis**

*Vicepresident of Fondazione Edison*



# VALUE ADDED IN AGRICULTURE FOR EUROPEAN COUNTRIES (2010 - 2024\*)








\*2024 estimated data

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat



# EUROPEAN AGRICULTURE: VALUE ADDED AND SUBSIDIES

(year 2024)

		SUBSIDIES ON PRODUCTION * (billion €)	SUBSIDIES ON PRODUCTION / GROSS VALUE ADDED (percentage values)
	EU 27	50.8	21.7%
	FRANCE	8.6	24.5%
	GERMANY	7.0	21.9%
	SPAIN	5.6	14.3%
	ITALY	5.2	12.3%



















\*2024 estimated data

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

# ITALY IS THE **FIRST** EU PRODUCER OF...

(year 2023)

 TOMATOES	 GRAPES FOR TABLE USE	 DURUM WHEAT
 FENNEL AND OTHER ROOTS, TUBERS AND BULBS N.E.C.	 KIWIS	 RICE
 ARTICHOCKES	 APRICOTS	
 EGGPLANTS	 MUSKMELONS	
 BROCCOLI RABE AND OTHER BRASSICAS N.E.C.	 HAZELNUTS	
 ENDIVES	 BERGAMOT AND OTHER CITRUS FRUITS N.E.C.	
 SPINACH	 PEARS FOR PROCESSING	



Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

# ITALY IS THE **SECOND** EU PRODUCER OF...





(year 2023)

 COURGETTES AND MARROWS	 APPLES FOR FRESH CONSUMPTION	 WATERMELONS
 LETTUCES	 ORANGES	 ALMONDS
 CAULIFLOWER AND BROCCOLI	 CLEMENTINES	 CHESTNUTS
 FRESH BEANS	 YELLOW LEMONS	
 CHICORY FOR FRESH CONSUMPTION	 PEACHES	
 CELERY	 NECTARINES	
 ASPARAGUS	 FIGS	
 GRAPES FOR WINE	 OLIVES FOR OIL	



# ITALY IS THE **THIRD** EU PRODUCER OF...

(year 2023)

	CHICKPEAS, LENTILS AND OTHER FRESH PULSES N.E.C.		GARLIC		SWEET CHERRIES
	RADISHES		STRAWBERRIES (GROWN IN GREENHOUSES)		OLIVES FOR TABLE USE





THE LARGEST EU PRODUCERS OF VEGETABLES

# THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2023, 1000 tonnes)



## TOMATOES

1



ITALY

6,016

2



SPAIN

3,968

3



PORTUGAL

1,813



## FENNEL AND OTHER ROOTS, TUBERS AND BULBS N.E.C.

1



ITALY

569

2



POLAND

187

3



SPAIN

86



# THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2023, 1000 tonnes)



## ARTICHOKES

1



ITALY

370

2



SPAIN

183

3



FRANCE

23



## EGGPLANTS

1



ITALY

318

2



SPAIN

260

3



ROMANIA

65



# THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2023, 1000 tonnes)



## BROCCOLI RABE AND OTHER BRASSICAS N.E.C.

1



ITALY

229

2



SPAIN

108

3



GERMANY

103



## ENDIVES

1



ITALY

195

2



SPAIN

69

3



FRANCE

26



# THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2023, 1000 tonnes)



## SPINACH

1



ITALY

103

2



BELGIUM

82

3



SPAIN

82



## COURGETTES AND MARROWS

1



SPAIN

566

2



ITALY

561

3



FRANCE

144



# THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2023, 1000 tonnes)



## LETTUCES

1



SPAIN

863

2



ITALY

513

3



GERMANY

207



## CAULIFLOWER AND BROCCOLI

1



SPAIN

637

2



ITALY

355

3



FRANCE

209




# THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2023, 1000 tonnes)



## FRESH BEANS

1		FRANCE	316
---	---	--------	-----


2		ITALY	152
---	---	-------	-----

3		SPAIN	119
---	---	-------	-----



## CHICORY FOR FRESH CONSUMPTION

1		FRANCE	191
---	---	--------	-----

2		ITALY	137
---	---	-------	-----

3		NETHERLANDS	40
---	---	-------------	----



# THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2023, 1000 tonnes)



## CELERY

1



SPAIN

141

2



ITALY

91

3



FRANCE

29



## ASPARAGUS

1



GERMANY

112

2



ITALY

52

3



SPAIN

44



# THE LARGEST EU PRODUCERS OF VEGETABLES


(year 2023, 1000 tonnes)



## CHICKPEAS, LENTILS AND OTHER FRESH PULSES N.E.C.

1		FRANCE	44
---	---	--------	----

2		POLAND	41
---	---	--------	----


3		ITALY	38
---	---	-------	----



## RADISHES

1		GERMANY	97
---	---	---------	----

2		FRANCE	45
---	---	--------	----

3		ITALY	31
---	---	-------	----



# THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2023, 1000 tonnes)



## GARLIC

1



SPAIN

194

2



FRANCE

29

3



ITALY

27







THE LARGEST EU PRODUCERS OF FRUITS

# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## GRAPES FOR TABLE USE

1		ITALY	799
---	---	-------	-----

2		SPAIN	348
---	---	-------	-----

3		GREECE	152
---	---	--------	-----



## KIWIS

1		ITALY	391
---	---	-------	-----

2		GREECE	317
---	---	--------	-----

3		FRANCE	50
---	---	--------	----



# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## APRICOTS

1



ITALY

207

2



FRANCE

128

3



SPAIN

108



## MUSKMELONS

1



ITALY

763

2



SPAIN

517

3



FRANCE

323



# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## HAZELNUTS

1



ITALY

103

2



FRANCE

17

3



POLAND

11



## BERGAMOT AND OTHER CITRUS FRUITS N.E.C.

1



ITALY

28

2



GREECE

12

3



SPAIN

2

# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## PEARS FOR PROCESSING

1



ITALY

26

2



AUSTRIA

24

3



SPAIN

21



## GRAPES FOR WINE

1



FRANCE

6,163

2



ITALY

5,845

3



SPAIN

4,474



# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## OLIVE FOR OIL


1  SPAIN 4,643

2  ITALY 2,312

3  PORTUGAL 1,176



## APPLES FOR FRESH CONSUMPTION

1  POLAND 2,312

2  ITALY 2,138

3  FRANCE 1,434



# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## ORANGES

1



SPAIN

2,715

2



ITALY

1,836

3



GREECE

866



## CLEMENTINES

1



SPAIN

1,056

2



ITALY

673

3



GREECE

171



# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## YELLOW LEMON

1  SPAIN 1,145

2  ITALY 472

3  GREECE 73



## FIGS

1  SPAIN 40

2  ITALY 13

3  GREECE 8





# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## PEACHES

1



SPAIN

843

2



ITALY

724

3



GREECE

454



## NECTARINES

1



SPAIN

539

2



ITALY

310

3



GREECE

121



# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## WATERMELONS

1  SPAIN 1,169

2  ITALY 752

3  GREECE 396



## ALMONDS

1  SPAIN 298

2  ITALY 78

3  PORTUGAL 70



# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## CHESTNUTS

1		SPAIN	174
---	---	-------	-----

2		ITALY	70
---	---	-------	----

3		GREECE	35
---	---	--------	----



## STRAWBERRIES (GROWN IN GREENHOUSES)

1		SPAIN	322
---	---	-------	-----

2		GREECE	105
---	---	--------	-----

3		ITALY	91
---	---	-------	----

# THE LARGEST EU PRODUCERS OF FRUITS

(year 2023, 1000 tonnes)



## SWEET CHERRIES



1 GREECE

114



2 SPAIN

104



3 ITALY

88



## OLIVES FOR TABLE USE



1 SPAIN

458



2 GREECE

260



3 ITALY





85



THE LARGEST EU PRODUCERS OF CEREALS TYPICAL OF THE MEDITERRANEAN DIET

# THE LARGEST EU PRODUCERS OF CEREALS TYPICAL OF THE MEDITERRANEAN DIET

(year 2023, 1000 tonnes)

 DURUM WHEAT			
1		ITALY	3,829
2		FRANCE	1,286
3		GREECE	963

 RICE			
1		ITALY	1,379
2		SPAIN	334
3		GREECE	190



This booklet was compiled by Marco Fortis, with the collaboration of  
Stefano Corradini and Andrea Sartori (Fondazione Edison)

February 2025





## THE ITALIAN AGRO-FOOD WORLD

The importance and quality of the production of vegetable, fruit and cereal - that are part of the Mediterranean diet - and of the transformation of agricultural products, characterize Italy's agri-food heritage and contribute to representing it abroad.

Fondazione Edison and Confagricoltura are producing a series of short films (in English and Italian) dedicated to "The Italian agri-food world"; they constitute an innovative approach to showcasing and exploring Italian excellence in food and agriculture.



Trailer



Tomatoes



Broccoli and asparagus



Watermelons



Fennels



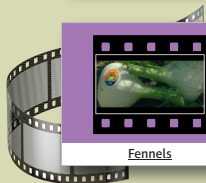
Artichokes



Arugula/Rocket



Gorgonzola cheese







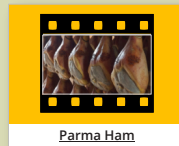
## THE ITALIAN AGRO-FOOD WORLD



Cultivating Excellence



Parmigiano Reggiano cheese



Parma Ham

*Further short films to follow*



## IL MONDO AGROALIMENTARE ITALIANO

L'importanza e la qualità delle produzioni di ortaggi, frutta e cereali, legate alla dieta mediterranea, e di quelle di prima trasformazione caratterizzano il patrimonio agroalimentare dell'Italia e contribuiscono a rappresentarlo all'estero.

Fondazione Edison e Confagricoltura stanno realizzando una serie di minifilm (in italiano e in inglese) dedicati a "Il mondo agroalimentare italiano", nella convinzione che essi costituiscano una modalità innovativa per esplorare e valorizzare le eccellenze agricole e alimentari del made in Italy.



Trailer



Pomodoro



Broccoli e Asparagi



Cocomero



Finocchio



Carciofo



Rucola

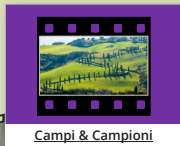


Gorgonzola





## IL MONDO AGROALIMENTARE ITALIANO



*Seguiranno altri minifilm*





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