



FONDAZIONE
EDISON



Confagricoltura

ITALY'S STRENGTHS IN AGRICULTURE:

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

2023 EDITION



ITALIAN AGRICULTURAL PRODUCTION OUTSTANDING IN EUROPE AND GLOBALLY

This booklet is the 2023 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, brings 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 the major countries 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 the 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 25% of gross domestic product.



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 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

In recent years 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; it has strengthened hundreds of hi-tech niches in machinery-transport equipment and pharmaceuticals; and it has become a world leader in processed food products and wine.

The agricultural sector has also experienced a deep transformation; it is now focusing in particular on more high-end vegetable products, which has gained Italy a place among leading producers in Europe.

Indeed, from 2012 to 2022 Italy was the rather stable leader in the sector at the European Union level, almost

always ahead of its rival France, even if at times only by a small margin.

In 2022 Eurostat estimated the value added of Italian agriculture at 37.2 billion euros. This figure enabled Italy to retain the second position in the EU, behind France (43.5 billion), but ahead Germany (30.2 billion) and Spain (28.3 billion).

Italy in 2022 generated nearly one-sixth of the entire value added by EU agriculture: of the estimated total of 222.3 billion euros, Italy's share was 16.7% whereas France's was 19.6%, Germany's was 13.6% and Spain's was 12.7%. It is important to consider that the value added generated in Italy originates with 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 (EUROSTAT).

Regarding this last point, it should be pointed out that in 2022 the total amount of agricultural subsidies for production in the EU was around 51.7 billion euros. In absolute values, the country which received the largest amount of agricultural subsidies (including national and European Union subsidies) was France with 8.1 billion, followed by Germany with 6.7 billion and Spain with 5.9 billion.

Italy received 5.0 billion. Therefore, of the major EU agricultural producers, Italy had the lowest ratio between production subsidies and value added agriculture.

In 2022 the ratio was 22.2% in Germany, 20.8% in Spain, 18.5% in France and just 13.6% in Italy, compared to the EU average of 23.3%.

Italian agriculture can boast of 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 also globally.

For example, Italy is the world's top producer of artichokes, fennel bulbs, broccoli rabe, wine grape 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 42 agricultural products, Italy is one of the 3 top producers in the European Union, in stiff competition with Spain and France. More in detail: Italy is the top EU producer of 18 products, the second largest producer of 19 products and the third most important producer of 5 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 and endives. When it comes to fruit Italy also excels in many important crops: from grapes for wine and table use to pears for fresh consumption, peaches, nectarines, apricots, kiwis, bergamot, muskmelons and hazelnuts. Italy is also the top EU producer of rice and durum wheat.

Furthermore, Italy is the EU's second biggest producer of lettuces, courgettes and marrows, cauliflower and broccoli, chicory for fresh consumption, fresh beans, celery asparagus and garlic. It is also second in the production of olives for oil, apples for fresh consumption, oranges, clementines, yellow lemons, sweet cherries, figs, plums, watermelons, almonds, and chestnuts.

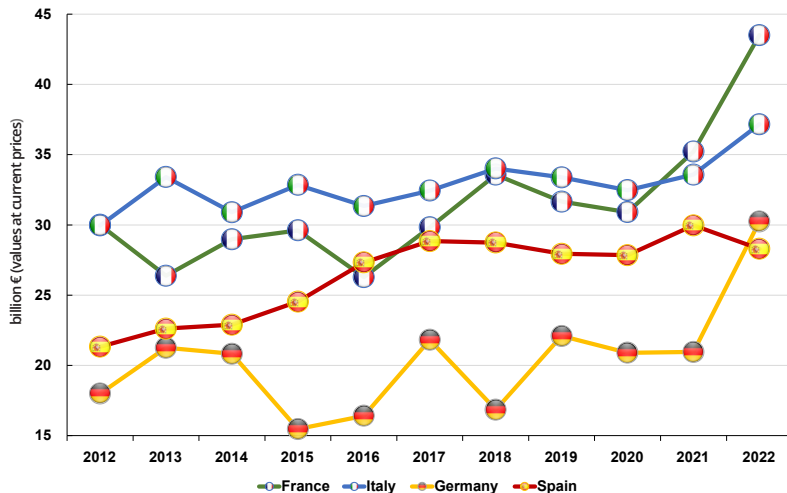
Finally, Italy holds third place in Europe for the production of spinach, radishes, olives for table use, strawberries grown in greenhouses, chickpeas, lentils and other fresh pulses.

Marco Fortis

Vicepresident of Fondazione Edison



VALUE ADDED IN AGRICULTURE FOR MAJOR EUROPEAN COUNTRIES (2012 - 2022*)








*2022 estimated data

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



EUROPEAN AGRICULTURE: VALUE ADDED AND SUBSIDIES

(year 2021)

		SUBSIDIES ON PRODUCTION * (billion €)	SUBSIDIES ON PRODUCTION / GROSS VALUE ADDED (percentage values)
	EU 27	51.7	23.3
	FRANCE	8.1	18.5
	GERMANY	6.7	22.2
	SPAIN	5.9	20.8
	ITALY	5.0	13.6



















*2022 estimated data

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



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

(year 2022)

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

NOTE: * 2021 DATA

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



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

(year 2022)

 LETTUCES	 APPLES FOR FRESH CONSUMPTION	 WATERMELONS
 COURGETTES AND MARROWS	 ORANGES	 ALMONDS
 CAULIFLOWER AND BROCCOLI	 CLEMENTINES *	 CHESTNUTS
 CHICORY FOR FRESH CONSUMPTION	 YELLOW LEMONS *	
 FRESH BEANS	 SWEET CHERRIES	
 CELERY	 FIGS	
 ASPARAGUS	 PLUMS	
 GARLIC	 OLIVES FOR OIL	

NOTE: * 2021 DATA

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



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

(year 2022)

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













THE LARGEST EU PRODUCERS OF VEGETABLES

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2022, thousands of tons)

 TOMATOES			
1		ITALY	6,136
2		SPAIN	3,649
3		PORTUGAL	1,406

 FENNEL AND OTHER ROOTS, TUBERS AND BULBS N.E.C.			
1		ITALY	389
2		POLAND	212
3		FRANCE	100



THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2022, thousands of tons)


 ARTICHOKES			
1		ITALY	378
2		SPAIN	200
3		FRANCE	22

 EGGPLANTS			
1		ITALY	307
2		SPAIN	276
3		NETHERLANDS	66



THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2022, thousands of tons)

 BROCCOLI RABE AND OTHER BRASSICAS N.E.C.			
1		ITALY	249
2		SPAIN	132
3		GERMANY	110

 ENDIVES			
1		ITALY	153
2		SPAIN	85
3		FRANCE	26




THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2022, thousands of tons)



ASPARAGUS

1  GERMANY 110


2  ITALY 52


3  SPAIN 45



LETTUCES

1  SPAIN 967

2  ITALY 469

3  GERMANY 232



THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2022, thousands of tons)



COURGETTES AND MARROWS

1



SPAIN

618

2



ITALY

559

3



FRANCE

158



CAULIFLOWER AND BROCCOLI

1



SPAIN

677

2



ITALY

352

3



FRANCE

211




THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2022, thousands of tons)



CHICORY FOR FRESH CONSUMPTION

1		FRANCE	208
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2		ITALY	162
---	---	-------	-----

3		NETHERLAND	50
---	---	------------	----



FRESH BEANS

1		FRANCE	378
---	---	--------	-----

2		ITALY	147
---	---	-------	-----

3		SPAIN	134
---	---	-------	-----




THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2022, thousands of tons)




1		SPAIN	160
---	---	-------	-----

2		ITALY	90
---	---	-------	----

3		FRANCE	27
---	---	--------	----



1		SPAIN	282
---	---	-------	-----

2		ITALY	28
---	---	-------	----

3		ROMANIA	21
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THE LARGEST EU PRODUCERS OF VEGETABLES


(year 2021, thousands of tons)



SPINACH

1  BELGIUM 123

2  FRANCE 114


3  ITALY 97



RADISHES

1  GERMANY 97

2  FRANCE 50

3  ITALY 30



THE LARGEST EU PRODUCERS OF VEGETABLES


(year 2022, thousands of tons)



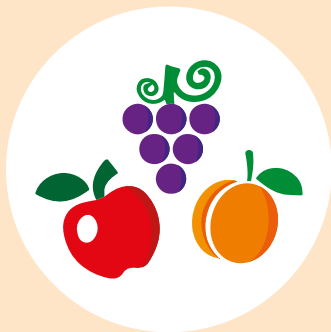
CHICKPEAS, LENTILS AND OTHER FRESH PULSES

1		POLAND	49
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2		SPAIN	44
---	---	-------	----

3		ITALY	39
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THE LARGEST EU PRODUCERS OF FRUITS

THE LARGEST EU PRODUCERS OF FRUITS









(year 2022, thousands of tons)

 GRAPES FOR WINE				 GRAPES FOR TABLE USE			
1		ITALY	7,445	1		ITALY	966
2		FRANCE	6,112	2		SPAIN	292
3		SPAIN	5,609	3		GREECE	273



THE LARGEST EU PRODUCERS OF FRUITS







(year 2022, thousands of tons)

 PEACHES				 NECTARINES			
1		ITALY	772	1		ITALY	379
2		GREECE	750	2		SPAIN	312
3		SPAIN	558	3		GREECE	127



THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)

KIWIS				APRICOTS			
1		ITALY	523	1		ITALY	230
2		GREECE	307	2		FRANCE	128
3		PORTUGAL	53	3		GREECE	126



THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)



PEARS FOR FRESH CONSUMPTION

1  ITALY 445

2  NETHERLAND 351


3  BELGIUM 346



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

1  ITALY 28

2  GREECE 12

3  SPAIN 0.3

NOTE: * 2021 DATA



THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)

 MUSKMELONS			
1		ITALY	590
2		SPAIN	524
3		FRANCE	308

 HAZENULTS			
1		ITALY	99
2		FRANCE	10
3		POLAND	10




THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)



APPLES FOR FRESH CONSUMPTION

1  POLAND 2,649

2  ITALY 2,125

3  FRANCE 1,302



SWEET CHERRIES

1  SPAIN 116

2  ITALY 108

3  GREECE 94



THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)



ORANGES

1  SPAIN 3,014

2  ITALY 1,959

3  GREECE 891



CLEMENTINES *

1  SPAIN 994

2  ITALY 674

3  GREECE 145

NOTE: * 2021 DATA



THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)



YELLOW LEMONS*

1



SPAIN

1,014

2



ITALY

466

3



GREECE

86



FIGS

1



SPAIN

44

2



ITALY

9

3



GREECE

9

NOTE: * 2021 DATA



THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)



PLUMS

1  ROMANIA 659

2  ITALY 187

3  SPAIN 157



WATERMELONS

1  SPAIN 1,165

2  ITALY 657

3  GREECE 319



THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)



CHESTNUTS

1  SPAIN 174

2  ITALY 57

3  GREECE 34



ALMONDS

1  SPAIN 229

2  ITALY 75

3  PORTUGAL 35



THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)



OLIVES FOR OIL

1  SPAIN 3,678

2  ITALY 2,834

3  GREECE 1,028



OLIVES FOR TABLE USE

1  SPAIN 262

2  GREECE 250

3  ITALY 95

THE LARGEST EU PRODUCERS OF FRUITS

(year 2022, thousands of tons)



STRAWBERRIES (GROWN IN GREENHOUSES)

1		SPAIN	321
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2		GREECE	94
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3		ITALY	69
---	---	-------	----





THE LARGEST EU PRODUCERS OF CEREALS TYPICAL OF THE MEDITERRANEAN DIET

THE LARGEST EU PRODUCERS OF CEREALS TYPICAL OF THE MEDITERRANEAN DIET

(year 2022, thousands of tons)

 DURUM WHEAT			
1		ITALY	3,831
2		FRANCE	1,325
3		SPAIN	658

 RICE *			
1		ITALY	1,459
2		SPAIN	617
3		GREECE	242

NOTE: * 2021 DATA



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

july 2023





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](#)

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](#)

Seguiranno altri minifilm





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