



Ministero degli Affari Esteri
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OpportunItaly
Accelerating the Food & Beverage industry

Italian agrifood: excellence that creates a cohesive system



Dedicated to the *Agrifood sector*

Edited by **dst. dentsu** and **CARAT**, in collaboration with Il Sole 24 Ore Radiocor

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The flagship of Italian production

The Italian agrifood sector, a strategic and inherently resilient sector, exerts **significant influence in Europe and world-wide**, standing out for **its robust figures and strong competitive capacity** even against a backdrop of uncertainty caused by a combination of geopolitical and meteorological turbulence¹. In 2025, the **value added by agriculture, forestry and fisheries remained broadly stable**: in the first three quarters of the year, the year-on-year change at constant prices was down 0.2%², up 0.1%³ and up 0.6%⁴. In 2024, growth had been more robust, with a **volume increase of 2.0% on 2023**, reaching **€43.9 billion** at current prices⁵. Looking at agriculture alone (€39.7 billion), Italy ranked **first in the European Union in terms of value added generated**, accounting for **17.4%** of the EU total⁶, confirming the country's central role in the European market. The **processing sector also remained strong**: the **food industry's production index rose by 4.5% in the first nine months of the year**⁷. Data on value added for 2025 is not yet available, but in 2024 the sector record-

ed growth of **3.2% at constant prices**, reaching nearly **€38 billion** and placing Italy **third in the EU**, behind Germany and France⁸. Overall, agriculture and the food industry generated **€81.9 billion in value added** in 2024, equivalent to **4.2% of national GDP**⁹. Taking into account the entire extended supply chain (which includes logistics, transport, distribution and catering), this contribution rises to **15% of GDP**, confirming the systemic role of the agrifood sector in the Italian economy and its ability to support growth, employment and competitiveness on international markets¹⁰. The 'Made in Italy' agrifood sector is the product of an integrated system that uniquely combines natural factors, production practices, culture and regulation. The country's diverse topography and climate have fostered the development of **distinctive products**. The regulatory framework, at both European and national levels—including **GI** (Geographical Indication) **certifications**, the **CAP** (Common Agricultural Policy) and **rural development programmes**—has created a stable and favourable

environment with measures to **protect and promote these products, thereby ensuring high-quality standards**. In 2026, Italy ranked first in Europe for the **number of PDO** (Protected Designation of Origin), **PGI** (Protected Geographical Indication) and **TSG** (Traditional Speciality Guaranteed) **agrifood products**, with 897 recognised designations (331 food products and 566 wines and spirits)¹¹, with a total value of **€20.84 billion**¹². At the start of 2026, Italy's primary sector—covering agriculture, forestry and fisheries—consists of **668,553 enterprises**¹³ with the majority located in the South (46.5%), followed by Northern Italy (36.6%) and Central Italy (16.9%)¹⁴. Alongside these are the **57,545 enterprises in the food and drink industry**¹⁵, with a similar distribution: the South (48.7%), the North (35.9%) and the Centre (15.4%)¹⁶. Overall, the primary sector employs **986,567 workers**, up by 1.1% year-on-year¹⁷, whilst the food and drink industry employs **504,278 workers**, up by 2.5%¹⁸. In the first eleven months of 2025, Italian agrifood exports reached nearly **€67 billion**, up **5%** year-on-year, compared with 3.1% growth in total national exports¹⁹. Forecasts suggest a **year-end figure of around €73 billion**, setting a new record and consolidating the growth trend of recent years²⁰. In 2024, exports had reached **€70 billion**, accounting for **11% of Italy's total exports**²¹, ranking second only to the mechanical engineering sector and ahead of strategic

sectors such as textiles, metals and transport²². This marks the start of a **new phase of growth**, following a decade of gradual structural consolidation within the sector. Between 2015 and 2024, Italian agrifood exports increased by a total of **87%**, compared with a **59%** rise in imports, signalling a **rebalancing of the trade balance**: the agrifood balance has shifted from a **deficit of €6 billion in 2015 to a surplus of around €1 billion in 2024**²³. According to the latest

Sources:

¹ Ismea, Rapporto sull'agroalimentare italiano 2025, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13704> accessed on 02/03/2026

² Ismea, AgriMercati I trimestre 2025, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13541> accessed on 02/03/2026

³ Ismea, AgriMercati II trimestre 2025, 2026, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13753> accessed on 02/03/2026

⁴ Ismea, AgriMercati III trimestre 2025, 2026, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13754> accessed on 02/03/2026

^{5,6} Ismea, Rapporto sull'agroalimentare italiano 2025, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13704> accessed on 02/03/2026

⁷ Ismea, AgriMercati ISMEA, III trimestre 2025: crescono il valore dell'agroalimentare italiano e l'export, con un nuovo record verso i 73 miliardi, 2026, <https://www.ismea.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13544> accessed on 02/03/2026

^{8,9,10} Ismea, Rapporto sull'agroalimentare italiano 2025, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13704> accessed on 02/03/2026

^{11,12} Fondazione QualiVita, Osservatorio Italia, 2026, <https://www.qualivita.it/osservatorio/osservatorio-ita/> accessed on 02/03/2026

^{13,14,15,16,17,18} Camera di Commercio delle Marche, Open Data Explorer - Demografia delle Imprese in Italia (Imprese attive, Quote, Settore A), 31/12/2025, <https://opendata.marche.camcom.it/pivot-table.htm?geo=Italia&ag=pr&tb=hmc> accessed on 02/03/2026

^{19,20} Ismea, AgriMercati ISMEA, III trimestre 2025: crescono il valore dell'agroalimentare italiano e l'export, con un nuovo record verso i 73 miliardi, 2026, <https://www.ismea.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13544> accessed on 02/03/2026

²¹ Ismea, Rapporto sull'agroalimentare italiano 2025, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13704> accessed on 02/03/2026

²² Istat, CPA Ateco 2007 dati annuali e mensili a livello nazionale, 2025, https://esploradati.istat.it/coeweb/databrowser/#/it/coe/categories/CPATECO2007COE/IT1_DF_DCSE_CPA_ATE_CO2007_COE_A_M_CONJ1.0 accessed on 07/10/2025

EXCELLENCE HANDED DOWN AND RENEWED

Italian food is growing in exports and innovation, ecological transition, digital traceability and protection of denominations.

73

BILLION EUROS
IN EXPORTS

11%

OF TOTAL
NATIONAL
EXPORTS

897

QUALITY-LABELLED
PRODUCTS

1.49

MILLION
EMPLOYEES

available data, relating to 2024, the **European Union remains the leading destination market for the agrifood sector, accounting for 57.4% of exports**, with Germany, France and Spain leading the way²⁴. Among non-EU countries, the **United States stands out as the leading market, with a 17.1% increase** on the previous year. Exports are also particularly buoyant to Australia (15.5% increase year-on-year), Canada (up 14.2%) and Japan (up 13.7%), a sign of **growing global demand for Italian products with high added value**²⁵. The excellence of the Italian agrifood sector is not only the result of tradition, but also of a capacity for concrete innovation, as evidenced by the **more than 500 patents already registered in the field of alternative proteins alone**—such as pulses, seaweed, mushrooms and cultured meat²⁶. This dynamism reflects a system capable of networking through targeted internationalisation tools, and of

delivering an integrated, sustainable supply chain with a strong focus on traceability. This synthesis of deep-rooted traditions and forward-looking vision is what led **UNESCO to recognise Italian cuisine on 10 December 2025, inscribing it on the Representative List of the Intangible Cultural Heritage of Humanity**²⁷.

^{23,24,25} Ismea, Rapporto sull'agroalimentare italiano 2025, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13704> accessed on 02/03/2026

²⁶ Il Sole 24 Ore, Alimenti vegetali, già 500 brevetti. Cresce l'alleanza ricerca-industria, 2025, <https://www.ilsole24ore.com/art/alimenti-vegetali-gia-500-brevetti-cresce-l-alleanza-ricerca-industria-AGEC9m4C> accessed on 08/10/2025

²⁷ UNESCO, Decision of the Intergovernmental Committee: 20.COM 7.B.27, 2025, <https://ich.unesco.org/en/decisions/20.COM/7.B.27> accessed on 04/03/2026

^{28,29} Ismea, AgriMercati ISMEA, III trimestre 2025: crescono il valore dell'agroalimentare italiano e l'export, con un nuovo record verso i 73 miliardi, 2026, <https://www.ismea.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13544> accessed on 02/03/2026

The sector in numbers

World leaders in fine food

Despite the international turmoil and an increasingly unstable climate, **Italian agrifood exports** in the first eleven months of 2025 grew by 5%, reaching nearly **€67 billion**. Year-end projections forecast a figure of around **73 billion**, a **new record** following the more than 70 billion achieved in 2024²⁸. Coffee, bakery and

confectionery products, cheeses, hams and fresh fruit are the key drivers²⁹, reflecting a solid and diversified leadership built on globally recognised brands and expertise rooted in the local area. In the following paragraphs, we analyse the sectors that contribute the most to Italian exports in terms of value.

THE STRENGTH OF TERRITORIES, THE VALUE OF KNOW-HOW

Italian agrifood combines tradition and quality, short supply chains and global exports. It is a production system, cultural identity and a guardian of biodiversity.



Credits: Shutterstock, FreePik

Pasta, pizza and more

The **cereals and cereal products sector**, with pasta as its flagship product, is one of the cornerstones of the Italian agrifood industry, and the latest economic figures confirm its leading position. In November 2025, national exports across the entire supply chain reached **€9.65 billion**³⁰, showing a recovery of 2.3% thanks to higher agricultural yields and more favourable weather conditions. **Bakery and confectionery products**—among the sector's most significant segments—are strengthening their position in the markets: in the first eleven months of 2025, exports reached **€4.26 billion** (up 6.8%), a figure now close to that recorded for the whole of 2024 (€4.33 billion)³¹. The EU accounts for the largest share of exports (62.9%)³²; among the main non-EU partners, alongside the US and the UK, are Switzerland and Saudi Arabia³³. The **pasta sector** exceeded **€3.93 billion**³⁴, remaining at levels essentially stable year on year (**down 1.5%**)³⁵, with a year-end figure in line with 2024 (€4.33 billion)³⁶. Italy remains **the global leader in the sector** in terms of production and exports³⁷: almost two-thirds of demand comes from the EU (63.1% in 2025)³⁸, with Germany and France leading the way, whilst outside Europe the United States, the United Kingdom and Japan stand out³⁹, markets in which Italian pasta is perceived as synonymous with quality and tradition. There

are also positive signs from **the primary sector**: in 2025, **domestic durum wheat production** recorded a significant increase of 24% in volume compared with the previous year's harvest, totalling **4.37 million tonnes**⁴⁰. This result is attributable to an increase in the area under cultivation and, above all, in average yields per hectare in the main producing regions of Central and Southern Italy. Notable new trends include wholemeal pasta, gluten-free pasta and pasta made from pulses, reflecting **the growing focus of consumers on health and wellbeing**. **Gluten-free products** dominate the market, purchased by **more than one in five Italian households**, against a backdrop of around 265,000 (0.44% of the population) diagnosed cases of coeliac disease⁴¹—now definitively moved from pharmacies to the high street: the Italian market reached €400 million in 2025, with growth forecast to reach 1.6 billion by 2030⁴².

Italy in a bottle

In 2025, wine remained Italy's most exported agrifood product: in the first eleven months of the year, exports totalled **€7.20 billion**, marking a **3.6% decline** year over year⁴³. In 2024, exports totalled **€8.08 billion**⁴⁴. The main factor behind this decline is the **contraction of the US market**—historically the main buyer—which recorded an **8% fall** in value, totalling **€1.6 billion**⁴⁵. Germany, the United

Kingdom, Canada and Switzerland are among the other key markets⁴⁶. The sector currently faces an **uncertain outlook**, with geopolitical factors compounded by shifts in consumption patterns and growing climate pressures. Overall, however, the sector is holding up: even in 2025, Italy retains its **global lead in terms of production volume**, with **over 47 million hectolitres**⁴⁷ and, based on 2024 data, ranks second by value behind France⁴⁸. The entire supply chain employs **over 81,472 people** (2024)⁴⁹. The great wines—Prosecco, Barolo, Amarone, Pinot Grigio—drive dynamic wine-producing regions such as Conegliano Valdobbiadene, the Colli Fiorentini and the Veronese area. Alongside historic brands, wine start-ups are emerging, focusing on digital solutions, natural or low-alcohol wines, and innovative packaging, which are increasingly popular with young consumers. Underpinning the sector's strength are **530 PDO and PGI wines, 36 spirits with GI designation**⁵⁰ and a heritage of **80 native grape varieties** covering over 75% of Italian vineyards⁵¹.

Italian fruit and vegetables: from fresh produce to preserves

In the first eleven months of 2025, **Italian fruit and vegetables** achieved record exports, with a total value of **€11.78 bil-**

lion for fresh and processed products, representing a year-on-year increase of 6.1%⁵². The **fresh produce sector** is driving growth with **6.42 billion** (up **11.3%**)⁵³, whilst **processed fruit and vegetables** (preserves, purées, juices and purees) remain broadly stable at **5.35 billion** (up 0.5%)⁵⁴, with a positive trade balance of over 3.3 billion⁵⁵. Over the twenty-year period 2005–2025, the processed products sector recorded the best perfor-

^{30,31,32,33,34,35,36 | 38,39} Istat, Nomenclatura combinata (NC8) (quantità e valore) dati annuali e mensili, 2026 https://esploradati.istat.it/coeweb/databrowser/#/it/coe/categories/NC8/IT1,DF_DCSE_NC8_A_M_CONJ_2,1,0 accessed on 02/03/2026

³⁷ Il Sole 24 Ore, Italia in vetta per produzione, esportazione e consumo di pasta, 2026, <https://www.ilssole24ore.com/art/italia-vet-ta-produzione-esportazione-e-consumo-pasta-AI47CtN> accessed on 02/03/2026

⁴⁰ Italmopa, Risultati raccolto 2025 cited by Ansa in Italmopa, raccolto grano duro +24% in un anno, rese ed ettari su, 2025, https://www.ansa.it/canale_terraegusto/notizie/regioni/marche/2025/07/10/italmopa-raccolto-grano-duro-24-in-un-anno-rese-ed-ettari-su_f0ba2d62-c96d-4b25-841e-c0ad1b6d66bb.html accessed on 07/10/2025

⁴¹ Istituto Superiore di Sanità, Celiachia - Aspetti epidemiologici in Italia, 2023, <https://www.epicentro.iss.it/celiachia/epidemiologia-italia> accessed on 14/04/2026

⁴² Il Sole 24 Ore, Per i prodotti senza glutine vendite oltre 400 milioni (+6%), 2023, <https://www.ilssole24ore.com/art/per-prodotti-senza-glutine-vendite-oltre-400-milioni-6percento-AEtDYzqC> accessed on 14/04/2026

^{43,44,45,46} Istat, Nomenclatura combinata (NC8) (quantità e valore) dati annuali e mensili, 2026 https://esploradati.istat.it/coeweb/databrowser/#/it/coe/categories/NC8/IT1,DF_DCSE_NC8_A_M_CONJ_2,1,0 accessed on 02/03/2026

⁴⁷ Organizzazione Internazionale della Vigna e del Vino, Database, 2025, <https://www.oiv.int/it/what-we-do/data-discovery-report-oiv> accessed on 02/03/2026

⁴⁸ IMI Intesa Sanpaolo, Produzione ed export del vino italiano: trend e futuro, 2024, <https://imi.intesasnpaolo.com/it/insights/economind/settore-vitivinicolo-italiano-2024/> accessed on 07/10/2025

⁴⁹ Federvini, Report Federvini 2024, 2024, <https://www.federvini.it/assemblea-2025> accessed on 02/03/2026

⁵⁰ Fondazione QualiVita, Osservatorio Italia, 2026, <https://www.qualivita.it/osservatorio/osservatorio-ita/> accessed on 02/03/2026

⁵¹ IMI Intesa Sanpaolo, Produzione ed export del vino italiano: trend e futuro, 2024, <https://imi.intesasnpaolo.com/it/insights/economind/settore-vitivinicolo-italiano-2024/> accessed on 07/10/2025

^{52,53,54,55} Istat, Nomenclatura combinata (NC8) (quantità e valore) dati annuali e mensili, 2026, https://esploradati.istat.it/coeweb/databrowser/#/it/coe/categories/NC8/IT1,DF_DCSE_NC8_A_M_CONJ_2,1,0 accessed on 02/03/2026

mance, driven by **tinned tomatoes (209% increase year on year)**, **fresh vegetables (up 175%)** and **fruit (up 111%)**⁵⁶. A robust and diversified supply chain, supported by a wealth of **plant biodiversity unique** in Europe —accounting for around half of the species found on the continent— which plays a strategic role in environmental protection and the preservation of the land. The emerging trend is a growing focus on eco-friendly and compostable packaging, digital traceability and food education. Companies are also focusing on healthy **plant-based snacks** and **multi-purpose purées**, wrapped packaged in sustainable packaging and single-serving portions, ideal for new consumption patterns.

Italian cheese: a byword for quality

The country remains a key player in the European dairy sector: by mid-2025, Italy had become the **EU's leading exporter of cheese**, not only in value but also in volume⁵⁷. Data available for the first eleven months of the year show **exports of milk and cheese** totalling **€5.59 billion**, representing a year-on-year increase of **13.0%**⁵⁸; in 2024 as a whole, the sector had recorded **€5.40 billion**⁵⁹. Almost three-quarters of demand comes from EU countries (**73.5%**)⁶⁰, but there is also a positive

trend in numerous non-European markets: the United Kingdom, Canada, South Korea, Saudi Arabia and Australia, where growing demand confirms Italian cheeses as a global benchmark for quality and origin⁶¹. Italy also holds the **European record for the number of PDO, PGI or TSG cheeses**, with 57 recognised designations⁶², including Grana Padano, Parmigiano Reggiano, Gorgonzola and Mozzarella di Bufala Campana. **The most dynamic production regions** in 2025 are those of **eastern Lower Lombardy, Reggio Emilia, Parma and Campania**⁶³. The sector is characterised by high-quality products, biodiversity and a focus on sustainability, with growing investment in eco-friendly packaging and animal welfare. Among the innovations, there is a growing focus on cheeses formulated for consumers with food intolerances, alongside sustainable packaging and interactive solutions: digital technologies and features incorporated into the packaging itself, which allow consumers to engage directly with the product or the brand, transforming the packaging from a simple container into a channel for communication and service.

Chocolate and coffee: prices drive growth

Cocoa-based confectionery and coffee, two pillars of the Italian agrifood sector, are set to follow similar trends in 2025: **strong**

growth in export value, alongside a slight decline in volumes. This divergence largely reflects international price trends, linked to rising global demand (particularly for coffee), harvests affected by extreme weather events and instability in the commodities markets. In the case of **chocolate**, in the first eleven months of 2025 exports reached **€3.36 billion (21.8% increase year on year)** whilst volumes fell slightly by **1.7%**⁶⁴. In 2024, the sector had come close to €3 billion⁶⁵. Demand comes largely from EU countries (67.8%), with France, Germany, Poland, the United Kingdom and Spain among the main destinations⁶⁶. The market is gradually shifting towards **higher-end products**, where quality, specialist processing and product innovation strengthen competitive positioning. Segments linked to wellbeing, the use of alternative ingredients and packaging solutions suitable for e-commerce are also emerging. A similar trend is seen for **coffee**: in November 2025, exports reached **€3.01 billion (25.3% increase year on year)**, with volumes falling slightly by **2.0%**. For the whole of 2024, the value stood at €2.62 billion⁶⁷. Here too, demand is predominantly European (69.5%), with Germany, France, Poland, the United States and the United Kingdom among the main export markets⁶⁸.

Italy has been drawing liquid gold from the olive tree for thousands of years

In 2025, Italian exports of olive oil and derivatives followed an **asymmetrical trajectory: higher volumes, lower revenues**. In the first eleven months of the year, exports reached **325,000 tonnes**, representing a **19.7%** increase year on year⁶⁹, but the total value fell by 18.2% to **€2.2 billion**⁷⁰. By way of comparison, in the whole of 2024 Italy had exported **299,000 tonnes worth €2.93 billion**⁷¹.

⁵⁶ Coldiretti, Macfrut: export ortofrutta italiana al top con 12,2 MLD di euro, 2024, <https://www.coldiretti.it/notizie/macfrut-export-ortofrutta-italiana-al-top-con-122-ml-d-euro> accessed on 07/10/2025

⁵⁷ Il Sole 24 Ore, Formaggio, l'Italia diventa prima assoluta in Europa per export extra Ue, 2025, <https://www.ilssole24ore.com/art/formaggio-l-italia-diventa-prima-assoluta-europa-export-extra-ue-AHNveRPC> accessed on 02/03/2026

^{58,59,60} Istat, Nomenclatura combinata (NC8) (quantità e valore) dati annuali e mensili, 2026 https://esploradati.istat.it/coeweb/databrowser/#/it/coe/categories/NC8/IT1,DF_DCSE_NC8_A_M_CONJ_2,1,0 accessed on 02/03/2026

⁶¹ Ministero dell'Agricoltura, della Sovranità Alimentare e delle Foreste (MASAF), Formaggi: Italia primo esportatore Ue, 2025, <https://www.masaf.gov.it/formaggi-italia-primo-esportatore-ue> accessed on 02/03/2026

⁶² Fondazione QualiVita, Osservatorio Italia, 2026, <https://www.qualivita.it/osservatorio/osservatorio-ita/> accessed on 03/03/2026

⁶³ Intesa Sanpaolo, Monitor dei distretti agroalimentari gennaio 2026, 2026, <https://group.intesasanpaolo.com/it/research/monitor-dei-distretti-agroalimentari> accessed on 03/03/2026

^{64,65,66,67,68,69,70,71} Istat, Nomenclatura combinata (NC8) (quantità e valore) dati annuali e mensili, 2026, https://esploradati.istat.it/coeweb/databrowser/#/it/coe/categories/NC8/IT1,DF_DCSE_NC8_A_M_CONJ_2,1,0 accessed on 02/03/2026

The gap between volumes and revenue reflects market dynamics which, over the course of the year, have driven **prices down**, putting pressure on the Italian market⁷². Italy is currently the **world's second-largest exporter of olive oil** after Spain, a position threatened by the growth in supply from Tunisia⁷³. The sector is supported by the strength and diversification of its export markets: over **61%** of demand comes from non-EU countries⁷⁴. According to data available in November 2025, the United States remains the leading market, accounting for 28.9% of the value of exports, followed by Germany, France, Canada and Japan⁷⁵. The main production regions in the sector include Tuscany, the Bari area and Umbria⁷⁶. Long-established brands are joined by new premium labels, often aimed at niche gourmet markets. The range is further enriched by organic oils, eco-friendly packaging and small-sized packs for on-the-go consumption.

Hams, sausages and mortadella: Italian meat is appreciated everywhere

With exports reaching **628,000 tonnes** in November 2025 (**5.4% increase year on year**) and **€3.94 billion** (**11.9% increase**)⁷⁷, the **meat and meat products sector** remains one of the most dynamic in the Italian agrifood industry, underpinned

by globally recognised flagship products such as Prosciutto di Parma and San Daniele. In 2024, the sector recorded trade volumes of **647,000 tonnes** and a value of **3.86 billion**⁷⁸. In 2025, over 75% of demand came from EU countries, with Germany, France, Spain, the United Kingdom and the United States among the main export markets⁷⁹. Among **Italian cured meats**, those enjoying the greatest success abroad are, in order: raw hams, sausages and matured salami, mortadella, cotechini and zampone and cooked hams⁸⁰.

At the same time, initiatives relating to digital traceability and organic meat are gaining ground, with the aim of ensuring safety and sustainability throughout the supply chain. The sector is committed to reducing its environmental impact, improving energy efficiency and combating food waste, through the adoption of innovative practices and the use of artificial intelligence.

Good for the environment, good for people

Organic farming deserves a special mention, given Italy's leading position in Europe: with **84,000 certified farms**—more than double the number in Germany and a third more than in France— **almost one in five fields (19%) in the country is cultivated using organic methods**⁸¹. This production

leadership is also reflected in the domestic market: by 2025, organic sales in Italy had reached **€6.9 billion**, of which 5.5 billion was accounted for by domestic consumption⁸². In the catering sector, **more than eight out of ten establishments use organic ingredients**, particularly fruit and vegetables, extra virgin olive oil, preserves, milk and honey, and 85% offer organic wines⁸³. The main factors driving restaurateurs' choices are **premium positioning (51%)**, an **ethical and sustainability-focused approach (46%)** and **consumers' growing focus on wellbeing (40%)**⁸⁴.

⁷² Il Sole 24 Ore, Coldiretti: l'olio dalla Tunisia fa crollare i prezzi e le aziende devono vendere in perdita, 2026, <https://www.ilsole24ore.com/art/coldiretti-l-olio-tunisia-fa-crollare-prezzi-e-aziende-devono-vendere-perdita-AI5REnJB> accessed on 02/03/2026

⁷³ Financial Times, Tunisian olive oil production to overtake Italy's after bumper harvests, 2026, <https://www.ft.com/content/bfb0136a-04ab-4b3a-92a3-090cc7557128> accessed on 02/03/2026

^{74,75,76,77,78,79} Istat, Nomenclatura combinata (NC8) (quantità e valore) dati annuali e mensili, 2026, https://esploradati.istat.it/coeweb/databrowser/#/it/coe/categories/NC8/IT1,DF_DCSE_NC8_A_M_CONJ_2,1.0 accessed on 02/03/2026

⁸⁰ Assica, Rapporto annuale 2024, 2024, https://www.assica.it/wp-content/uploads/2025/06/Assica_Abstract-2024-web-singole-1.pdf accessed on 07/10/2025

⁸¹ Coldiretti Bio, cited by Il Sole 24 Ore, Biologico, le vendite in Italia raggiungono quota 6,9 miliardi (+6,2%), 2026, <https://www.ilsole24ore.com/art/biologico-vendite-italia-raggiungono-quota-69-miliardi-62percento-AIfMKiaB> accessed on 03/03/2026

^{82,83,84} Osservatorio Sana 2025, cited by Il Sole 24 Ore, Biologico, le vendite in Italia raggiungono quota 6,9 miliardi (+6,2%), 2026, <https://www.ilsole24ore.com/art/biologico-vendite-italia-raggiungono-quota-69-miliardi-62percento-AIfMKiaB> accessed on 03/03/2026



Credits: Getty Images

History, evolution and culture

On our tables for millennia, yet always different

No cuisine in the world carries its history quite like Italian cuisine: centuries of layers, influences and local roots that stand the test of globalisation. More than just a product, Italian food is a cultural heritage: an ongoing narrative that preserves the past and looks to the future. Since 2022, the Comitato per il 'Made in Italy' nel Mondo (CIMIM) has been spearheading the Government's efforts to strengthen **the protection and promotion of Italian excellence**⁸⁵. Furthermore, certified supply chains feature prominently in numerous international promotional campaigns.

A historic milestone for 'Made in Italy'

On 10 December 2025, **UNESCO inscribed Italian cuisine in its entirety on the Representative List of the Intangible Cultural Heritage of Humanity**⁸⁶. This is an unprecedented decision: it is the first time that an entire national cuisine has received this recognition, not merely as

a collection of recipes, but as a **shared cultural model** encompassing the conscious selection of raw ingredients, the transmission of knowledge and respect for local territories. This was not the first time UNESCO had recognised Italy's agrifood heritage. In previous years, the **Mediterranean diet** (2013), the **'alberello' vine-training technique of Pantelleria** (2014), the **art of the Neapolitan pizza maker** (2017), **truffle hunting and harvesting** (2021), the **breeding of the Lipizzaner horse** (2022), **traditional gravity irrigation** (2023) and the practice of **transhumance** (2023)⁸⁷. The 2025 decision is of a different magnitude. Among the most tangible benefits, this recognition **strengthens national cultural identity** and enhances the perception of Italian products abroad, providing new arguments in the fight against 'Italian Sounding'. However, even more significant are the values that UNESCO has placed at the heart of its rationale: **sustainable development, social cohesion, biocultural diversity, and intergenerational transmission**. Italian cuisine is

recognised as a living practice, rooted in the local area and open to the future: a system that provides answers to the major contemporary questions of sustainability, quality of life and the preservation of biodiversity. Italian cuisine is not a vestige of a dead past, but a model that continues to speak to the present. It is no coincidence that, less than two weeks after UNESCO's decision, the UN General Assembly established the **International Day of the Mediterranean Diet**, which will be celebrated annually on 16 November⁸⁸. This recognition comes on top of that from other major international organisations: the FAO had already announced in November 2024 the SABIR Observatory, a platform created to gather knowledge and best practices on the Mediterranean diet, drawing on scientific evidence, operational materials and educational resources⁸⁹. The WHO, for its part, has for years included the Mediterranean diet among the benchmark dietary patterns for the prevention of non-communicable diseases, recognising its value also in terms of public health⁹⁰.

Tradition and innovation

Italian gastronomic culture is, first and foremost, an expression of its history — a collective narrative that **spans the centuries** and is reflected in the landscape. Italy has built its development model

around a concept of quality that blends **artisanal expertise with industrial innovation**, bringing to the world products in which every flavour encapsulates a story, rooted in ancient traditions and heritage. The **ancient Romans**, for example, not only codified dietary practices that still resonate today, but also attributed **symbolic and social value to food**. The convivium was much more than a meal; it was a social ritual that established hierarchies, celebrated solemn occasions and forged political relationships. Even then, **wine was regarded as a cultural asset**, with regional varieties and winemaking techniques that foreshadowed today's oenological diversity. In the imperial era, **olive oil, bread and wine** were already considered the three **pillars of the Mediterranean diet**.

⁸⁵ Ministero delle Imprese e del Made in Italy, CIMIM: prima riunione oggi del Comitato per il Made in Italy nel mondo, 2023, <https://www.mimit.gov.it/it/notizie-stampa/cimim-prima-riunione-oggi-del-comitato-per-il-made-in-italy-nel-mondo> accessed on 07/10/2025

⁸⁶ UNESCO, Decision of the Intergovernmental Committee: 20.COM 7.B.27, 2025, <https://ich.unesco.org/en/decisions/20.COM/7.B.27> accessed on 04/03/2026

⁸⁷ UNESCO, Patrimonio Culturale Immateriale, 2016, <https://www.unesco.it/it/iniziative-dellunesco/patrimonio-culturale-immateriale/> accessed on 04/03/2026

⁸⁸ FAO, La FAO plaude alla risoluzione delle Nazioni Unite per istituire la Giornata Internazionale della Dieta Mediterranea, 2025, <https://www.fao.org/newsroom/detail/fao-welcomes-un-s-decision-to-establish-an-international-day-for-the-mediterranean-diet> accessed on 04/03/2026

⁸⁹ FAO, Welcome to Sabir: the observatory on the Mediterranean diet, 2024, <https://openknowledge.fao.org/items/df7ff7bc-304c-4b4d-9b50-cf46f3745919> accessed on 04/03/2026

⁹⁰ UNESCO, Dieta Mediterranea, 2024, <https://www.unesco.it/it/iniziative-dellunesco/patrimonio-culturale-immateriale/dieta-mediterranea/> accessed on 04/03/2026

Over the centuries, **each region has developed its own culinary identity**, shaped by microclimates, biodiversity and historical influences. From the 'peasant' cuisine of the southern countryside, based on pulses, bread and olive oil, to the more elaborate dishes of the North, where butter, rice and cheese take centre stage. The Italian culinary landscape is **a map of differences that translate into identity**, a mosaic of flavours and practices, where **food biodiversity** mirrors natural biodiversity. Every province boasts a wealth of traditional dishes, unique ingredients and time-honoured recipes; one need only consider the difference between a Neapolitan and a Bolognese ragù, or between Neapolitan and Roman pizza. The richness of Italian agrifood production, which does not standardise but rather celebrates differences⁹¹, is also evidenced by Italy's leading position in Europe in terms of the number of **quality certifications: 897 PDO, PGI and TSG products**, comprising **331 foodstuffs, 530 wines and 36 spirits**⁹². As of March 2026, the **PDO economy** is worth **€20.84 billion**: 9.64 billion for food products, 11.04 billion for wines and 151 million for the spirits sector⁹³. Every region, in both form and label, is a showcase for this diversity: such as the Prosecco hills in Veneto, where the temperature variation between day and night helps to develop elegant aromas; or the Murgia region near Bari —a land of ancient wheat varieties— where slow wind-drying gives the pasta a unique organoleptic pro-

file; from Ligurian olive cultivation on steep slopes to Sicilian citrus farming bathed in Mediterranean sunshine. **What we eat in Italy tells the story of the land itself**, and the absence of a single 'national cuisine' has, paradoxically, reinforced the perception of richness and variety. Regional diversity is now seen as an asset. The promotion of this heritage lies at the heart of the work of cultural movements —led by **Slow Food** since 1986— which have placed **the defence of biodiversity and the cultural dignity of 'good, clean and fair' food** at the centre of the global debate. In this sense, small shops, dairies, oil mills and bakeries are bastions of memory. In a world dominated by standardisation, Italy therefore offers an alternative model: one of diversity as a value, of quality as a narrative, and of production as a cultural act. When *terroir*-based excellence meets the experimentation of start-ups, innovation is not a break with tradition but a conscious continuation. **New technologies amplify, protect and make local specialties recognisable on global markets.**

⁹¹ Fondazione Symbola, Coesione è competizione, 2023, <https://symbola.net/ricerca/coesione-e-competizione-2023/> accessed on 07/10/2025

^{92,93} Fondazione QualiVita, Osservatorio Italia, 2026, <https://www.qualivita.it/osservatorio/osservatorio-ita/> accessed on 03/03/2026

Excellence and innovation

A global laboratory for new food

Italy is establishing itself as **a fertile laboratory for agrifood innovation**, thanks to an active and synergistic network of universities, research centres, businesses and public institutions. The national patent ecosystem, underpinned by strong safeguards for intellectual property rights, lies at the heart of this growth, making solutions developed within the country scalable and protectable on a global scale. One emerging area is that of plant-based foods, where there were already **over 500 patents** by early 2025: innovations involving pulses, seaweed, mushrooms and even cultured meat⁹⁴. CREA, the Consiglio per la Ricerca in agricoltura e l'analisi dell'Economia Agraria, with its public funding, has filed 30 industrial patents, 12 trademarks, and registered 809 plant varieties in the official registers, including various types of wheat, vegetables and fruit⁹⁵. Alongside traditional agrifood technologies, **new areas of innovation** are emerging:

- **Organic and biotech** (new plant varieties and diagnostic kits)⁹⁶
- **Sustainable and digital packaging** (edible smart

labels, single-material packaging, NFC)⁹⁷

- **Advanced food technologies** (active packaging, sensors, shelf-life extension)⁹⁸
- **Circular economy** (recycling of agri-food and agricultural waste)⁹⁹

The **dairy supply chain** is also being reimaged through IoT sensors and artificial intelligence, which enable real-time monitoring of animal welfare and milk quality, **reducing environmental impact** and promoting highly traceable production¹⁰⁰.

⁹⁴ Il Sole 24 Ore, Alimenti vegetali, già 500 brevetti. Cresce l'alleanza ricerca-industria, 27 Febbraio 2025, <https://www.ilsole24ore.com/art/alimenti-vegetali-gia-500-brevetti-cresce-l-alleanza-ricerca-industria-AGEC9m4C> accessed on 03/03/2026

⁹⁵ CREA, Innovazioni, <https://innovazioni.crea.gov.it/index.php?fc=1> accessed on 08/10/2025

⁹⁶ CREA, Privative vegetali, <https://innovazioni.crea.gov.it/privative-vegetali.php> accessed on 08/10/2025

⁹⁷ Comieco, Innovazione – Eco-design e packaging sostenibile, <https://www.comieco.org/innovazione/> accessed on 08/10/2025

⁹⁸ CREA, Ingegneria e trasformazioni agroalimentari, <https://www.crea.gov.it/web/ingegneria-e-trasformazioni-agroalimentari> accessed on 08/10/2025

⁹⁹ Circular Economy Network, 7° Rapporto sull'economia circolare in Italia – 2025, 2024, <https://circulareconomy.network.it/wp-content/uploads/2025/05/Rapporto-sulleconomia-circolare-in-Italia-2025.pdf> accessed on 08/10/2025

¹⁰⁰ xFarm Technologies, Il Gruppo Granlatte Granarolo e xFarm Technologies uniti per una filiera del latte più efficiente, sostenibile e attenta al benessere animale, 26 ottobre 2023, <https://xfarm.ag/blog-posts/il-gruppo-granlatte-granarolo-e-xfarm-technologies-uniti-per-una-filiera-del-latte-piu-efficiente-sostenibile-e-attenta-al-benessere-animale> accessed on 08/10/2025

Technological developments are also driving **transparency and traceability throughout the supply chain**. Thanks to tools such as **blockchain** and **data-sharing platforms**, it is now possible to track every stage of production—from raw materials to distribution—ensuring the authenticity of information on origin, sustainability and quality, and building greater trust between businesses and consumers¹⁰¹.

In the field of **the circular bioeconomy**, the Department of Food Science at the Università di Parma patented a **natural antimicrobial extract** derived from fruit and vegetable by-products in 2019¹⁰². This innovation, supported by the university's

patent office, is designed to **extend the shelf life of food in an environmentally friendly way**. The Università di Parma also plays a key role through **Centro Interdipartimentale per il Packaging (CIPACK)**, which coordinates applied research into **food packaging materials and processes** and facilitates **technology transfer** to local businesses, through projects dedicated to sustainable solutions and industrial validation tests¹⁰³.

The **Consiglio Nazionale delle Ricerche (CNR)** also contributes with **high-tech solutions**. The CNR's Department of Bio-Agri-Food Sciences operates across the entire food supply chain: from the

sustainable management of agriculture and forests to biotechnology research, right through to food safety¹⁰⁴. It holds **43 intellectual property rights**, including 22 patents, 10 new plant varieties and 9 registered trademarks, reflecting research activities strongly focused on innovation and the commercialisation of scientific research¹⁰⁵. The **Italy's Politecnici**—Milan, Turin and Bari—are expanding the scope of agrifood innovation through **an engineering-based, cross-disciplinary approach, starting with dedicated degree programmes**. In **Milan**, the focus is on **food processing, safety and the sustainability** of the entire supply chain¹⁰⁶.

Turin is focusing on **advanced technologies** for agriculture and the food sector¹⁰⁷, whilst **Bari** is developing initiatives that combine **research, digitalisation and regional growth**¹⁰⁸. To round off the ecosystem, the **Agenzia Nazionale per le nuove tecnologie, l'energia e lo sviluppo economico sostenibile (ENEA)** leads **open innovation projects for the agrifood industry**. In particular, the **Brindisi** operational unit develops solutions for the **valorisation of agrifood waste**, using technologies that enable the recovery of biomolecules from industrial wastewater, the production of bioplastics and 100% compostable materials, and the design of sustainable packaging¹⁰⁹. ENEA has also established the **CSAgri network of research laboratories**, which offers **advanced services** for innovative pro-

cesses, the recycling of by-products, and sustainable packaging and labelling¹¹⁰. This extensive network of public and private stakeholders makes Italy a concrete platform for the development and licensing of high-impact agrifood technologies. Here, innovation is not just a goal, but a way of cultivating the future.

An excellent
processing
industry
makes Italian
food the most
loved in the
world



ROBOTICS

Increasingly autonomous machines for sowing, harvesting and targeted treatments: efficiency and sustainability in the fields.

TRACEABILITY

Blockchain, QR codes and sensors to guarantee origin, quality and safety throughout the supply chain.

PACKAGING

Compostable, intelligent and sustainable materials to protect the product and communicate its value.

AI IN AGRICULTURE

Artificial intelligence to predict yields, monitor crops and optimise resources.

PRECISION AGRICULTURE

GPS technology, drones and data analytics to reduce waste and increase productivity.

¹⁰¹ Trusty S.r.l., L'Ecosistema: come lo abbiamo costruito, <https://www.trusty.id/en/how-we-built-it> accessed on 08/10/2025

¹⁰² Università degli Studi di Parma, Dagli scarti vegetali un estratto antibatterico per aumentare la vita degli alimenti, 2019, <https://www.unipr.it/notizie/dagli-scarti-vegetali-un-estratto-antibatterico-aumentare-la-vita-degli-alimenti> accessed on 08/10/2025

¹⁰³ InfoPackaging, CIPAK – Centro di Ricerca Interdipartimentale per il Packaging, <https://www.infopackaging.it/aziende/lista/cipack> accessed on 08/10/2025

¹⁰⁴ CNR DISBA, Aree strategiche – DISBA, <https://www.disba.cnr.it/aree-strategiche/> accessed on 08/10/2025

¹⁰⁵ CNR DISBA, Chi siamo – Dipartimento Scienze Bio-Agroalimentari (DISBA), <https://www.disba.cnr.it/chi-siamo/> accessed on 08/10/2025

¹⁰⁶ Politecnico di Milano, Food Engineering (Master's degree programme), <https://www.polimi.it/en/education/laurea-magistrale-programmes/programme-detail/food-engineering> accessed on 08/10/2025

¹⁰⁷ Politecnico di Torino, Agritech Engineering (Master's degree programme), <https://www.polito.it/en/education/master-s-degree-programmes/agritech-engineering> accessed on 08/10/2025

¹⁰⁸ Agritech Center, website, <https://agritechcenter.it/> accessed on 08/10/2025

¹⁰⁹ Enea, Operative Unit ENEA C.R. Brindisi, <https://www.collezione-microbica.enea.it/en/sus-mirri/operative-unit-enea-c-r-brindisi.html> accessed on 08/10/2025

¹¹⁰ Enea CSAgri, Agri-Food Industry, –, <https://csagri.enea.it/en/agri-food-industry> accessed on 08/10/2025

Machinery and technologies Food processing sets the standard in Italy

To guarantee the quality of its food products and the development of the industry, the entire sector has made **huge investments to support innovation and development** —in both products and packaging, as well as in logistics and the robustness of supply chains.

A leading technology hub for food processing

In 2026, the global **food packaging** market was **worth 400 billion dollars**¹¹¹. With an estimated annual growth rate of 5.18%, the sector's value could exceed **515 billion dollars by 2031**¹¹². This growth is driven by increasing urbanisation, stricter recycling regulations in Europe and North America, and greater investment in preservation technologies, whilst e-commerce and industrial consolidation are redefining the market's structure and channels¹¹³. Against this backdrop, Italy remains a **global technology hub for food pro-**

cessing and packaging, with a unique ability to adapt to local production needs, ranging from artisanal SMEs to large multinational plants. **The Italian automatic packaging machinery industry** reached **€10.2 billion** in 2025, a slight increase of **2.1%** compared to the €10 billion on 2024¹¹⁴. The sector has a strong **export**, totalling **€8.1 billion**, a slight increase of **1.5%** year on year¹¹⁵. According to the latest available figures for 2024, the sector consists of **over 619 companies** and **40,503 employees**, an increase of 6% compared with 2023¹¹⁶. **Most of the production is destined for the Food & Beverage sector**, which accounts for 56.1% of total turnover¹¹⁷: the food sector accounts for 31.0%, whilst beverages account for 25.1%¹¹⁸. Italy's leadership is based on four pillars: technological quality, a high degree of customisation, global after-sales service and structural competitiveness, thanks to the virtuous coexistence of large groups and specialised SMEs. Over 80% of companies in the sector are located in Emilia-Romagna, Lombardy, Piedmont and Veneto¹¹⁹. **The so-called 'Packag-**

ing Valley' stretches between Bologna and Reggio Emilia: this industrial district boasts the highest concentration of companies in the sector in Europe, 57% of which manufacture food and beverage packaging machinery¹²⁰.

The unseen heart of Italian agrifood excellence

But Italian excellence is not limited to packaging. The country is **also a leader in the food production and processing machinery sector**, with technologies ranging from the pasteurisation of dairy products to the shaping of plant-based products, from dosing robotics to digital traceability. According to the latest comparative analysis available, covering 2022, Italy is the **world's second-largest exporter of machinery and technologies for the food and drink industry** accounting for 18% of global exports, a figure that rises to 28% within the European market¹²¹. Behind every successful Italian agrifood product lie automated production lines, smart packaging systems, traceability solutions and robotics that guarantee efficiency, safety, quality and sustainability. Italian companies offer turnkey solutions, integrating plant, software and predictive maintenance services, with a technological offering that delivers high added value.

The variety and flexibility of Italian solutions are reflected in **their ability to serve vertical market segments**: from filling and capping systems for wine, to machinery for tomato processing, right through to production lines for fresh and frozen products. The technologies are designed to ensure **precision, hygiene, speed, energy efficiency and waste reduction** —all key factors in a global market increasingly focused on sustainability.

^{111,112,113} Mordor Intelligence, Dimensioni del mercato degli imballaggi alimentari e analisi delle quote: tendenze e previsioni di crescita (2025-2030), 2026, <https://www.mordorintelligence.it/industry-reports/food-packaging-market> accessed on 03/03/2026

^{114,115} Ucima, Ucima presenta i preconsuntivi 2025: andamento, 2025, <https://www.ucima.it/servizio/analisi-centro-studi-mecs/notizia/4921/ucima-presenta-i-preconsuntivi-2025-andamento/> accessed on 03/03/2026

^{116,117,118} Ucima, Dati Ucima 2024. Costruttori di macchine per il packaging, 2025, https://www.ucima.it/public/files/Cs_Ucima_dati_2024.pdf accessed on 08/10/2025

^{119,120} Mecs - Centro studi dell'Unione costruttori italiani macchine automatiche per il confezionamento e l'imballaggio cited by Forbes Italia in Alla scoperta della Packaging Valley, il distretto emiliano degli imballaggi che fattura 9 miliardi di euro l'anno, 2024, <https://forbes.it/2024/07/29/scoperta-distretto-imballaggi-9-miliardi-anno> accessed on 08/10/2025

¹²¹ Nomisma, Il machinery italiano per il food & beverage: dimensioni, tendenze e opportunità (Osservatorio Nomisma), 2022, <https://www.nomisma.it/focus/il-machinery-italiano-per-il-foodbeverage-dimensioni-tendenze-e-opportunita-nellosservatorio-nomisma/> accessed on 08/10/2025

Regional impact Biodiversity and respect for nature: the foundation of success

Italy boasts unrivalled **environmental diversity**: from the Alps to Sicily, each geographical area possesses specific climatic, geological and agricultural conditions that give rise to unique products. Over the centuries, Italy has been home to various peoples, who have **enriched the nation's agrifood tradition**. It is not just geography, therefore, but history too that makes the difference. The Italian agrifood sector is strongly 'territorially rooted', with **certified quality production concentrated in areas corresponding to historic rural districts**, such as the Parma region, the Langhe, the Val di Non, Irpinia or the Tavoliere in Apulia. These areas not only provide the raw materials but are also the custodians of production know-how handed down through generations. Italian quality lies not only in the organoleptic qualities of the product, but also in its deep-rooted identity and its link to its geographical origin. Farming traditions, technical expertise and attention to sea-

sonality are elements that transform every product into an ambassador for the territory from which it comes.

PDO, PGI and TSG: recognised and protected quality

The European system of **Geographical Indications (GI)** serves to certify and promote this link between the product and its territory; it provides a **guarantee for the consumer** and **acts as a strategic tool for protecting producers**. **Protected Designation of Origin (PDO)** products are those "whose production, processing and preparation take place within a **defined geographical area using a recognised and historically established method**". The **Protected Geographical Indication (PGI)** label, on the other hand, requires that at least one **stage of the production process takes place within the spec-**

ified territory. In addition to these, the **Traditional Speciality Guaranteed (TSG)** designation protects **traditional techniques** and **recipes**, regardless of the geographical area of production, thereby contributing to the preservation of Europe's culinary heritage. Italy is the undisputed leader in Europe in terms of the number of certified agrifood products, with **897 food and alcoholic drinks bearing the PDO, PGI or TSG labels**¹²². This record reflects the diversity of traditional produce, ranging from Campania PDO buffalo mozzarella to Modena PGI balsamic vinegar, including Emilia-Romagna PGI pears and Parma PDO ham. Geographical Indications represent an **advanced model of integrated territorial development**, with agrifood quality, cultural identity, business and tourism all contributing to the creation of shared value. This value is not static, but circular and generative, as it produces spillover effects across a long supply chain that trigger lasting and sustainable processes within the local areas.

The figures for the PDO Economy

The **Italian PDO economy** remains in good health: as of March 2026, the total **production value** of certified products stood at **€20.84 billion**, of which **9.64 billion** was for **food**, **11.04 billion** for **wines**

and approximately **151 million** for **GI spirits**¹²³. More detailed data, compiled in the latest edition of the Ismea-Qualivita Report, relate to 2024: exports of certified products exceeded the €12 billion mark for the first time, reaching **€12.3 billion**, representing an increase of **8.2%** on 2023 and **24.3%** on 2020¹²⁴. Almost all of **the five main export markets** recorded double-digit growth: the United States (12.3% increase year over year), Germany (10.9%), the United Kingdom (2.6%), France (9.1%) and Canada (12.9%)¹²⁵. At the start of 2024, the Italian PDO Economy consists of **328 protection consortia** authorised by the Ministero dell'Agricoltura, della Sovranità Alimentare e delle Foreste and **183,823 businesses**, of which 97,236 were in the wine sector, 86,346 in the agrifood sector and 241 in the spirits sector. Of these, 175,358 operate in the production chain and 31,724 in processing. The total number of **employees** is **864,441**: 597,250 in the food sector, 330,587 in the wine sector and 7,346 in the spirits sector —divided between producers

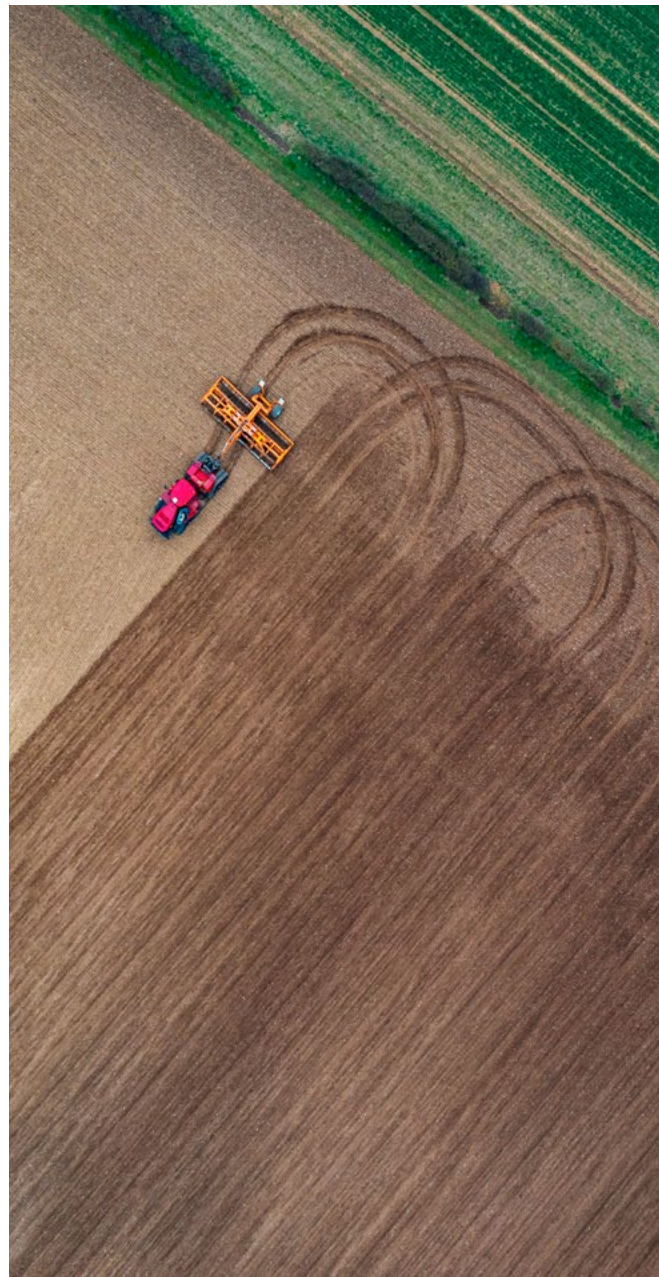
^{122, 123} Fondazione QualiVita, Osservatorio Italia, 2026, <https://www.qualivita.it/osservatorio/osservatorio-ita/> accessed on 02/03/2026

^{124, 125, 126, 127} Fondazione Qualivita, Rapporto Ismea-Qualivita 2025, 2025, <https://www.qualivita.it/publicazioni/rapporto-isme-a-qualivita-2025/> accessed on 03/03/2026

(516,639) and processors (347,802)¹²⁷. At a regional level, the PDO Economy is growing in 14 out of 20 regions, with positive performance in the North-West (up 7.1%), the North-East (up 2.8%) and the South and the Islands (up 3.4%), whilst growth in Central Italy has slowed for the second consecutive year (down 0.9%)¹²⁸. Out of 107 Italian provinces, 70 recorded a PDO Economy value higher than in 2023, and more than one in four (26%) recorded double-digit growth¹²⁹.

The challenges ahead

Recent European reforms, in particular Regulation (EU) 2024/1143¹³⁰, have strengthened the role of protection consortia, providing for greater powers of control, transparency and oversight to ensure the traceability of production and protect the rights of genuine producers. One of the challenges for the future is to combine quality and innovation. Technologies such as food blockchain, smart labelling systems and dynamic QR codes enable consumers to trace a product's journey from field to table. This strengthens confidence in PDO and PGI products, meeting the growing demand for transparency and sustainability. As also emphasised by the FAO, GIs are an effective tool for promoting sustainable rural development, enhancing the environment, local employment and cultural distinctiveness¹³¹.



Credits: Getty Images

^{128,129} Fondazione Qualivita, Rapporto Ismea-Qualivita 2025, 2025, <https://www.qualivita.it/pubblicazioni/rapporto-ismea-qualivita-2025/> accessed on 03/03/2026

¹³⁰ Fondazione Qualivita, Dal nuovo regolamento UE: maggiori poteri e responsabilità per i consorzi di tutela, <https://www.qualivita.it/news/dal-nuovo-regolamento-ue-maggiori-poteri-e-responsabilita-per-i-consorzi-di-tutela/> accessed on 08/10/2025

¹³¹ FAO, Strengthening sustainable food systems through geographical indications, 2018, <https://openknowledge.fao.org/server/api/core/bitstreams/afc44660-75ac-43b4-918e-ef4915c0ff52/content> accessed on 08/10/2025

Districts and the stories of their territories

From north to south, every place tells a food story

One of the most interesting aspects of 'Made in Italy' is the district-based nature¹³² of production —that is, the collective and geographically localised dimension through which product excellence has developed over the years. Districts are highly specialised territories where businesses, knowledge, culture and infrastructure are concentrated around specific supply chains: a unique combination of know-how, regional identity and entrepreneurial density. Italian Law 205/2017 established the 'food districts'¹³³ —bringing together under a single definition rural districts, quality agrifood districts, bio-districts and agro-industrial supply chain districts—with the aim of promoting development and territorial cohesion, safeguarding the landscape and identifying models of innovation involving all stakeholders in the supply chain and the local area. The official register of the Ministero dell'Agricoltura, della Sovranità Alimentare e delle Foreste, updated in November 2025, lists 227 recognised Food Districts¹³⁴.

In September 2025, exports from Italy's agrifood districts reached €22.03 billion, representing year-on-year growth of 4.1%¹³⁵. In 2024, the total value had reached €28.8 billion¹³⁶. The olive oil sector experienced a setback, with a year-on-year decline of 21.7% in the first nine months of 2025, largely a natural correction following the exceptional result of 2024 (up 42%)¹³⁷. There were also slight declines in the wine sector (down 0.6%) and in the canned food sector (down 1.5%)¹³⁸. By contrast, the pasta and confectionery sector showed very positive growth (up 6.5%), as did coffee (up 16.9%), dairy products (up 15.2%), agricultural products (up 12.2%) and meat and cured meats (up 10.1%)¹³⁹.

¹³² Treccani, Made in Italy (Dizionario di Economia e Finanza), https://www.treccani.it/enciclopedia/made-in-italy_%28Dizionario-di-Economia-e-Finanza%29/ accessed on 08/10/2025

¹³³ CREA, La Rete Rurale per il cibo italiano: i Distretti, <https://crea-afuturo.crea.gov.it/10664/> accessed on 08/10/2025

¹³⁴ Ministero delle Politiche Agricole Alimentari e Forestali (MASAF), Registro nazionale dei Distretti del Cibo, 2025, <https://www.masaf.gov.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/14160> accessed on 03/03/2026

^{135,136,137,138,139} Intesa Sanpaolo, Monitor dei distretti agroalimentari gennaio 2026, 2026, <https://group.intesasnapaolo.com/it/research/monitor-dei-distretti-agroalimentari> accessed on 03/03/2026

Among the region's numerous districts, we analyse in detail the performance of the top four by export value in the first nine months of 2025: **Parma's food sector, Alba and Cuneo's confectionery, the wines of Langhe, Roero and Monferrato, and Nocera's preserves.**

Parma: excellence and beauty

The beating heart of Italy's so-called 'Food Valley', the province of **Parma** is home to one of Europe's most comprehensive and advanced agrifood supply chains, where tradition and innovation intertwine within an integrated and dynamic industrial ecosystem. Within the district, every link in the supply chain is managed by leading players: from raw materials to the finished product, right through to logistics and global distribution. A perfectly integrated production model where, alongside historic consortia such as those for **Parmigiano Reggiano PDO and Prosciutto di Parma PDO**, multinational food companies, agricultural cooperatives, small artisan businesses and research centres all operate side by side. The figures speak for themselves: the Parma district brings together over a thousand businesses and around 15,000 employees¹⁴⁰, representing the main hub of the Italian food industry. The first nine months of 2025 show very varied trends across its different production specialisations. The **food sector**

(pasta, confectionery and preserves), with **exports worth €1.3 billion**¹⁴¹, remained largely stable (0.2% increase year-on-year), thanks to growth in Switzerland (up 10.5%), the Netherlands (up 40.2%) and Turkey (up 49.5%), whilst the main European markets and the United States struggled (down 13.2%)¹⁴². **Parma cured meats** reached **€436 million** (up 7.1%)¹⁴³, thanks to strong performance in France (up 10.6%), Canada (up 25.3%), Spain (up 43.3%) and Poland (up 76.9%)¹⁴⁴. The **Parma dairy** sector is the most dynamic, with **€402 million** and a year-on-year increase of **17.3%**¹⁴⁵, driven by the United States (up 59%), Germany (up 10.3%) and Saudi Arabia (up 83.8%)¹⁴⁶. The province is a strategic hub for those seeking certified quality, reliable production and advanced logistics capabilities. But Parma is also synonymous with beauty and hospitality. As Italy's Capital of Culture in 2020 and a member of UNESCO's Creative Cities Network, the city has built a unique tourist offering centred on its gastronomic identity. The **Food Museum**, itineraries dedicated to local specialities, **guided tours of prosciutto and cheese dairies**, and events such as **Cibus** and the **Parma Food Valley Festival** make the district a leading example of integration between **production and the promotion of the local area**, connected to global markets yet deeply rooted in its history and territory. For international buyers, this represents an opportunity to access premium products, backed by trace-

ability, a strong reputation and consistent performance over time.

The Langhe: landscapes of flavour

In the heart of Piedmont, amongst the rolling hills of the Langhe, Roero and Monferrato, lie some of the agrifood districts most representative of Italian excellence—the cradle of great **wines, truffles and legendary desserts**. Historic wineries stand alongside modern businesses and protection consortia to create iconic labels such as Barolo, Barbaresco and Dolcetto, exported all over the world. The wine sector coexists with the major confectionery industry and a network of small artisanal businesses that process the Tonda Gentile delle Langhe PGI hazelnut.

The Langhe, Roero and Monferrato wine sector remains the main hub of the Italian wine industry in terms of export value, with **€1.45 billion** in the first nine months of 2025¹⁴⁷. Having closed 2024 with €1.93 billion, the January–September 2025 period showed **substantial stability (0.1%)**, with gradual recoveries in the second and third quarters (up 4.3% and up 3.7% respectively) and resilience exceeding the average for the wine sector (down 0.6%)¹⁴⁸. The district is facing headwinds in the US market, which accounts for 19% of its total exports, where a **5.2% decline**

was recorded over the nine-month period, compounded by declines in France, the UK and Germany¹⁴⁹. In the first nine months of 2025, the **Alba and Cuneo Confectionery District** recorded exports of **€1.84 billion**, with the highest year-on-year growth of **13.3%** among Italian districts following an exceptional 2024 in which exports totalled 2.37 billion¹⁵⁰. This performance is significantly **higher than the average for the pasta and confectionery sector (up 6.5%)**, driven by record results in **Poland (up 63%), Russia (up 270%)** and **Belgium (up 44%)**, which offset declines in the United Kingdom, Hong Kong and the United States¹⁵¹. In the US market, which accounts for 6% of the district's total, sales fell by 8.5%¹⁵². What makes these regions unique is their ability to attract high-value international tourism. The **Langhe, a UNESCO World Heritage Site**¹⁵³, boast a network of relais, agritourism establishments and Michelin-starred restaurants offering immersive experiences amongst wineries, truffle grounds and vineyards in the hills.

¹⁴⁰ Il Sole 24 Ore, Parma Food Valley: eccellenze alimentari da oltre 11 miliardi di fatturato, 2025, <https://www.ilsole24ore.com/art/parma-food-valley-eccellenze-alimentari-oltre-11-miliardi-fatturato-AGChCmID> accessed on 14/04/2026

^{141/143/145} Intesa Sanpaolo, Monitor dei distretti agroalimentari gennaio 2026, 2026, <https://group.intesaspaolo.com/it/research/monitor-dei-distretti-agroalimentari> accessed on 03/03/2026

^{142/144/146} Intesa Sanpaolo, Monitor dei distretti dell'Emilia-Romagna febbraio 2026, 2026, <https://group.intesaspaolo.com/it/research/monitor-regionale-dei-distretti> accessed on 03/03/2026

^{147,148,149,150,151,152} Intesa Sanpaolo, Monitor dei distretti agroalimentari gennaio 2026, 2026, <https://group.intesaspaolo.com/it/research/monitor-dei-distretti-agroalimentari> accessed on 03/03/2026

¹⁵³ UNESCO, Vineyard Landscape of Piedmont: Langhe-Roero and Monferrato, 2014 <https://whc.unesco.org/en/list/1390> accessed on 03/03/2026

The annual International White Truffle Fair of Alba attracts enthusiasts, chefs and investors from all over the world, transforming the region into a global hub of gastronomy. Efficient logistics infrastructure and a business culture open to innovation make these districts ideal partners for international investors seeking reliability and authenticity, enabling them to bring to the world not just a product, but an entire landscape of flavour.

Nocera: the South that preserves the future

In the heart of Campania, the **Nocera and Gragnano agrifood district** is one of the most significant agro-industrial hubs in Southern Italy, which in 2019 was home to over **30,000 businesses**¹⁵⁴. The district is renowned for **processing tomatoes** into peeled tomatoes, tomato purée and tomato paste, which are exported worldwide, as well as for the **production of pasta**, with PGI brands such as Pasta di Gragnano, and for **dairy processing**.

In 2024, the **Nocera preserves district** achieved exports worth €1.53 billion¹⁵⁵. In the first nine months of 2025, exports fell by 9.2%, reaching just under **1.03 billion**, held back by declines in Austria (down 14.9%), the Netherlands (down 16.3%) and the United States (down 2.2%), in stark contrast to the strong growth seen in other parts of the supply chain¹⁵⁶. The third quarter of

2025, however, showed a moderation in the decline (down 5.0%)¹⁵⁷. The **San Marzano PDO tomato** is the undisputed star of the sector, a symbol of quality and traceability. Companies in the district are investing in processing technologies and sustainable packaging, contributing to the competitiveness of 'Made in Italy'. The **Neapolitan food** sector, specialising in pasta and confectionery, having closed 2024 with marginal growth of 0.5% (**€898 million**)¹⁵⁸, recorded a **decline of 2.7%** in the first nine months of 2025, with exports worth €639 million¹⁵⁹. Excellent results were achieved in the US market, where exports of Neapolitan pasta and confectionery rose by 54.1% over the same period¹⁶⁰.

The agrifood sector in Nocera and Gragnano is also a driving force for regional cohesion, with significant employment and social benefits for the provinces of Salerno and Naples. Its ability to combine tradition and innovation makes it a case study for development policies in Southern Italy¹⁶¹.

¹⁵⁴ Regione Campania, L'industria alimentare in Campania: main data, traiettorie strategiche e opportunità, 2019, https://www.sviluppo-campania.it/wp-content/uploads/2022/02/Value_proposition_Agroalimentare_ita.pdf accessed on 08/10/2025

^{155,156,157,158,159,160} Intesa Sanpaolo, Monitor dei distretti agroalimentari gennaio 2026, 2026, <https://group.intesasanpaolo.com/it/research/monitor-dei-distretti-agroalimentari> accessed on 03/03/2026

¹⁶¹ Unioncamere / Programma Infrastrutture, Campania – Analisi economica e mappatura delle opere – Versione finale, 2020, https://www.programmainfrastrutture.unioncamere.it/sites/default/files/reportistica/CAMPANIA%20-%20Analisi%20economica%20e%20mappatura%20delle%20opere%20-%20Versione%20finale_0.pdf accessed on 08/10/2025



Industries

Traceability as a guarantee of quality

In a global context marked by realignments in trade policies and growing protectionist pressures, the Italian agrifood sector continues to demonstrate a **remarkable capacity for adaptation**, with exports growing by 5.5% in the first eight months of 2025¹⁶², a result that reflects the ability of Italian industries to offer **traceable, certified and competitive products**, which are increasingly appreciated globally. This resilience is underpinned by a **strong propensity to invest** according to the most recent data available, in 2024 gross fixed **capital** formation in agriculture reached **€10.6 billion (0.6% increase year on year)**¹⁶³, with ten-year growth of 43.9%, compared with the 10.2% growth recorded in the EU over the same period¹⁶⁴. According to an Ismea survey (December 2024), **35% of farmers plan to invest in 2025**¹⁶⁵, with a preference for machinery and equipment (35%), agricultural buildings and renewable energy installations (22%) and new crops (16%)¹⁶⁶. This is followed by the replacement or installation of irrigation systems (11%) and the refurbishment of buildings (9%), whilst the propensity to invest in precision farming

technologies and intangible assets such as software remains marginal, at less than 1%¹⁶⁷. At the start of 2026, **54.6% of agricultural producers are concentrated in Southern Italy and the Islands**, indicating significant potential for vertical and horizontal development in strategic areas¹⁶⁸. The production system is organised into **agrifood districts**, which serve as exemplary models of integration between agriculture, processing and services. This model fosters synergy between related sectors: food machinery, logistics, nutraceuticals, packaging and digitalisation. Companies collaborate with research centres to develop advanced solutions based on IoT, AI, robotics and blockchain, transforming the industry into a laboratory for innovation. The integration between **the agrifood sector and technology sectors** is one of the key factors behind the competitiveness of 'Made in Italy': each segment contributes to the quality, traceability and sustainability of the final product. Those who invest in Italian food enter a **stable and interconnected ecosystem**, rooted in local communities and looking towards the future.

Underpinning this model are **certified products**, with Italy leading Europe in the number of PDO and PGI foods¹⁶⁹, combined with a highly technological food industry. The country is the **world's second-largest exporter of food packaging machinery**, with a turnover of **€10.2 billion** in 2025¹⁷⁰, 79% of which was generated by exports¹⁷¹. Packaging is a strategic focal point: Italy is investing in green solutions, smart labelling, dynamic QR codes and anti-counterfeiting systems. The 2023 Roadmap of the Cluster Agrifood Nazionale (CL.A.N.), which brings together public and private stakeholders in the sector, recognises these elements as priorities for strengthening exports and combating 'Italian Sounding'¹⁷². Logistics also plays a key role, thanks to the digitalisation of the supply chain: in 2025, **the Italian Agriculture 4.0 market** returned to **growth (9.0% increase year over year)**, reaching a value of **€2.5 billion**¹⁷³: **42% of farms use at least one smart solution**, with growing investment in connected machinery (up 2%) and in telemetry and control solutions (up 3%)¹⁷⁴. At the same time, the overlap between the **agricultural and health sector** is growing: the Italian nutraceutical sector is based on agricultural supply chains of excellence and functional ingredients, often developed in collaboration with public research bodies such as ENEA¹⁷⁵. This entire system is driven by a shared vision. The **Strategia Nazionale di Specializzazione Intelligente**

(SNSI) sets out long-term investment priorities in consultation with the regions and key stakeholders. The development pathways include **digital agriculture 4.0, innovative technologies for packaging and preservation, traceability and food safety systems, and the nutraceutical sector**. The aim is to develop integrated value chains linking research, innovation and the commercialisation of advanced products and services, whilst promoting the key enabling technologies for future generations¹⁷⁶. **Investing in the Italian food and beverage sector** therefore means gaining access to a **mature, scalable and globally recognised system**.

^{162,163,164,165,166,167} ISMEA Mercati, Rapporto 2025 sull'agroalimentare italiano, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13704> accessed on 04/03/2026

¹⁶⁸ Camera di Commercio delle Marche, Open Data Explorer - Demografia delle Imprese in Italia (Imprese attive, Quote, Settore=A, Sottocategoria=011,012), 31/12/2025, <https://opendata.marche.camcom.it/pivot-table.htm?geo=Italia&ag=pr&tb=hmc> accessed on 04/03/2026

¹⁶⁹ Fondazione QualiVita, Osservatorio Italia, 2026, <https://www.qualivita.it/osservatorio/osservatorio-ita/> accessed on 02/03/2026

^{170,171} Ucima, Ucima presenta i preconsuntivi 2025: andamento, 2025, <https://www.ucima.it/servizio/analisi-centro-studi-mecs/notizia/4921/ucima-presenta-i-preconsuntivi-2025-andamento/> accessed on 03/03/2026

¹⁷² Cluster Agrifood CL.A.N., Roadmap tecnologica e di sviluppo innovativa dell'area di specializzazione Agrifood - aggiornamento 2023, 2023, <https://clusteragrifood.it/wp-content/uploads/2023/09/Roadmap-CLAN-Aggiornamento-2023.pdf> accessed on 09/10/2025

^{173,174} ANSA, Torna a crescere l'agricoltura 4.0, è un business da 2,5 miliardi, 2026, https://www.ansa.it/canale_terraegusto/notizie/progetto_capgen/2026/02/25/torna-a-crescere-lagricoltura-4.0-e-un-business-da-25-miliardi_3184c2c6-0bef-49c8-9bd4-3c681f3d96c0.html accessed on 04/03/2026

¹⁷⁵ Enea, Filiere e Sistemi Agro-alimentari Sostenibili, 2015, https://sostenibilita.enea.it/sites/default/files/allegati/pages/sspt/05-filiere_e_sistemi_agro-alimentari_sostenibili_0.pdf accessed on 09/10/2025

¹⁷⁶ Dipartimento per le Politiche di Coesione, Strategia Nazionale di Specializzazione Intelligente (SNSI), <https://politichecoesione.governo.it/it/politica-di-coesione/strategie-tematiche-e-territoriali/strategie-tematiche/strategia-di-specializzazione-intelligente-s3/s3-nella-programmazione-2014-2020/strategia-nazionale-di-specializzazione-intelligente-snsi/> accessed on 08/10/2025

Trade fairs

Food is everywhere, but industry professionals meet at trade fairs

The Italian trade fair system in the agrifood sector is among the most comprehensive and strategic in Europe, with events serving as genuine international hubs for business, innovation and the promotion of 'Made in Italy'. The framework law on 'Made in Italy', enacted in December 2023, recognised the national trade fair sector as a 'crucial factor in raising awareness and promoting the excellence of Italian products. Here is a detailed overview of the main national and international events.

VINITALY – Verona

The most important Italian event dedicated to wine and spirits. It is held every year in April. Founded in 1967, it celebrated its 57th edition in 2025, welcoming over 97,000 participants and more than 32,000 buyers, around a third of whom

were from abroad, hailing from over 130 countries¹⁷⁷. It includes the events Vinitaly and the City and Vinitaly Tourism.

SIGEP – Rimini

An international trade fair dedicated to ice cream, patisserie, bakery and coffee. It takes place every year in January. Founded in 1980, the 47th edition in 2026 attracted over 198,000 visitors from 160 countries, 1,400 exhibiting brands and 400 events¹⁷⁸.

CIBUS – Parma

International food exhibition, a benchmark for Italian agrifood products since 1985. It takes place every two years in May. The most recent edition, in 2024, recorded over 75,000 visitors, 3,000 brands and 3,000 buyers¹⁷⁹.

CIBUS TEC – Parma

International trade fair for food processing and packaging technologies. It is held every two years in October (next edition: 27–30 October 2026). Founded in 1939, the most recent edition attracted 1,200 exhibitors, 38,000 trade visitors and 3,000 top buyers¹⁸⁰.

TUTTOFOOD – Milan

An international B2B trade fair dedicated to the entire agrifood supply chain. It takes place every two years in spring. Founded in 2007, it reached its 7th edition in 2025, attracting over 95,000 visitors, 3,000 top buyers and 4,200 brands from 100 countries¹⁸¹.

MARCA – Bologna

A trade fair dedicated to private label products, with a focus on packaging, sustainability and innovation for the large-scale retail sector. It has been held every January since 2025. Now in its 22nd edition in 2025, it has hosted over 25,000 visitors and 1,500 exhibitors across an exhibition area of 35,000 m²¹⁸².

MACFRUT – Rimini

An international trade fair dedicated to the entire fruit and vegetable supply

chain (production, trade, technology and logistics). It takes place annually at the Rimini Expo Centre. The 2025 edition (6–8 May) attracted 1,400 exhibitors, over 40% of whom were from abroad, 1,500 top international buyers and around 100 events, including conferences and workshops dedicated to innovations in the sector¹⁸³.

SANA Food – Bologna

A long-established trade fair dedicated to organic and natural products, founded in 1988. Since 2025, it has been held in the new SANA Food format, running concurrently with the Slow Wine Fair. The 2026 edition attracted 300 exhibiting companies, 16,000 visitors and 350 international buyers from 30 countries, with over 2,000 B2B meetings between trade professionals and companies¹⁸⁴.

¹⁷⁷ ANSA, Vinitaly 2025 chiude a quota 97mila visitatori, 2025, https://www.ansa.it/canale_terraegusto/notizie/fiere_eventi/2025/04/09/vinitaly-2025-chiude-a-quota-97mila-visitatori_204ebc24-0b86-41c5-9c20-0b8e78c68d7b.html accessed on 08/10/2025

¹⁷⁸ SIGEP, Facts & Figures, 2026, <https://www.sigep.it/it/sigep/facts-figures> accessed on 08/05/2026

¹⁷⁹ Cibus, Cibus, edizione da record con oltre 75 mila presenze, 2025, <https://www.cibus.it/wp-content/uploads/2024/05/Comunicato-stampa-Cibus-10.05.pdf> accessed on 08/10/2025

¹⁸⁰ CIBUS TEC, Home, <https://www.cibustec.it/it/home/index.php> accessed on 08/10/2025

¹⁸¹ TuttoFood, Il salone internazionale dell'agroalimentare, <https://www.tuttofood.it/> accessed on 08/10/2025

¹⁸² Marca by BolognaFiere, press release, 2026, https://www.marca.bybolognafiore.com/nqcontent.cfm?a_id=5299 accessed on 08/05/2026

¹⁸³ Agenzia Italiana per la Cooperazione allo Sviluppo, La cooperazione italiana in vetrina a Macfrut 2025, 2025, <https://www.aics.gov.it/news/la-cooperazione-italiana-in-vetrina-a-macfrut-2025/> accessed on 03/03/2026

¹⁸⁴ I Grandi Vini, Slow Wine Fair e SANA Food chiudono l'edizione 2026 a Bologna con 16.000 visitatori, 2026, <https://www.igran-divini.com/news/slow-wine-fair-e-sana-food-chiudono-ledizione-2026/> accessed on 08/05/2026

BEER & FOOD ATTRACTION – Rimini

A B2B event dedicated to the beverage, bar and food industries and the out-of-home market. It takes place annually at the Rimini Exhibition Centre. The 2026 edition (15–17 February) attracted over 600 exhibitors from 16 countries, spread across 14 halls, with around 130 international buyers from 45 countries¹⁸⁵.

SALONE DEL GUSTO & TERRA MADRE – Turin

A biennial event organised by Slow Food since 1996, dedicated to food biodiversity and sustainability. It is held every two years in the autumn: the 15th edition, in September 2024, attracted more than 300,000 visitors, with 700 speakers and 3,000 delegates from 120 countries, and featured 250 conferences¹⁸⁶.

FOODEX – Tokyo, Japan

The largest annual food and drink trade fair in Asia. It takes place every March at Tokyo Big Sight. Founded in 1976, it celebrated its 51st edition in 2026: 3,238 exhibiting companies (including 2,126 from overseas) from 76 countries and regions took part, along with over 73,000 registered buyers¹⁸⁷.

ALIMENTARIA – Barcelona, Spain

A biennial international trade fair for the food, drink and food service industries. It takes place at the Fira de Barcelona. The most recent edition, in March 2026, attracted over 3,300 exhibiting companies from more than 70 countries and around 109,600 trade visitors from 120 countries¹⁸⁸.

IFE (International Food & Drink Event) – London, United Kingdom

The UK's largest trade fair dedicated to food and drink. It takes place annually at ExCeL London. Having been running for over 40 years, the 2025 edition attracted 1,500 exhibiting companies from 105 countries and over 25,000 attendees¹⁸⁹.

VITAFOODS EUROPE – Barcelona, Spain

One of the world's leading events for the nutraceuticals, functional foods and food supplements industries. Founded in 1997, after 26 editions it moved to the Fira de Barcelona in 2025. The most recent edition set a new record for the event, with 25,500 attendees and 1,400 exhibitors across 75,000 m² of exhibition space¹⁹⁰.

SUMMER FANCY FOOD – New York, USA

An international trade fair dedicated to gourmet and speciality food products, running since 1955 and considered one of the sector's leading events. The 2025 edition attracted 13,000 trade visitors, including 8,100 buyers, and 2,492 exhibiting companies from numerous countries¹⁹¹.

FRUIT ATTRACTION – Madrid, Spain

An international trade fair dedicated to trade and technology in the fruit and vegetable sector. It takes place annually at the IFEMA Madrid exhibition centre. The 2025 edition attracted 2,485 exhibiting companies from 64 countries, 121,137 trade visitors from 152 countries and covered over 78,000 m² of exhibition space¹⁹².

SIAL – Paris, France

One of the world's largest food trade fairs in terms of the number of products on display. It takes place every two years in October at the Parc des Expositions de Paris-Nord Villepinte. Founded in 1964, the 2024 edition celebrated its 60th anniversary with record figures: 285,000 trade visitors from 200 countries and 7,500 exhibitors from 127 countries¹⁹³.

FHC (FOOD & HOSPI- TALITY CHINA) – Shanghai, China

China's leading trade fair platform for food imports, catering and hospitality. It takes place annually in November at the Shanghai New International Expo Centre.

¹⁸⁵ Italian Exhibition Group, Rimini, da domani al via Beer&Food Attraction 2026: con oltre 600 espositori si accende il mercato della beverage & bar industry, 2026, <https://www.beerandfoodattraction.it/it/dettaglio-comunicato/RIMINI%2C%20DA%20DOMA-NI%20AL%20VIA%20BEER%26FOOD%20ATTRACTION%202026%3A%20CON%20OLTRE%20600%20ESPOSITORI%20SI%20ACCENDE%20IL%20MERCATO%20DELLA%20BE-VERAGE%20%26%20BAR%20INDUSTRY?pressId=7097738> accessed on 03/03/2026

¹⁸⁶ Terra Madre Salone del Gusto, Terra Madre Salone del Gusto 2024: il futuro è qui!, 2024, <https://2024.terramadresalonedelgusto.com/il-futuro-e-qui/> accessed on 08/10/2025

¹⁸⁷ FOODEX Japan, Post Show Report, 2026, <https://foodex.jma.or.jp/en/exhibit/report.html> accessed on 08/05/2026

¹⁸⁸ Alimentaria, Alimentaria + Hostelco successfully closes its most international edition, 2026, <https://www.alimentaria.com/en/press-release/alimentaria/alimentariahostelco-successfully-closes-its-most-international-edition/> accessed on 08/05/2026

¹⁸⁹ International Food & Drink Event (IFE), IFE 2025 Visitor Overview International, 2025, <https://www.feriasalimentarias.com/ife/2026/IFE2025VisitorOverviewInternational.pdf> accessed on 04/03/2026

¹⁹⁰ Vitafoods Insights, Vitafoods Europe 2025 Trend Guide: Product Innovations, Health Trends and Nutrition Science E-mag, 2025, <https://www.vitafoodsinsights.com/personalised-nutrition/vitafoods-europe-2025-trend-guide-product-innovations-health-trends-and-nutrition-science-e-mag-> accessed on 04/03/2026

¹⁹¹ Specialty Food Association, 2025 Summer Fancy Food Show Recap, 2025, <https://www.specialtyfood.com/fancy-food-shows/summer/2025-summer-fancy-food-show-recap/> accessed on 08/10/2025

¹⁹² IFEMA Madrid, Fruit Attraction – Previous edition, 2025, <https://www.ifema.es/en/fruit-attraction/previous-edition> accessed on 04/03/2026

¹⁹³ Business Wire, SIAL Paris 2024 an Exceptional Edition Celebrating Its 60th Anniversary, 2024, <https://www.businesswire.com/news/home/20241121099414/en/SIAL-Paris-2024-an-Exceptional-Edition-Celebrating-Its-60th-Anniversary> accessed on 03/03/2026

Now in its 28th edition in 2025, it welcomed over 3,000 exhibitors and more than 180,000 trade visitors from over 50 international markets¹⁹⁴.

WINE PARIS – Paris, France

A world-leading event for wine and spirits professionals. It takes place every February at Paris Expo Porte de Versailles. The 7th edition in 2026 attracted a record-breaking 63,541 visitors, 51% of whom were international, with 63 exhibiting countries¹⁹⁵.

WINE SOUTH AMERICA – Bento Gonçalves, Brazil

One of Latin America's leading B2B trade fairs dedicated to wine, organised in collaboration with Vinitaly. It takes place every year in May at Fundaparque in Bento Gonçalves, in the Serra Gaúcha, Brazil's main wine-producing region. The 5th edition in 2025 attracted over 430 exhibiting brands—a 20% increase on the previous edition—and over 7,000 professional buyers¹⁹⁶.

FRUIT LOGISTICA – Berlin, Germany

One of the world's leading trade fairs dedicated to the international trade in fresh fruit and vegetables. It takes place annually in February at the Berlin Exhibition Grounds. Founded in 1993, the 2026 edition attracted around 90,000 trade visitors and some 2,600 exhibiting companies¹⁹⁷.

PLMA – Amsterdam, Netherlands

One of the largest international events dedicated to private label products. It takes place annually in May at the RAI Convention Centre in Amsterdam. Founded in 1979, the 2025 edition attracted 3,160 exhibiting companies from 75 countries and over 30,000 trade visitors from more than 125 countries, across 45,000 m² of exhibition space¹⁹⁸.

ANUGA – Cologne, Germany

A biennial international trade fair for the food and drink industry. It takes place in October at the Koelnmesse in Cologne. The 8th edition in 2025 attracted over 8,000 exhibitors from 110 countries and more than 140,000 trade visitors from

nearly 200 countries, across 300,000 m² of exhibition space¹⁹⁹.

AGRISHOW – Ribeirão Preto, Brazil

The leading agricultural technology trade fair in Latin America. It takes place annually between late April and early May in Ribeirão Preto (São Paulo). The 30th edition (28 April – 2 May 2025) attracted 197,000 visitors and over 800 exhibiting brands across 520,000 m²²⁰⁰.

GULFOOD – Dubai, United Arab Emirates

The leading annual trade fair for the food & beverage sector in the Middle East, held at the Dubai World Trade Centre. It takes place every year in February. Founded in 1987, its 31st edition (26–30 January 2026) welcomed 8,500 exhibitors and 268,643 visitors from 195 countries, with more than one and a half million products on display²⁰¹.

¹⁹⁴ USDA Foreign Agricultural Service, Food and Hospitality China, 2025, <https://www.fas.usda.gov/topics/trade-shows/food-and-hospitality-china-1> accessed on 04/03/2026

¹⁹⁵ Wine Paris, press release, 2026, <https://www.comexposium.com/en/newsroom/presse/wine-paris-2026-an-immersive-global-spirit-programme-influence-epicentre-wine-2026/> accessed on 08/05/2026

¹⁹⁶ NB Notícias, Wine South America abre sua maior edição em Bento Gonçalves, 2025, <https://www.nbnoticias.com.br/noticia/101091/wine-south-america-abre-sua-maior-edicao-em-bento-goncalves> accessed on 04/03/2026

¹⁹⁷ Fruit Logistica, comunicato stampa, 2026, https://www.fruitlogistica.com/en/press/press-releases/news_24896.html accessed on 08/05/2026

¹⁹⁸ PLMA International, Press releases, 2025, <https://www.plmainternational.com/events/press-corner/press-releases> accessed on 04/03/2026

¹⁹⁹ EFA News, Anuga 2025: exhibitors rise to approximately 8,000, 2025, <https://www.efanews.eu/item/53666-anuga-2025-exhibitors-rise-to-approximately-8-000.html> accessed on 04/03/2026

²⁰⁰ Prefeitura de Ribeirão Preto, Agrishow 2025 alcança recorde de público e intenções de negócios em Ribeirão Preto, 2025, <https://www.ribeiraopreto.sp.gov.br/portal/noticia/agrishow-2025-alcanca-recorde-de-publico-e-intencoes-de-negocios-em-ribeirao-preto> accessed on 04/03/2026

²⁰¹ Gulfood, Post Show Report, 2026, https://images.mktg.gulfood.com/Web/DWTC01/%7Bbfbca52e-59ce-484e-b0ca-f2e0aa975128%7D_Gulfood2026_-_Post_Show_Report_compressed.pdf?utm_medium=email&utm_source=Eloqua&utm_campaign=Gulfood_PSR_ConfirmationEmail accessed on 08/05/2026

Professional roles

From the field to the factory: jobs in the food sector

The agrifood sector is driven by **professionals with** increasingly complex and multifaceted **technical, professional and cross-disciplinary skills**.

New roles for the green transition

Digitalisation, sustainability, short supply chains, regenerative agriculture, food tech and food safety: the Italian agrifood sector is undergoing a major transformation, creating opportunities for specialised technicians capable of tackling these challenges. The professional roles involved vary, but increasingly include positions linked to innovation, sustainability and quality. Among the emerging and established roles^{202,203,204}:

- **Food technologist:** responsible for product quality, safety and innovation throughout the entire supply chain.
- **Agriculture 4.0 expert:** they apply digital technologies (IoT, Big Data, AI) to optimise production and resource management.
- **Food sustainability expert:** they pro-

mote sustainable agricultural practices, reduces waste and minimises environmental impacts.

- **Food safety expert:** they ensure compliance with regulations and quality standards throughout the supply chain.
- **Chef and pastry chef:** traditional roles that remain in high demand, even in industrial and innovative settings.
- **Food production operator:** they manage the preparation, processing and packaging of food.
- **Food bloggers and food influencers:** they communicate and promote food through digital content and storytelling.
- **Sommelier 2.0:** they share their knowledge of wine via social media and digital platforms, enhancing the shopping experience.
- **Agri manager:** they combine technical and managerial skills to drive innovation in agricultural businesses.
- **Brand ambassador:** they promote brand identity in the agrifood sector through marketing strategies.

Training pathways

Istituti Tecnici Superiori (ITS) and universities offer the most structured pathways for acquiring the specialist and transferable skills required at this stage. The main training opportunities are:

- **Istituti Tecnici Superiori (ITS):** two-year, post-diploma, work-oriented courses leading to an EQF Level 5 qualification. Designed to meet the needs of businesses, with over 50% of hours spent in laboratories or on farms. The employment rate one year after graduation is 84%, and in 93% of cases, graduates secure a role consistent with their course of study²⁰⁵.
- **Bachelor's Degree in Agricultural and Environmental Sciences:** a solid education in agriculture, the environment and sustainability, with a technical and scientific approach.
- **Degree in Food Biotechnology:** focused on innovation in production processes and product quality.
- **Degree in Food Science and Technology:** focused on food safety, processing and preservation.
- **Degree in Gastronomic Sciences, Cultures and Policies** (resulting from a collaboration between the Università La Sapienza di Roma and the Università degli Studi della Tuscia in Viterbo): a multidisciplinary programme focusing on the relationship between food, the local area and wellbeing.

- **Degree in Food and Wine Sciences and Cultures** (Università di Roma Tre): it explores the cultural, economic, legal and communicative aspects of food and wine.
- **Degree in Quality and Sourcing of Raw Materials for the Agrifood Sector** (Università di Parma): a vocationally oriented course in the Food Valley, focusing on the raw materials supply chain.

²⁰² Coldiretti, Lavoro: 5mila nuovi posti per sostenere la digitalizzazione nelle campagne, 2024, <https://www.coldiretti.it/economia/lavoro-5mila-nuovi-posti-per-sostenere-la-digitalizzazione-nelle-campagne> accessed on 08/10/2025

²⁰³ CIA, Assemblea Agia-Cia: le nuove professioni per un'agricoltura più giovane e smart, 2024, <https://www.cia.it/news/notizie/assemblea-agia-cia-le-nuove-professioni-per-unagricoltura-piu-giovane-e-smart/> accessed on 08/10/2025

²⁰⁴ Impronta Etica, Le professioni della sostenibilità: unità organizzative e profili emergenti, 2024, <https://www.improntaetica.org/wp-content/uploads/2024/06/Le-professioni-della-sostenibilita-Unita-organizzative-e-profilo-emergenti-2.pdf> accessed on 08/10/2025

²⁰⁵ INDIRE, Monitoraggio nazionale 2025, 2025, <https://www.indire.it/progetto/its-istituti-tecnologici-superiori/monitoraggio-nazionale/> accessed on 04/03/2026

Italian sounding It is easy to say 'Italy'

'Italian Sounding' is the global practice of marketing **products that evoke Italy without actually being Italian**. This phenomenon exploits images, names and symbols associated with Italian identity (from the tricolour to monuments and even names similar to the real ones) and affects around two in three agrifood products sold abroad as Italian²⁰⁶. Counterfeiting involves labels, composition and production processes, sometimes achieved by adding substances harmful to health.

The phenomenon

On the one hand it is proof of the undeniable appeal of 'Made in Italy', on the other hand, **it causes serious damage to the entire supply chain**, affecting exports, employment and reputation. In 2020, food products were the second most commonly seized category at EU borders²⁰⁷, whilst e-commerce has expanded opportunities for the counterfeit food trade. The scale of the phenomenon is staggering according to Coldiretti, by 2025 the total value of 'Italian Sounding' products is **projected to have exceeded €120 billion**, a third of which is generated in the

US alone, with a predominant concentration in high-income countries, where demand for Italian products is highest²⁰⁸. Slightly lower figures emerge from a study by The European House – Ambrosetti published in 2024, which estimated the value of 'Italian Sounding' at **€98 billion**, of which approximately **63 billion could potentially be recouped** by the Italian agrifood sector²⁰⁹.

Mozzarella, Parmigiano Reggiano and Grana Padano, Provolone and Pecorino Romano are among the most imitated products, followed by cured meats, wines, pesto and extra virgin olive oil²¹⁰. **In the United States alone, over 2.7 billion kg of 'Italian-style' cheeses are produced**, even exceeding the production of local cheeses²¹². The phenomenon is widespread across the globe: according to estimates for 2024, in Japan, non-authentic products account for 70.9% of the total, in Brazil 70.5%, in Germany 67.9% and in Australia 50.2%²¹².

Measures to combat the problem

'Italian Sounding' can be combated through **information, awareness-raising and the strengthening of regulations**. In November 2022, the CIMIM (Comitato per il 'Made in Italy' nel Mondo) was established, co-chaired by the Ministero degli Affari Esteri e della Cooperazione Internazionale (MAECI) and the Ministero delle Imprese e del 'Made in Italy' (MIMIT), with the participation of the Ministero dell'Economia e delle Finanze; the Ministero dell'Agricoltura e della Sovranità Alimentare e delle Foreste and the Ministero del Turismo. MAECI and MIMIT promote and protect 'Made in Italy' through various campaigns and initiatives aimed at raising awareness of and fostering

appreciation for the unique characteristics of Italian products, linked to tradition, craftsmanship and innovation. In October 2023, the European Parliament, the Council of the EU and the European Commission reached an agreement on the new unified regulation²¹³, which concerns PDO and PGI products and came into force in 2024. In particular, it is now **mandatory to include the producer's name on the label** and, for processed products, **the exact quantity of PDO or PGI ingredients used must be specified**²¹⁴. **The use of similar, non-certified ingredients is prohibited**²¹⁵. Protection consortia take on an active role: they can combat abuses, including online, promote the local area and draw up sustainability reports²¹⁶.

²⁰⁶ Coldiretti e Filiera Italia, cited by Gambero Rosso in Italian sounding: cos'è, come funziona e quali danni fa al made in Italy, 2021, <https://www.gamberorosso.it/attualita/italian-sounding-cose-come-funziona-e-quali-danni-fa-al-made-in-italy/> accessed on 08/10/2025

²⁰⁷ La Repubblica, Lotta alla contraffazione: EUIPO nel 2024 nell'UE sequestrati 91 milioni di euro di prodotti, 2025, https://finanza.repubblica.it/News/2025/06/11/lotta_alla_contraffazione_%C2%A0euiipo_%C2%A0nel_2024_nellue_sequestrati%C2%A091_milioni_di_euro_di_prodotti-55/ accessed on 08/10/2025

²⁰⁸ Coldiretti, Giornata contraffazione nel mondo: fasulli due cibi italiani su 3, <https://www.coldiretti.it/economia/giornata-contraffazione-nel-mondo-fasulli-2-cibi-italiani-su-3> accessed on 08/10/2025

²⁰⁹ The European House – Ambrosetti, Gli impatti dell'Italian Sounding per l'Italia, 2024, <https://www.ambrosetti.eu/news/gli-impatti-dellitalian-sounding-per-litalia/> accessed on 04/03/2026

²¹⁰ Coldiretti, Giornata contraffazione nel mondo: fasulli due cibi italiani su 3, <https://www.coldiretti.it/economia/giornata-contraffazione-nel-mondo-fasulli-2-cibi-italiani-su-3> accessed on 08/10/2025

²¹¹ Coldiretti, based on data from the Dipartimento dell'Agricoltura statunitense (Usda) cited by ItaliaaTavola.net in Export agroalimentare negli USA: +11% nel 2025, ma pesa l'incognita dazi, 2025, <https://www.italiaatavola.net/attualita-mercato/2025/5/5/export-agroalimentare-usa-2025-incognita-dazi/112118/> accessed on 08/10/2025

²¹² The European House – Ambrosetti, Gli impatti dell'Italian Sounding per l'Italia, 2024, <https://www.ambrosetti.eu/news/gli-impatti-dellitalian-sounding-per-litalia/> accessed on 04/03/2026

²¹³ Commissione Europea, Geographical indications and quality schemes explained, 2023, https://agriculture.ec.europa.eu/farming/geographical-indications-and-quality-schemes/geographical-indications-and-quality-schemes-explained_en?preflang=it accessed on 08/10/2025

^{214,215} Food&Tec, Approvato il nuovo Regolamento DOP e IGP. Cosa cambia?, 2023, <https://www.foodandtec.com/it-it/approvato-il-nuovo-regolamento-dop-e-igp-cosa-cambia> accessed on 08/10/2025

²¹⁶ CSQA, Con il nuovo regolamento UE più poteri e responsabilità ai Consorzi, 2024, <https://www.csqa.it/it-it/press/con-il-nuovo-regolamento-ue-piu-poteri-e-responsabilita-ai-consorzi> accessed on 08/10/2025

How to promote authenticity in foreign markets

Over the years, the Italian Government has stepped up **measures to support Italian trade fairs of international standing**, alongside the implementation of strategic promotional campaigns in key markets and efforts to combat the 'Italian Sounding' phenomenon, with the involvement of ITA – Italian Trade Agency in managing these plans and supporting the internationalisation of Italian businesses.

Alongside targeted marketing campaigns and international events dedicated to Italian agrifood, proposals are gaining ground, such as including clauses in free trade agreements that prohibit the use of product names that evoke an Italian origin²¹⁷ or the adoption of technological solutions (such as blockchain and smart labelling) that enable product traceability²¹⁸.

Finally, a further boost to the competitiveness of the 'Made in Italy' agrifood sector comes from the trend towards an increase in the average size of companies in the Food & Beverage sector and the creation of business networks – factors which also enhance the sector's capacity for innovation and the effectiveness of marketing strategies, as well as helping to combat 'Italian Sounding'.



Credits: Getty Images

²¹⁷ Commissione europea, Accordo commerciale globale ed economico UE-Canada (CETA), <https://trade.ec.europa.eu/access-to-markets/it/content/accordo-commerciale-globale-ed-economico-ue-canada> accessed on 08/10/2025

²¹⁸ Commissione europea, Accordo commerciale globale ed economico UE Fonte: ITA - Italian Trade Agency, Blockchain, <https://www.ice.it/it/blockchain> accessed on 08/10/2025

Opportunities for international buyers Where tradition and innovation meet in Italy

Italy has long been a sought-after destination for foreign investors wishing to expand their business into one of the sectors of the agrifood industry, a strategic asset for the country's competitiveness. As the EU's third-largest economy, Italy is geographically positioned as a gateway between Europe, Africa and the Middle East, making it a key hub for international trade. The **Italian agrifood sector continues to demonstrate resilience and adaptability**. In the third quarter of 2025, agricultural value added recorded a year-on-year increase of **0.6%**²¹⁹, whilst in the first nine months of the year the **agrifood industrial production index grew by 4.5%**²²⁰. In November, the sector recorded a **5% rise in exports**, exceeding the national average of 3.1% and confirming **its status as one of the driving forces of the national economy**²²¹. This trajectory is also supported by an **unprecedented level of public commitment**: over the three-year period 2023–2025, **€15 billion**

has been made available for the development of the agricultural sector, alongside structural initiatives such as the **Servizio Civile Agricolo**²²². This strength is also reflected in **its leading international rankings**: Italy is the world's leading producer of wine (by volume)²²³ and pasta²²⁴, the EU's leading producer of cheese and the second-largest producer of olive oil²²⁶. The Italian agrifood sector offers **significant potential for packaging**, one of the factors that most influences perceptions of sustainability whilst meeting the

^{219,220,221} Ismea, AgriMercati ISMEA, III trimestre 2025: crescono il valore dell'agroalimentare italiano e l'export, con un nuovo record verso i 73 miliardi, 2026, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13755> accessed on 04/03/2026

²²² Ismea, Rapporto sull'agroalimentare italiano 2025, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13704> accessed on 02/03/2026

²²³ Organizzazione Internazionale della Vigna e del Vino (OIV), Database, 2025, <https://www.oiv.int/it/what-we-do/data-discovery-report?oiv> accessed on 02/03/2026

²²⁴ Il Sole 24 Ore, Italia in vetta per produzione, esportazione e consumo di pasta, 2026, <https://www.ilsole24ore.com/art/italia-vet-ta-produzione-esportazione-e-consumo-pasta-A147CtN> accessed on 02/03/2026

growing demand for ready meals. For **international buyers**, Italy represents a **world-leading agrifood hub**, capable of offering premium products, a traceable supply chain and continuous innovation. The **Italian Food & Beverage sector is now a strategic asset for those seeking excellence**, reputation and potential for international growth. It is not just about numbers: those who invest in 'Made in Italy' food are investing in a **deeply integrated production system** with a strong reputation and significant cultural value. A system capable of effectively combating counterfeiting and the phenomenon of 'Italian Sounding' products, thanks to strict regulations, independent checks and European certifications²²⁷ which offer legal and commercial protection, reinforced by digital tools and regulations that extend this protection online as well.

The main drivers behind the choice

The primary factor driving international buyers to choose Italy is certified quality: **Italy is the European leader in products with Geographical Indications, with 897 registered brands including PDO, PGI and TSG, of which 331 are in the food sector and 530 in the wine sector**²²⁸. These certifications guarantee controlled origin, high standards and supply chain traceability. Innovation and sustainability

are therefore other key drivers for international buyers. **Product innovation** is often linked to **the promotion of tradition**: 'Made in Italy' manages to evolve whilst remaining authentic. The integration of agricultural production, processing, logistics and promotion is a distinctive feature of the Italian model. Foreign buyers find in Italy a **vertical and transparent supply chain**, which is essential for ensuring reliability and compliance with international standards. Italy is also among the European countries with the highest uptake of organic farming: according to the latest available data, in 2024 the area dedicated to organic farming accounted for around one-fifth (20.2%) of the total agricultural area, approaching the 25% target set by the EU's Farm to Fork strategy for 2030²²⁹. A key driver of international relations is the trade fair system, which includes **leading industry events** such as Cibus (Parma), TuttoFood (Milan), SanaFood (Bologna), Vinitaly (Verona) and Macfrut (Rimini). The Italian agrifood sector is not merely a market for finished products, but also a strategic sector for **industrial, logistical and technological investment**, as well as for acquisitions or joint ventures. For example, through investments in high-potential SMEs: food tech start-ups, artisan businesses with PDO/PGI brands, expanding family-run businesses, or in renewable energy for production facilities, the circular economy (recycling, by-products) and bio-based packaging.

Logistics and digital exports also represent an opportunity thanks to the development

of e-commerce, D2C platforms and traceability systems for the foreign market.

THE CHARACTERISTICS OF NATIONAL AGRIFOOD

1

Food culture

Italian food is a social experience, local identity and shared cultural heritage.

4

Local quality "Presidia"

Territorial excellence protected by PDO, PGI labels and networks like Slow Food.

2

Family farming and biodiversity

Small companies hand down agricultural expertise and cultivate unique native varieties.

5

Regional variety

Every area of Italy offers flavours, techniques and distinctive products, not replicable elsewhere.

3

Short supply chains and cooperatives

Sustainable production models that value the territory and reduce distances between producer and consumer.

²²⁵ Il Sole 24 Ore, Formaggio, l'Italia diventa prima assoluta in Europa per export extra Ue, 2025, <https://www.ilsole24ore.com/art/formaggio-1-italia-diventa-prima-assoluta-europa-export-extra-ue-AHNveRPC> accessed on 02/03/2026

²²⁶ Financial Times, Tunisian olive oil production to overtake Italy's after bumper harvests, 2026, <https://www.ft.com/content/bfb0136a-04ab-4b3a-92a3-090cc7557128> accessed on 02/03/2026

²²⁷ Ministero delle Politiche Agricole Alimentari e Forestali, Prodotti DOP, IGP e STG, <https://www.masaf.gov.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/396> accessed on 08/10/2025

²²⁸ Fondazione QualiVita, Osservatorio Italia, 2026, <https://www.qualivita.it/osservatorio/osservatorio-ita/> accessed on 04/03/2026

²²⁹ Ismea, Bio - Ultime dal settore, 2025, <https://www.ismeamercati.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13717> accessed on 04/03/2026

Opportunities for Italian businesses

New global markets

In an increasingly selective and competitive global market, **the Italian agrifood sector represents a strategic lever for international growth.** Exports from the sector are expected to reach a record value of **€73 billion** by the end of 2025²³⁰, with an increase of approximately **63.0%** between 2019 and 2025²³¹. For 'Made in Italy' businesses, and in particular those in the Food & Beverage sector, a **new era of opportunities** is dawning, supported by an integrated system of tailor-made financial and institutional tools.

ITA – Italian Trade Agency, under the supervision of the Ministero degli Affari Esteri e della Cooperazione Internazionale, **supports the internationalisation of Italian businesses**, particularly SMEs, through training, promotion and assistance in foreign markets. Thanks to its presence in more than 60 countries, working in close collaboration with diplomatic and consular missions, ITA – Italian Trade Agency organises hundreds of promotional initiatives at international trade fairs every year. In 2025 alone, **ITA – Italian Trade Agency organised 123 National Pavilions dedicated to 'Made in Italy', involving thousands of Italian companies, and 11 business missions**²³².

These initiatives include bringing buyers to Italian trade fairs, B2B programmes, business matching, and large-scale retail and e-commerce projects with international partners²³³. SMEs can also rely on a catalogue of 28 support services, most of which are provided free of charge, ranging from partner search to market analysis, and delivered through a network of 69 ITA – Italian Trade Agency offices worldwide²³⁴. ITA – Italian Trade Agency also promotes **OpportunItaly**²³⁵, a business acceleration programme designed to **facilitate business matching between Italian companies and foreign operators**. The MAECI leads the strategic coordination between all these stakeholders through the **Piano d'Azione per l'Export**²³⁶, which identifies **priority high-potential regions** such as the United States, Japan, Mexico, Turkey, Brazil and countries in South-East Asia, whilst not neglecting mature markets such as the United Kingdom and Switzerland. The objective? **To increase Italian exports to 700 billion by the end of the current parliamentary term**²³⁷. 'Growth diplomacy' – that is, comprehensive support for Italian exports – is a foreign policy priority for the Government. The Piano

per l'accelerazione dell'export forms part of a broader European and international policy strategy. Within this framework of integrated opportunities, **Italian agrifood businesses have a natural competitive advantage: the value of 'Made in Italy'**, combined with a network of increasingly accessible, digital and sustainable tools. Going global today is not only possible, it is strategic. Doing so with the support of Sistema Italia means reducing risks, increasing visibility and entering new markets with confidence.

²³⁰ Ismea, AgriMercati ISMEA, III trimestre 2025: crescono il valore dell'agroalimentare italiano e l'export, con un nuovo record verso i 73 miliardi, 2026, <https://www.ismea.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/13544> accessed on 02/03/2026

²³¹ Federalimentare, L'export alimentare vola sempre più alto: +9% nei primi 10 mesi del 2024, 2024, <https://www.federalimentare.it/lexport-alimentare-vola-sempre-piu-alto-9-nei-primi-10-mesi-del-2024/> accessed on 07/10/2025

^{232,233,234} | ^{236,237} Ministero degli Affari Esteri e della Cooperazione Internazionale, Piano d'Azione per l'Export Italiano, 2025, https://www.esteri.it/wp-content/uploads/2025/03/Piano_dAzione_export_italiano.pdf accessed on 04/03/2026

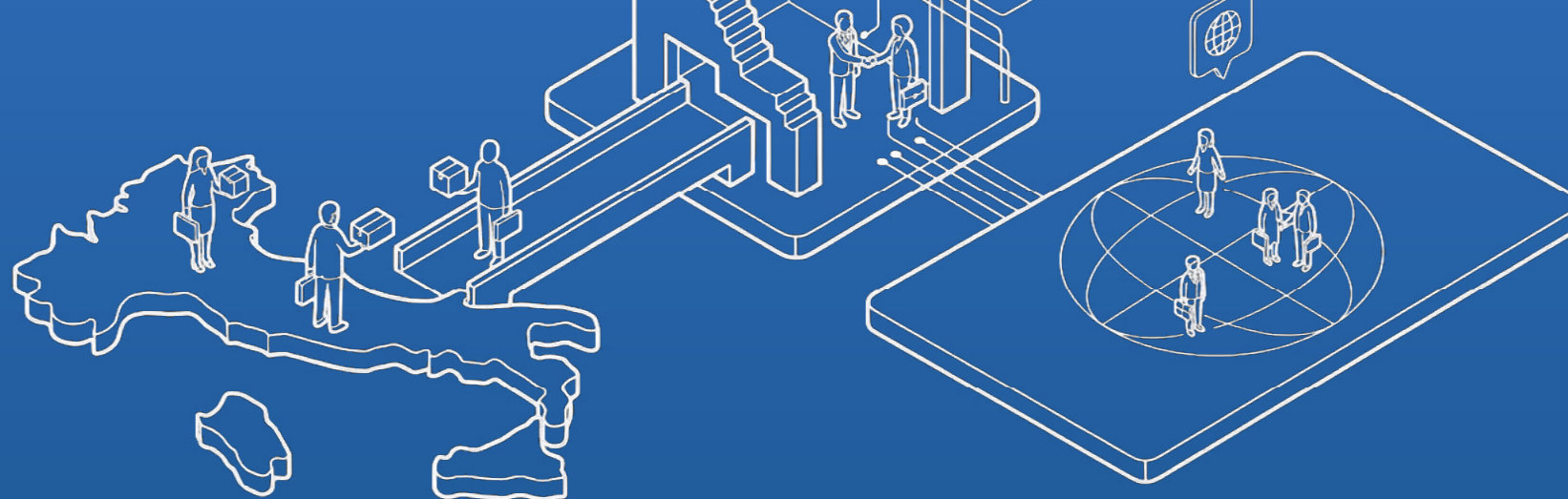
²³⁵ ITA – Italian Trade Agency, Cos'è OpportunItaly – Il programma di accelerazione dell'export italiano, <https://opportunita.gov.it/it/what-is-opportunitaly> accessed on 08/10/2025



Credits: Getty Images

Italy, a land of
excellence,
tradition and
innovation.





ITA - Italian Trade Agency for the Promotion Abroad and Internationalisation of Italian Enterprises

Development and promotion of Made in Italy in the world

ITA – Italian Trade Agency for the Promotion Abroad and Internationalisation of Italian Enterprises – is the body through which the Government fosters the consolidation and commercial-economic development of Italian enterprises in foreign markets. It also acts as the body responsible for promoting the attraction of foreign investment in Italy.

Through its headquarters in Rome, an office in Milan and a global network of 69 Offices and 18 Correspondence Points (for a total of 87 Permanent Structures) in 74 countries, connected to Italian Embassies and Consulates, ITA oversees 133 markets and provides personalised services and assistance to thousands of Italian companies interested in internationalisation.

Through the use of the most modern multi-channel promotional and communication tools and with a global network of experts specialised in foreign markets, ITA facilitates access to international markets and incentivises foreign investment in Italy, enhancing Made in Italy and its excellence.

Lines of action

To increase the flow of exports and investments between Italy and the rest of the world, ITA offers activities in the following areas:

Information

Assistance

Training

Promotion

Attraction of foreign investments in Italy

Export services

- ➔ Immediately available: autonomous access to strategic information and business development opportunities for your company abroad
- ➔ On request: personalised support from specialised ITA Trade Analysts, operating worldwide

Discover all export services at: www.ice.it

Specialised assistance desks:

- ➔ 10 desks dedicated to assistance and protection of intellectual property and trade barriers (at ITA Offices in Buenos Aires, Ho Chi Minh, Kiev, Istanbul, Moscow, New Delhi, New York, Beijing, São Paulo, Tirana)
- ➔ 1 desk dedicated to technical regulations established at the ITA Brussels Office

Export Front Desk

21 desks active in all Italian regions for **personalised and targeted support** with online and in-person meetings.

ITA General Contacts

ITA

Via Liszt, 21

00144 Rome

800 98 98 00 - 06 59921

urp@ice.it - www.ice.it

📷 @itatradeagency

🌐 @ITA - Italian Trade Agency

📺 @Italian Trade Agency

✉ @ITAttradeagency

Sectoral office contacts

Agrifood:

agro.alimentari@ice.it

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