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Food and beverage industry 2025: performance, dynamics and foreign trade

EXCUTIVE SUMMARY

PIANO STRATEGICO DELLA PAC
IL FUTURO DELL'AGRICOLTURA SOSTENIBILE

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Executive summary

Overview: Value Added, Employment, Regional Specialization and Turnover

In 2025, the Italian Food and Beverage Industry (F&B Industry) consolidated its position within the national manufacturing system, accounting for 12.5% of value added and 13.3% of employment. Value added increased by 8% at current prices and by 1.4% in real terms, while employment reached 464,000 work units, representing an increase of 0.8%, in contrast to the decline recorded across the manufacturing sector as a whole.

According to ISTAT data for 2024, the Food Industry (FI) employed 437,469 workers and had an average firm size of 9.1 employees per enterprise, smaller than the manufacturing sector average. The production structure is heavily influenced by the bakery and flour-based products sector, which accounts for 64.4% of enterprises and 40.9% of employees, with an average size of only 5.8 employees per firm. In the other subsectors, firms tend to be larger, averaging around 20 employees per enterprise in the meat sector and 22.4 employees in fruit and vegetable processing. The simultaneous decline in the number of enterprises and the increase in employment suggest an ongoing process of business consolidation. This strengthening is particularly evident in the fruit and vegetable, meat, dairy, oils and fats, grain processing, and animal feed sub-sectors.

The Beverage Industry (BI) employs 41,600 workers, with an average of 13 employees per enterprise. Employment growth coupled with a largely stable number of enterprises indicates a gradual increase in average company size. Wine continues to play a central role within the sector, although its share in terms of both firms and employment has gradually declined. Sectoral resilience has been supported by spirits, soft drinks, mineral water, and, in employment terms, the brewing industry, signal-

ing a gradual rebalancing towards activities outside the wine production.

Productivity levels in the F&B Industry vary considerably across different segments. The beverage industry recorded approximately €128,000 per employee, exceeding both the food industry's €68,500 per employee and the manufacturing average of €81,900 per employee. The comparatively lower productivity of the food sector reflects the weight of bakery products; excluding this segment, productivity rises to €83,800 per employee. Among the activities with the highest productivity are spirits production, soft drinks, grain processing, and animal feed production.

The agri-food industry exhibits a marked geographical distribution in which production concentration and relative specialization shape distinct regional patterns. Northern Italy accounts for a substantial share of national employment, turnover, and value added, and is characterized by larger average firm sizes. In Southern Italy, by contrast, the sector carries a relatively greater weight within regional manufacturing systems. In 2024, agri-food industry employment represented 21.3% of manufacturing employment in Southern Italy and 30.5% in the Islands, compared with 8.2% in the North-West and 11% in the North-East. The stronger relative specialization of southern regions is also reflected in the sector's larger contribution to regional manufacturing value added. Overall, the sector exhibits a dual geographical pattern in which the greater concentration of production in northern regions is accompanied by a higher degree of specialization in southern regions.

The F&B Industry generated an estimated turnover of €204 billion in 2025, increasing its share of total manufacturing output to 16.8%. Growth was driven primarily by the food industry, while the beverage sector recorded a slight decline in the latest year observed. Within the food industry, meat processing accounts for the largest share of turnover, followed by other food products, dairy products, and bakery products. Within the beverage industry, wine remains dominant, representing approximately 44% of total turnover, followed by soft drinks, spirits, and beer.

Approximately 76% of the F&B industry's turnover was generated by Italian-controlled companies, while the share attributable to foreign-controlled firms declined from around 28% in 2010 to 23.9% in the year under review. International markets remained an important driver of growth, particularly for the food industry, where the share of turnover in foreign markets increased significantly, confirming a long-term trend. By contrast, growth in the beverage sector was more moderate. In the year under review, the most dynamic segments in international markets were confectionery products (+11.5%), dairy products (+10.6%), and preserved food products (+8.8%).

The Italian Food and Beverage Industry in the EU-27 Context

Italy continues to rank among the leading European countries in the food and beverage industry. In 2024, it ranked second in terms of the number of food enterprises, fourth in employment, and third in both turnover and value added. Within the food industry, Italy accounts for 17% of all EU-27 enterprises and 10% of total employment, highlighting a more fragmented production structure than that those of its main European competitors. The average business size is 9.7 employees per enterprise, compared with 16.1 in the EU-27 as a whole. The beverage sector is more structured, with an average of 13.7 employees per enterprise, slightly above the EU-27 average of 13.4.

Italy accounts for 12.3% of EU-27 food industry turnover and 14% of beverage industry turnover, ranking third in both sectors. The country also holds third place in terms of value added, accounting for 11.9% of the total food and beverage industry value added in the EU-27.

In 2025, a comparison with the main European producers confirms the greater resilience of the Italian food industry, which recorded growth in both production volumes and turnover. The latter increased by 5.4% compared with 2024, slightly above the EU-27 average of 5.1%. The performance of the beverage sector was weaker, with turnover declining by 1.4%, although the decrease was smaller than the EU-27 average decline of 3.1%.

The Role of the Food and Beverage Industry within the Agri-food System

In 2024, the Italian agri-food system generated €158.4 billion in value added and €680.6 billion in turnover. A combined analysis of these two indicators highlights the different contributions made by the various components of the supply chain to wealth creation and overall economic activity. Agriculture and F&B industry play a central role in generating value added, jointly accounting for 53.2% of the total. Agriculture is the largest contributor to value added, representing approximately 29% of the total, whereas the F&B industry accounts for a larger share of turnover, at around 30%. A comparison with other European countries highlights several distinctive features of the Italian agri-food system. Compared to the rest of the EU,

Italy shows a greater contribution from agriculture, F&B industry, and food service activities to total turnover, while the contribution of the F&B industry to value added is relatively lower.

In terms of turnover, the F&B industry is the largest component of the agri-food system both in Italy and in the EU, with a slightly higher share in Italy.

At the regional level, different configurations of the national agri-food system emerge. The food and beverage industry accounts for a particularly large share of total system turnover in Emilia-Romagna (38%), Piedmont (37%), and Veneto (35%), whereas in other regions agriculture, distribution, or food service activities play a more prominent role. Overall, this picture reveals a highly diversified territorial structure, reflecting the varying importance of industrial processing and of the other components of the agri-food supply chain across regional agri-food systems.

Production, Turnover and Business Confidence Trends in the First Half of 2026

In the first half of 2026, compared with the same period in 2025, production in the food and beverage industry remained broadly stable, with a slight increase in both sectors. Within the food industry, the most significant increases were recorded in fish, fruit and vegetables, and oils and fats, while meat products and bakery products experienced declines. In the beverage sector, growth in alcoholic beverages and soft drinks offset the contraction in wine and beer production.

Turnover showed a weaker performance, declining by 2.6 percentage points, in contrast to the growth recorded in the manufacturing sector as a whole. In the food industry, this decrease was driven primarily by the domestic market, while exports helped support several subsectors. Exports provided a particularly positive contribution to meat products and animal feed segment, while grains, fruit and vegetables, and oils and fats experienced the most pronounced reductions in the foreign share of turnover. In the beverage sector, the decline in turnover resulted entirely due to a marked contraction in export sales. Business confidence among food industry firms remained broadly stable, even though demand remains weak, particularly in international markets. Beverage manufacturers, by contrast, reported a gradual improvement in business sentiment and more favorable expectations regarding future production trends.

Overall, the first half of the year was characterized by modest growth in production and a weak domestic market, nevertheless, expectations among firms in the beverage industry became increasingly positive.

Business Demography and Entrepreneurial Structure at the Regional Level

Based on data from the Business Register, at the end of 2025 the food and beverage sector comprised 65,928 registered enterprises, of which 57,546 were active (87.3%), representing 13.6% of Italy's manufacturing sector. The food industry accounted for 61,593 registered enterprises and 53,832 active enterprises, while the beverage industry comprised 4,335 registered enterprises and 3,714 active enterprises. Compared with 2024, the number of active enterprises in the F&B industry decreased by 770 units (-1.3%), a smaller decline than that recorded in the previous year and that observed in manufacturing as a whole. The balance between new registrations and business closures remained negative (-2,309 enterprises), although it improved compared with 2024. The birth rate rose to 1.6%, while the death rate fell to 5.1%; consequently, the growth rate improved from -4.2% to -3.5%. This improvement has slowed the contraction of the entrepreneurial base, although it has not reversed it.

Sole proprietorships remain the most widespread legal form, accounting for 40.6% of active enterprises, but their number declined by 2.5%. Incorporated companies, representing 33.1% of the total, are the only category to record growth (+1.9%), indicating a gradual shift towards more structured business forms. In the food industry, sole proprietorships predominate (42.1%), whereas in the beverage industry incorporated companies account for 57.4% of enterprises. The analysis by activity branch, including both company headquarters and local units, confirms the importance of the bakery and flour-based products sector. With 38,249 active enterprises, this segment accounts for 57% of the food industry and recorded a slight decline (-0.3%). In the beverage industry, the production of grape wines is the dominant activity, with 3,066 active establishments, representing 54.6% of the total.

At the regional level, although the contraction is widespread, its nature differs across regions, reflecting varying capacities to create new businesses, maintain ex-

isting ones, and compensate for business closures. By jointly considering long-term trends, recent developments, and business birth and death rates, regions can be grouped into four territorial profiles: structural fragility and decline, low vitality or weak resilience, dynamism accompanied by instability, and relative resilience with positive transformation.

In the food industry, the decline in the number of enterprises affects all regions (-7.7% nationally between 2016 and 2025); what differentiates the profiles is their ability to replace businesses exiting the market. In the fragile regions (Basilicata, Calabria, Lazio, Marche, and Tuscany), the reduction has been persistent, and recent improvements have not yet altered the overall trend. In regions characterized by weak resilience (Abruzzo, Campania, Liguria, Sardinia, Sicily, Umbria, and Valle d'Aosta), new business registrations are insufficient to offset closures, even where the long-term contraction has been more limited, such as in Campania (-2.7%) and Sicily (-3.5%). The dynamism observed in Emilia-Romagna, Lombardy, Piedmont, and Apulia shows that a higher business birth rate (2.0% on average over 2023-2025) is not enough to expand the entrepreneurial base, as it coexists with an intense process of business selection (death rate of 5.7%). The resilience of Friuli Venezia Giulia, Molise, Trentino-Alto Adige, and Veneto is mainly due to a lower incidence of business closures (4.9%), resulting in the least negative growth rate (-3.1%) and indicating stability rather than expansion.

In the beverage industry, growth since 2016 (+6%) has not ensured positive outcomes in recent years (-1.2% in 2025). Here, regional profiles are differentiated primarily by business mortality rates, which ranged, on average over 2023-2025, from 2.7% in resilient regions to 5.5% in fragile ones. Fragile regions (Emilia-Romagna, Liguria, Marche, and Apulia) struggle to compensate for business closures, while in regions characterized by weak resilience, long-term growth is not matched by consistently positive recent indicators. In Lombardy and Tuscany, a high business birth rate, the highest among all profiles (1.3%), is offset by an equally high mortality rate (4.8%). By contrast, the resilience of Basilicata, Calabria, Friuli Venezia Giulia, Sardinia, Sicily, Trentino-Alto Adige, and Veneto is based on long-term growth combined with lower exit rates. The agri-food industries and beverage industries therefore follow different trajectories even within the same region. In both sectors, the capacity for renewal depends not only on the creation of new enterprises but also on their ability to survive and remain active over time.

Business Demography Trends in the First Half of 2026

In the first half of 2026, the contraction of the entrepreneurial base of the food and beverage sector continued. As of 30 June, there were 65,420 registered enterprises and 57,016 active enterprises, representing decreases of 1.5% and 1.6%, respectively, compared with 30 June 2025. The decline in active enterprises affected both the food industry (-1.6%) and the beverage industry (-1.7%). New business registrations remained almost unchanged (573), while closures (excluding ex officio deregistrations) declined to 1,411, resulting in a slight improvement in the balance between business entries and exits. Nevertheless, the growth rate remained negative (-1.3%). The reduction in business closures helped alleviate the demographic imbalance but was not sufficient to halt the overall contraction.

At the regional level, Campania accounted for 45.5% of the national decline in active enterprises, with a loss of 414 businesses (-5.6%). Only Veneto and Molise recorded slight increases, while Trentino-Alto Adige remained broadly stable. The balance between new registrations and enterprise cessations (excluding ex officio deregistrations) was negative in all regions, confirming the widespread difficulty in offsetting business exits through the creation of new enterprises.

The Position of the Food and Beverage Industry in Agri-food Trade

In 2025, Italian agri-food trade reached new record levels: imports amounted to €72.45 billion (+10.1% compared with 2024), while exports exceeded €72 billion (+5.6%). The food and beverage industry (F&B industry) maintained a central role, accounting for approximately 86% of agri-food exports and just under 65% of imports. Exports from the food industry increased by 6.6%, reaching €49.5 billion, whereas beverage exports declined by 2.7%, falling to €12 billion, due mainly to lower exports of wine and other alcoholic beverages. On the import side, food industry imports grew by 7.6%, supported in part by higher prices for cocoa and cocoa-based intermediate products, while beverage imports decreased by 2.5%.

Product performance is uneven across categories. Cocoa-based confectionery products remain Italy's leading agri-food export item, exceeding €3.6 billion in value and recording strong growth compared with 2024 (+21.4%). They were followed

by roasted coffee, which surpassed €3 billion in exports (+23.6%). Exports of non-egg, non-stuffed pasta declined to €2.88 billion (-1.9%), despite a 2.3% increase in export volumes. The value of extra virgin olive oil exports also decreased (-17.2%), although export volumes rose by 18.2%, reflecting the sharp decline in international olive oil prices during 2025 following the significant increases recorded in the previous two years.

The United States remain a strategic market; however, in 2025 Italian agri-food exports to the country declined by 4.2%, amounting to €7.55 billion. The decrease affected both the food industry (-2.5%) and, more markedly, the beverage industry (-7.3%), following the introduction of higher tariffs in the second half of the year. Nevertheless, exports of certain products, including pasta, mineral water, and roasted coffee, performed well overall compared with 2024.

In 2025, exports of Made in Italy processed food products and beverages reached €45.8 billion, accounting for 74.4% of total F&B industry exports. This represented an increase of 2.9% over 2024, although growth was slower than that recorded for total F&B exports. Primary processed products generated €27.8 billion in exports (-0.7% compared with 2024), while secondary processed products reached €18 billion, recording growth of nearly 9%, driven in particular by confectionery products, roasted coffee, and bakery products.

Almost half of the Made in Italy exports of processed food products and beverages were destined for four markets: Germany, the United States, France, and the United Kingdom. Germany was the leading destination, with €7 billion in exports and a 15.3% share of the total, followed by the United States with €6.54 billion (14.3%). For primary processed products, the United States remained the main export destination despite declining sales compared with 2024. For secondary processed products, Germany was the principal market, and exports increased to all major destinations, including the United States (+3.7% in value and +7.4% in volume).

Food industry exports were concentrated mainly in Northern Italy. Lombardy and Emilia-Romagna accounted for 19.1% and 18.9% of national exports, respectively, followed by Piedmont (14.2%), Veneto (11.9%), and Campania (10.0%). In 2025, Lombardy recorded almost €9.5 billion in exports and approximately €12 billion in imports, while Piedmont achieved the largest trade surplus in the sector. Although food industry exports grew by 6.6% at the national level, they declined in only three regions: Campania, Sardinia, and, most notably, Tuscany.

In the beverage industry, Veneto ranked first with €3.44 billion in exports, repre-

senting 28.6% of the national total, followed by Piedmont, Lombardy, and Tuscany. Overall, Italian beverage exports declined by 2.7% compared with 2024, reflecting lower exports of wine and other alcoholic beverages and weaker demand from the United States during the second half of the year. Regional trends were more diversified: in 2025, nine regions across Northern, Central, and Southern Italy, recorded growth in export values.

Agri-food Trade in the First Half of 2026

In the first half of 2026, Italy's food and beverage industry (F&B industry) trade showed signs of stabilization compared with 2025. The total value of exports during the semester remained broadly in line with the same period of the previous year's level (+0.3%), with export values close to or exceeding those recorded in 2025 in most months. Imports, by contrast, declined in almost every month of the semester, contributing to an improvement in the agri-food trade balance.

The reduction in the value of imports (-3.9%) reflects both the easing of international prices for certain raw materials and intermediate products and slower growth in import volumes for some product categories. On the export side, the overall stability of export values confirms the resilience of international demand for Italian products despite geopolitical uncertainty, price volatility, and changes in trade policies. Among Made in Italy agri-food products, secondary processed products performed particularly well, especially bakery products and roasted coffee, as well as Protected Designation of Origin (PDO) cheeses. By contrast, primary processed products showed weaker performance, particularly wine and olive oil, which were adversely affected by international demand conditions, price dynamics, and the new tariff regime.

Bakery and Farinaceous Products

Il comparto dei prodotti da forno e farinacei (ATECO 10.7) è la principale componente dell'industria alimentare italiana per numero di imprese. Nel 2025 il comparto conta 40.774 imprese registrate, il 5% in meno rispetto al 2019. In termini di demografia d'impresa, il 2025 si chiude con 1.781 iscrizioni e 2.440 cessazioni, per un

saldo negativo di 659 imprese, che conferma il prevalere delle uscite sulle nuove iniziative imprenditoriali. Le due dinamiche evidenziano un andamento differenziato delle consistenze imprenditoriali, la cui interpretazione richiede di considerare anche le riclassificazioni delle attività economiche.

L'andamento delle imprese presenta infatti differenze significative tra i segmenti produttivi. La panetteria fresca mantiene un ruolo predominante, con 27.474 imprese registrate nel 2025 (67,4% del totale), pur segnando una diminuzione rispetto al 2019 (-7,1%). Nello stesso periodo si riduce anche il numero di imprese registrate nella produzione di paste alimentari (-8,6%) e di prodotti da forno conservati (-7,5%), mentre la pasticceria fresca registra una crescita del 28,5%.

Anche la struttura del comparto presenta alcuni cambiamenti. Tra il 2019 e il 2025 diminuisce il numero delle sedi d'impresa, mentre aumentano le unità locali, che nel 2025 rappresentano il 19,4% delle localizzazioni complessive.

Le ditte individuali si confermano la forma giuridica più diffusa (44,8%), ma cresce il peso delle società di capitale, aumentate del 25,1% rispetto al 2019, a fronte di una riduzione delle altre forme giuridiche.

La distribuzione territoriale delle imprese presenta inoltre differenze tra regioni e comuni, anche in rapporto alla dimensione demografica dei territori.

Il comparto italiano dei prodotti da forno e farinacei presenta una struttura duale, nella quale convivono una diffusa componente artigianale e segmenti maggiormente industrializzati. La produzione di pane e pasticceria fresca concentra il 72% degli addetti, ma si caratterizza per imprese di dimensione contenuta e una produttività del lavoro inferiore a quella degli altri segmenti. Biscotti, prodotti conservati e paste alimentari mostrano invece dimensioni aziendali e livelli di produttività più elevati.

Tra il 2019 e il 2024, la riduzione del numero di imprese si accompagna alla crescita degli addetti e della dimensione occupazionale media, indicando un progressivo consolidamento della struttura produttiva. Nel confronto europeo, l'Italia si colloca, insieme a Francia, Germania e Spagna, tra i principali produttori dell'UE-27 e si distingue per l'elevata diffusione imprenditoriale e la specializzazione nelle paste alimentari.

Nel 2025, la produzione italiana registra una crescita moderata, sostenuta soprattutto dalle paste alimentari, mentre pane e pasticceria fresca rimangono sostanzialmente stabili.

Riguardo alle esportazioni, i prodotti da forno e farinacei superano i 9 miliardi

di euro, mentre le importazioni raggiungono circa 1,8 miliardi, determinando un avanzo commerciale prossimo a 7,2 miliardi. Rispetto al 2019, l'export aumenta di circa il 75% in valore e del 22% in quantità, mentre l'import cresce rispettivamente di quasi il 65% e del 15%, evidenziando per entrambi i flussi un incremento del valore più pronunciato di quello dei volumi.

La pasta alimentare non all'uovo né farcita rappresenta circa un terzo delle esportazioni in valore, con circa 2,88 miliardi di euro nel 2025. Germania, Francia e Stati Uniti sono i principali mercati di destinazione del comparto, con vendite rispettivamente pari a circa 1,27, 1,19 e 1,14 miliardi di euro. Dal lato delle importazioni prevalgono i prodotti di panetteria, biscotteria e pasticceria; la Germania è il principale fornitore di prodotti da forno dell'Italia, seguita dalla Francia. La composizione degli scambi riflette sia la competitività delle principali produzioni italiane sui mercati esteri sia la consolidata integrazione commerciale con i mercati europei.

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