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Italy’s agrifood export districts reached a record nearly €30 billion in 2025

Wine remained the largest export category despite a 1.7% decline, as district shipments outpaced the broader manufacturing sector

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Italian food export districts set a new record in 2025, even as wine sales slipped slightly and remained the country’s largest export category in the group, according to a year-end monitor published by Intesa Sanpaolo’s research department.

The report said exports from Italy’s agrifood districts came close to €30 billion in 2025, up 4.1% from 2024, in what it described as a generally difficult year for the broader sector. Wine led by value at €6.4 billion, despite a 1.7% decline. It was followed by pasta and sweets at €5.5 billion, up 6.1%, and agricultural products at €4.6 billion, up 12.3%.

The findings underline the weight of Italy’s district model in a fragmented food system. Intesa Sanpaolo said agrifood districts accounted for 42% of total Italian agrifood exports and outperformed other manufacturing districts, which posted a 2.2% decline in 2025 from the previous year.

Among individual districts, the strongest by export value were sweets from Alba and Cuneo, with €2.6 billion, up 13.7%; wines from Langhe, Roero and Monferrato, with €1.9 billion, down 0.9%; and Parma’s food district, with €1.7 billion, up 1.4%.

Germany remained the top foreign market for Italy’s agrifood districts at €5.2 billion, up 4%. The United States ranked second at €3.8 billion, down 7.1%. France followed at €3.3 billion, up 4.4%, while exports to the United Kingdom were steady at €2.2 billion.

The report also pointed to faster growth in a range of smaller markets, including Belgium, Switzerland, Canada, Saudi Arabia, the Netherlands and China. It said double-digit gains were also recorded in Spain, Poland, Romania, Russia, Croatia, Israel, Hungary, Portugal and the United Arab Emirates.

For wine, the district data showed more resilience than Italy’s overall export performance. National wine exports fell 3.7% in 2025 to €7.7 billion, based on figures previously analyzed by WineNews from Istat data. By contrast, several major wine districts posted only modest declines.

Langhe, Roero and Monferrato wines fell 0.9%, hurt mainly by weaker sales in the United States, down 9.3%, and Germany, down 8.2%. Those losses were partly offset by growth in Poland, up 103%, and the Netherlands, up 23.4%.

Wines from the Verona area also slipped 0.9% to €1.2 billion. Sales to the United States dropped 13.4%, while exports to the United Kingdom rose 8.9% and shipments to Canada increased 6.8%.

Conegliano-Valdobbiadene Prosecco declined 3.1% to €1.1 billion. The district was affected by lower sales in the United States, down 6.6%, and Canada, down 24%. Growth in France, where exports rose 12.2%, only partly made up for those losses.

Other wine districts also weakened. Exports from the Florentine and Sienese hills fell 2.5% to €834 million, while western Sicily wines and spirits dropped 2.6% to €123 million. Sharper declines were recorded in Trento wines and spirits, down 12% to €367 million, and Montepulciano d'Abruzzo wines, down 13.8% to €218 million.

Still, some wine districts expanded in 2025. Friuli wines and spirits rose 7% to €264 million, while Bolzano wines and spirits increased 1.9% to €252 million. Brescia wines and spirits posted one of the strongest rebounds in the report, rising 27.9% to €175 million after losing about nine percentage points in 2024 compared with 2023.

The data suggest that wine remains central to Italy's export economy even as demand softens in some mature markets, especially the United States. That pressure was visible across several leading districts and was one of the main reasons for weaker results in categories that otherwise held up better than national totals.

Intesa Sanpaolo tied the broader agrifood export growth to continued investment in innovation, sustainability and international expansion among Italian producers. In a statement accompanying the report, Massimiliano Cattozzi, head of agribusiness at the bank's Banca dei Territori division, said the bank had allocated €10 billion for investments across agrifood supply chains and was supporting small and medium-size companies with advisory services aimed at growth and competitiveness.

The bank said its agribusiness network serves more than 80,000 clients through 250 operating points, including 94 specialized branches. Through its supply chain development program, it said it supports 172 agrifood chains, including 36 classified as sustainable, involving more than 8,500 suppliers and nearly 22,000 employees with combined revenue of about €26 billion across sectors ranging from truffles and cured meats to livestock, olive growing and dairy production.