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Italy’s agribusiness sector becomes top contributor to national GDP with record growth and certified product leadership

Food and beverage supply chain drives economic output, employment, and exports but faces challenges from company size and market adaptation

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Italy’s agribusiness sector has emerged as the country’s leading contributor to national GDP, according to new data presented at the 9th Food & Beverage Forum in Bormio. The report, compiled by The European House – Ambrosetti (TEHA), highlights that the food and beverage supply chain accounted for 19.8 percent of Italy’s GDP in 2023 when including both upstream activities such as machinery production and energy supply, and downstream activities like packaging.

The Italian food and beverage sector, which includes agriculture, industry, distribution, and catering, generated a total turnover exceeding 707 billion euros last year. This marks a 34 percent increase compared to 2015. The sector directly employed 5.8 million people in 2023 and produced 74 billion euros in direct value added. This figure is two and a half times higher than the value generated by Italy’s fashion industry and more than five times that of the chemical sector.

Italy also stands out in Europe for its number of certified products. With 891 products holding Protected Designation of Origin (PDO) or Protected Geographical Indication (PGI) status, Italy leads the continent in certifications. These certified products generated 20.2 billion euros in sales last year. Wine remains the top product by value, followed by cheese and meat products. Certified goods now represent 10.8 percent of the sector's total turnover and contribute nearly one-fifth—19.9 percent—to national food exports.

Despite these strengths, the report notes that Italy's agribusiness sector is characterized by a high number of microenterprises. More than eight out of ten companies are classified as microenterprises, but they account for just under 10 percent of the sector's total value added. In contrast, large companies—making up only 0.3 percent of all businesses—demonstrate much higher productivity levels, with an average output per employee of 105,200 euros. This is significantly above the EU-27 average and higher than comparable figures for Spain, Germany, and France.

Valerio De Molli, managing partner and CEO of TEHA, commented on the challenges facing the sector: "The structure of a company affects its ability to cope with geopolitical changes, new regulations and rapidly evolving market demands such as those we are going through." He noted that more than a third of companies—36.5 percent—are currently concerned about sustaining operations, a figure that has risen since last year.

At the forum in Bormio, De Molli outlined policy proposals aimed at supporting the entire agri-food system. These measures include promoting innovation and digitization, simplifying access to credit, enhancing certified supply chains, encouraging sustainability throughout the value chain, attracting young talent through improved training programs, and ensuring a stable regulatory environment.

Benedetta Brioschi, a partner at TEHA, emphasized the importance of certifications for Italian exports: "Certifications not only support exports but also strengthen the global positioning of Made in Italy." She pointed out that Italian agrifood exports command an average value of 254.5 euros per 100 kilograms—the highest among major European countries.

The report concludes that while Italian agribusiness is well positioned globally thanks to its strong tradition of certified products and high-value exports, it faces ongoing challenges related to company size and market adaptation. The sector’s future growth will depend on strategic planning across the entire supply chain and continued investment in innovation and workforce development.