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Regione
Lombardia

THE LOMBARDY AGRI-FOOD SYSTEM

March 2025

The role of the Lombard agri-food system at a national level

The Lombardy agri-food system is the most important at a Italian level and one of the largest at a European level.

The value of agro-food production is almost 18 billion euros and the commercial data are significant.

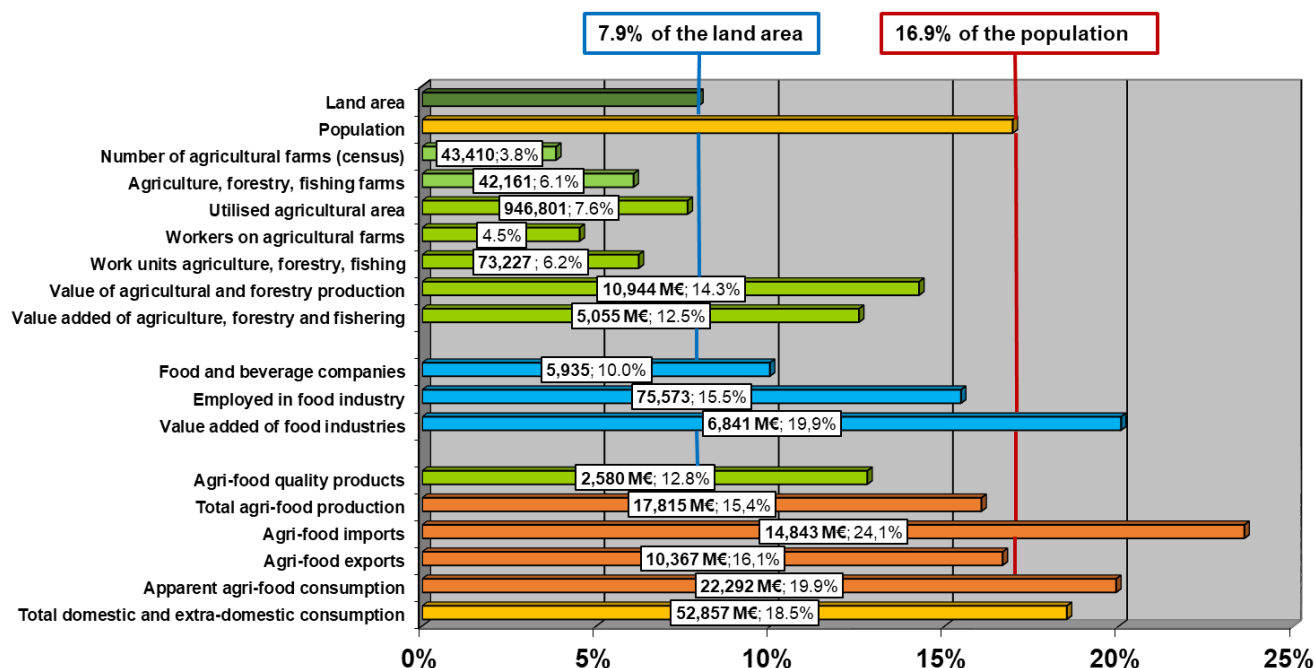
The value of agricultural production is almost 11 billion euros and the contribution to the GDP exceeds 5 billion.

The 43,000 agricultural companies are almost all professional businesses and cultivate an average surface area double the Italian figure.

The 6,000 food companies are equal to 10% of the Italian total but generate 20% of the added value.

The final consumption of the 10 million Lombard's is almost 53 billion, 10% higher per capita than the national average.

Main data of the Lombard agri-food system in 2023

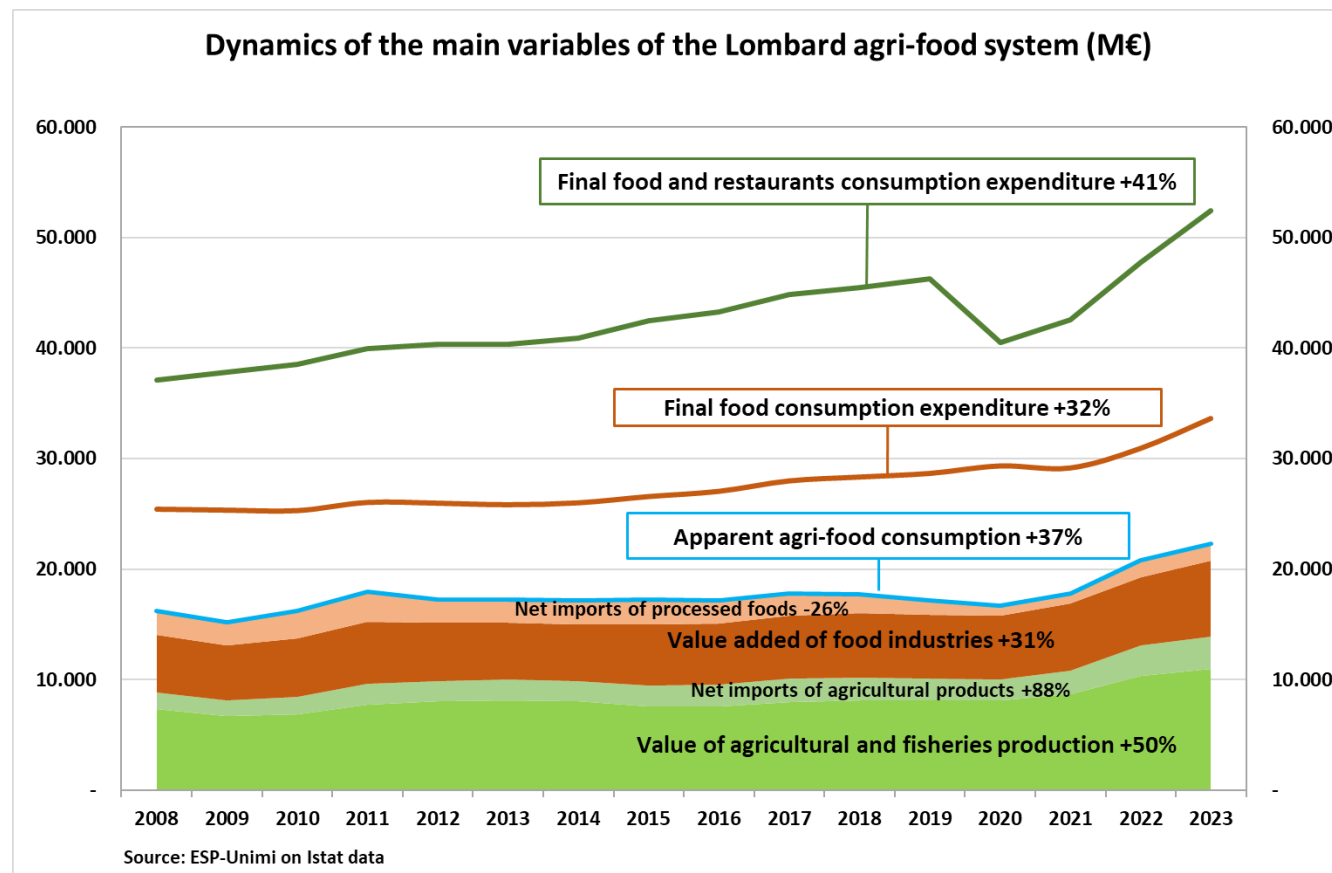


Source: ESP-Unimi on Istat data & Unioncamere

Dynamics of the Lombard agri-food system

The regional agri-food system reacted to the 2008 economic crisis by increasing the value of primary sector production (+50%) and reducing the agri-food trade deficit (which rose by only 21%). Also between 2008 and 2023, apparent agri-food consumption grew in value by 37%, compared to a 32% growth in inflation, while final food consumption increased by 41%.

The quantitative growth in food consumption is due to the increase in out-of-home consumption (+61% between 2008 and 2023), which recovered strongly after the 2020-21 crisis caused by the pandemic. The greater growth in value of agricultural products compared to that of food goods is mainly due to prices (+55% versus +38%).



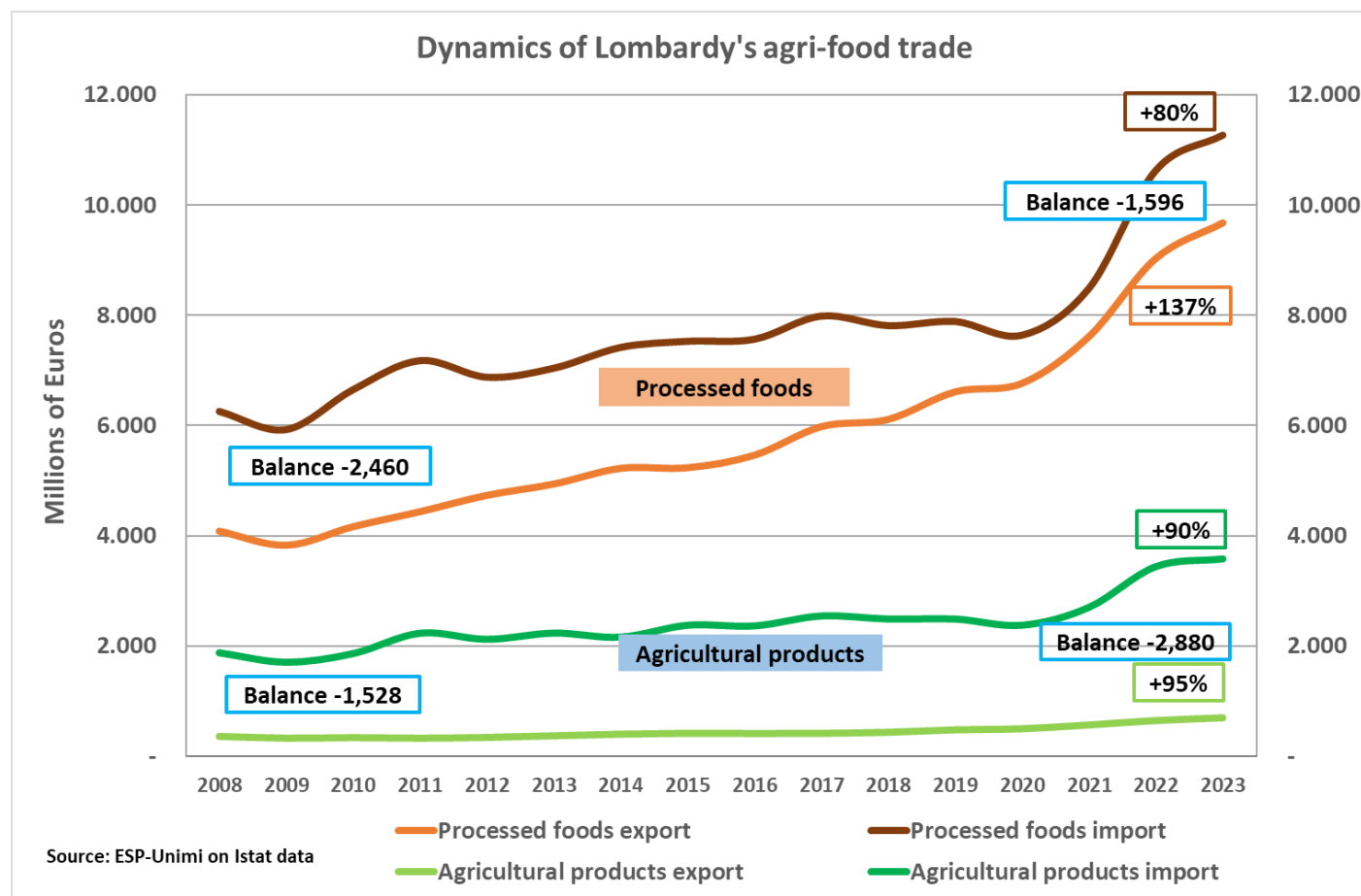
An interconnected agri-food system

The Lombardy agri-food system is strongly connected with those of other Italian regions and other countries.

Over the last 15 years, the global balance of goods has remained negative but has grown by only 12%, compared to the 32% growth of inflation.

The deficit of agricultural products has increased significantly, while it has decreased for food.

The percentage increase in exports is higher than that of imports.

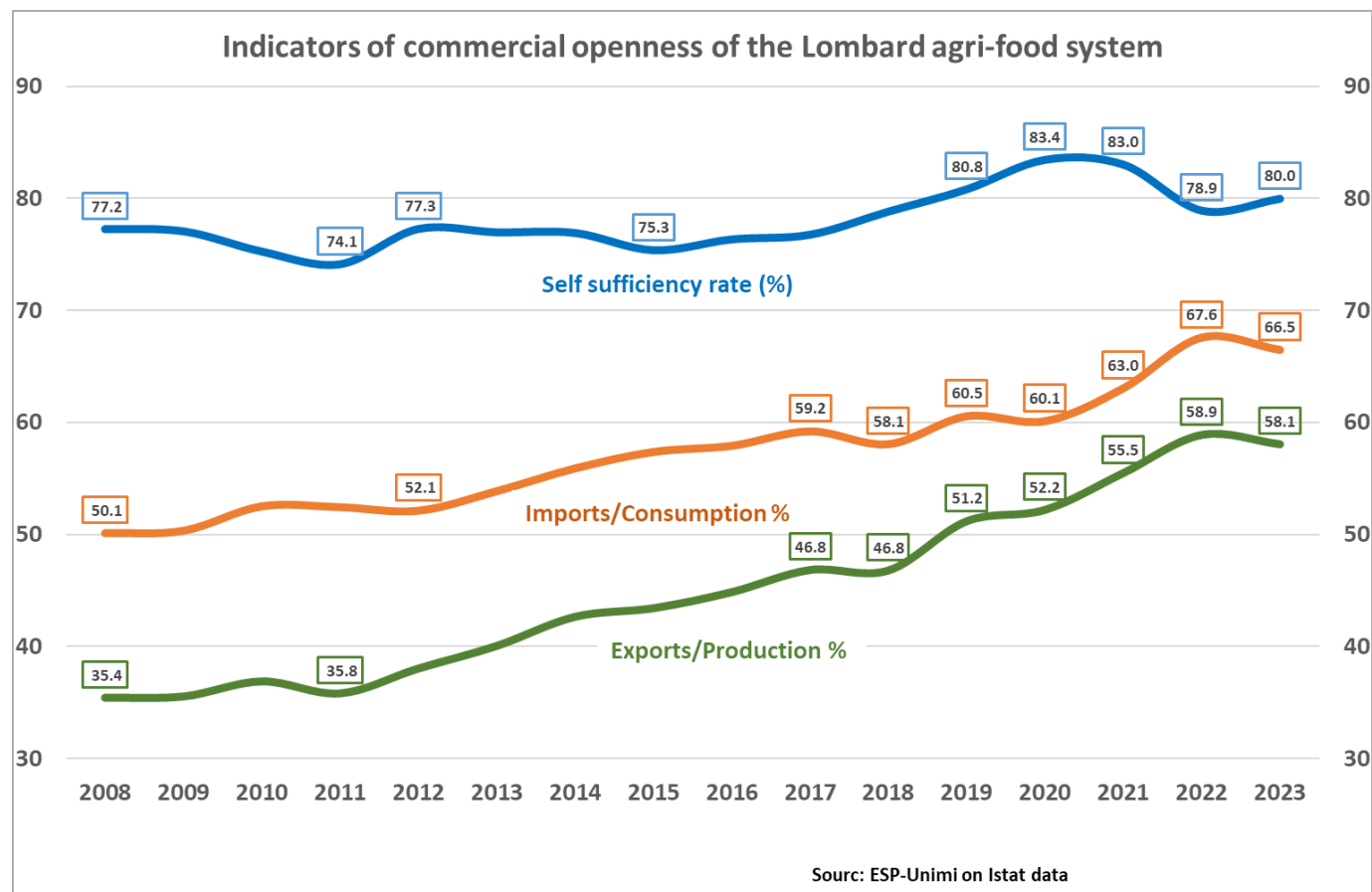


With increasing trade openness

The degree of self-sufficiency is slightly increasing and equal to about 80%.

Trade openness indices are increasing strongly: imports have grown in value from 50% to 67% of apparent consumption.

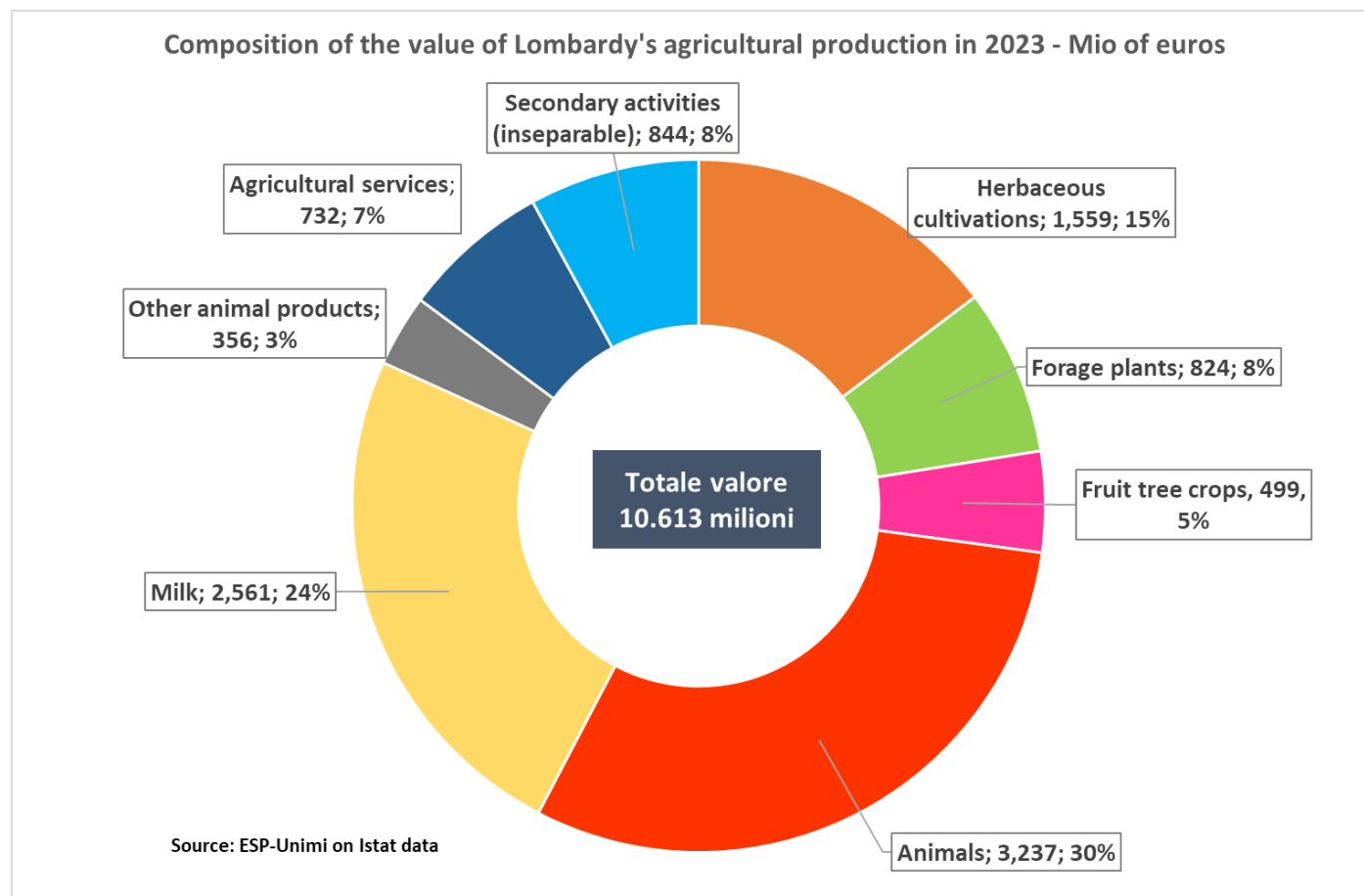
Exports have gone from 35% to 58% in relation to the value of regional production.



The composition of Production at Basic Prices (PBP)

In Lombardy, 58% of the global value comes from animal production, contrary to the Italian composition of the production, which sees vegetable production predominate.

Among the homogeneous groups, meat is the most relevant (30%) while among the products, cow's milk is the most important.



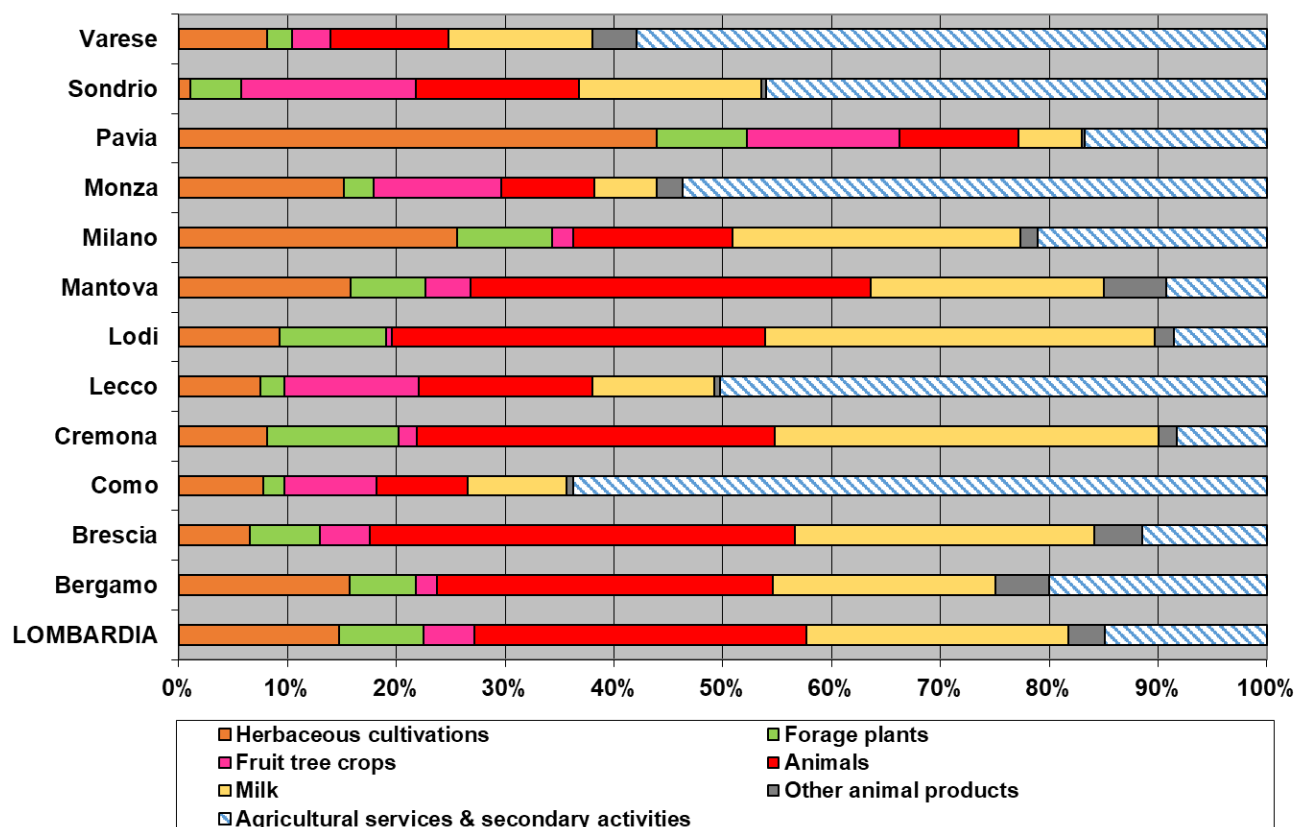
Distribution of production value in the provinces of Lombardy

The provinces of Lombardy contribute differently to the regional value; in terms of sectors, 84% of the plant value is obtained in the provinces of Pavia, Mantua, Brescia, Cremona and Bergamo.

83% of the animal value is concentrated in Brescia, Mantua, Cremona and Bergamo.

From this it follows that the provinces of Brescia, Mantua, Cremona, Pavia and Bergamo represent 81% of the total.

Service and secondary activities take on a decidedly higher weight in the north-western provinces, equal to or greater than 50% in Como, Varese, Monza and Brianza and Lecco, compared to 15% at the regional average level.

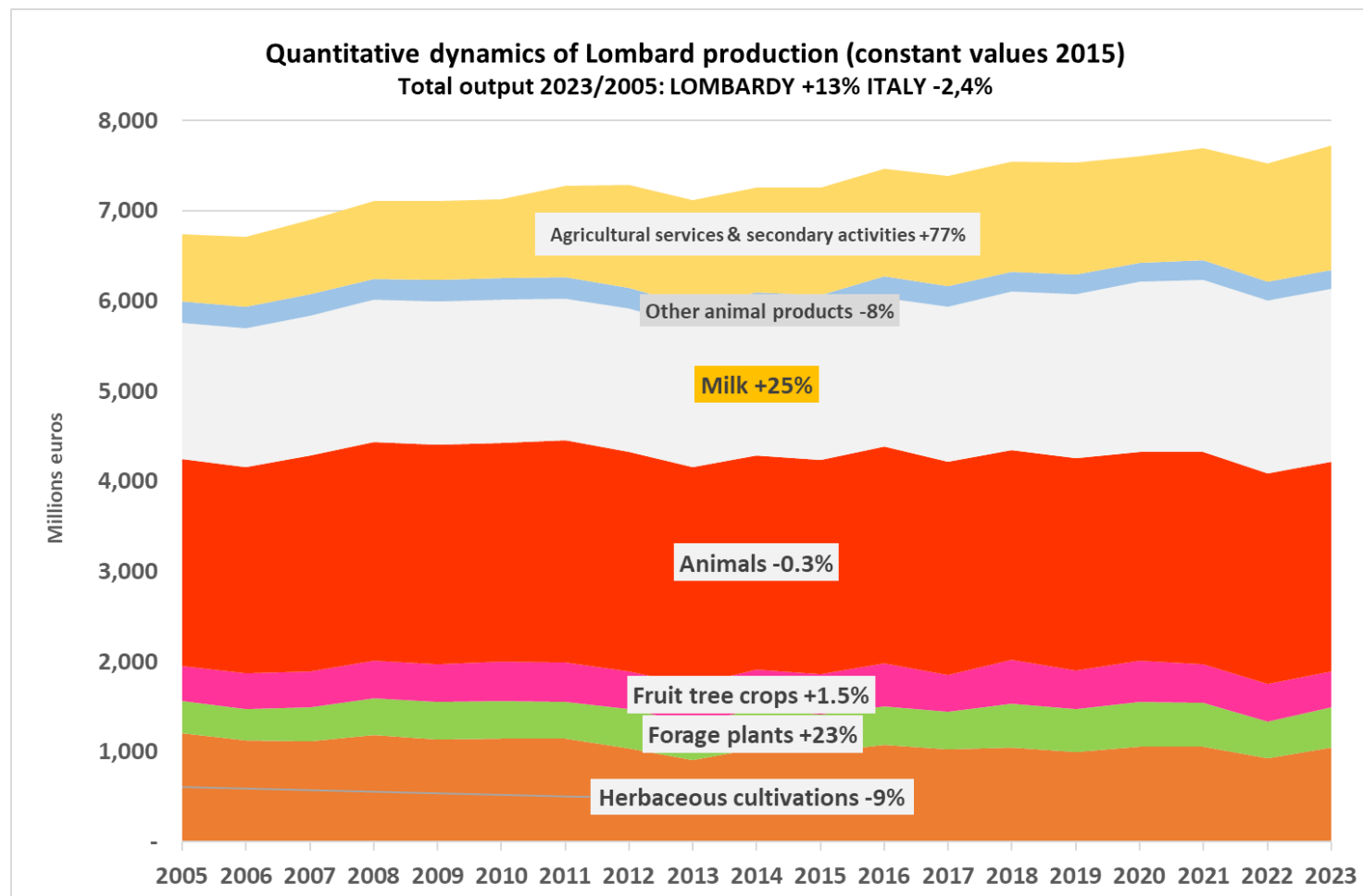


Long-term production dynamics

Between the three-year period 2005-07 (following the CAP reform) and 2023, quantities in Lombardy grew by 13%, compared to a national decline of 2.4%.

Growth was modest for goods (+6%) and strong for services (+77%).

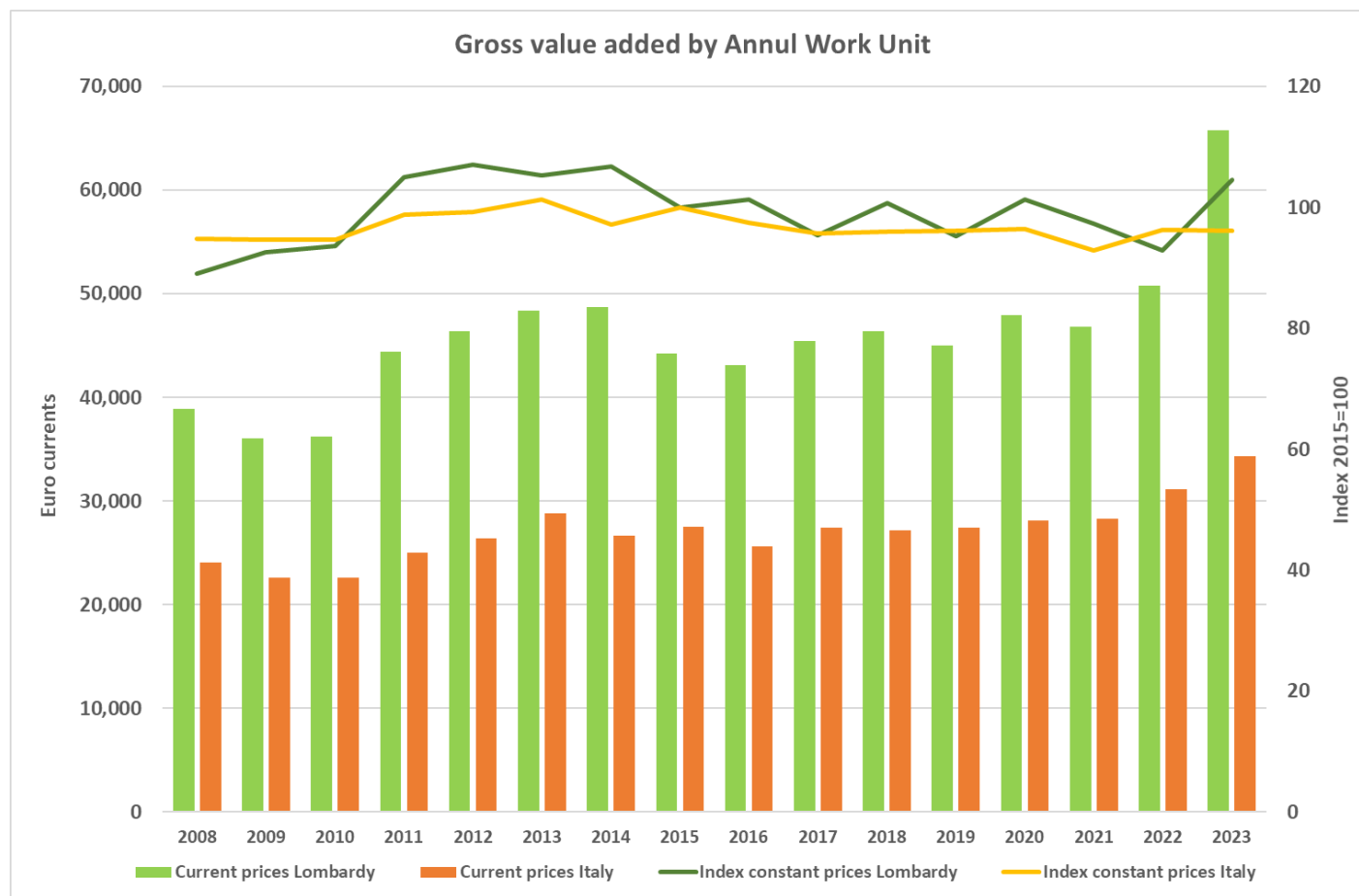
Among the goods in decline were herbaceous crops, while fodder crops and milk increased.



Agricultural income dynamics

Calculating the Gross Value Added per Work Unit we observe that the absolute level at current prices in Lombardy is on average two thirds higher than the Italian figure.

Removing the price variable and transforming the chained value into an index 2015=100 we observe a more fluctuating dynamic in Lombardy but with data often higher than the national ones.



Plant and animal production

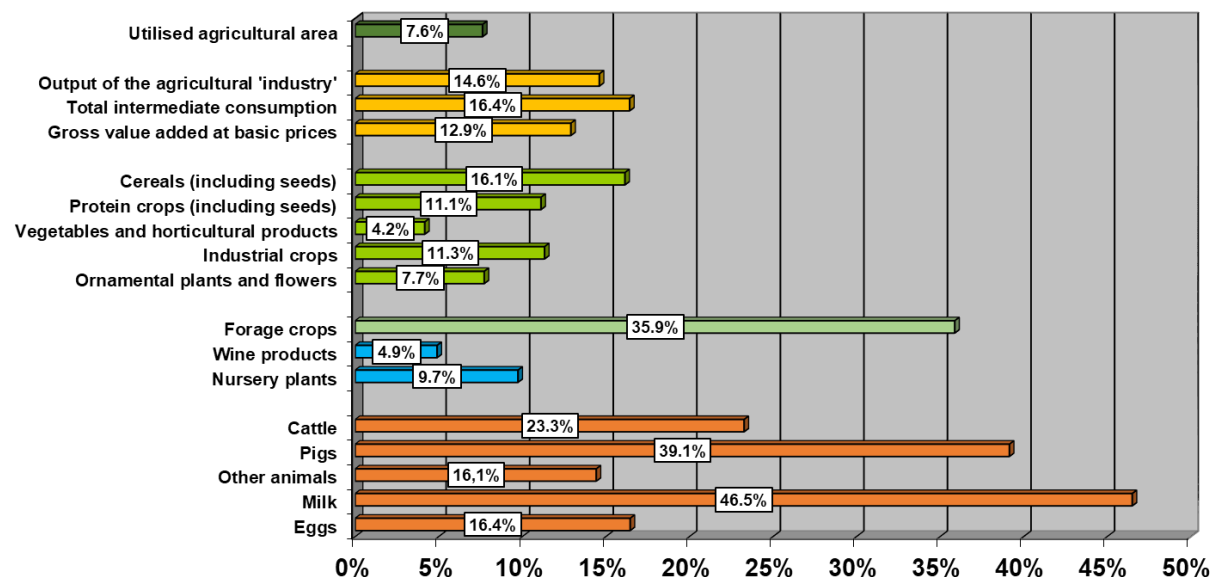
With a utilized surface area equal to 7.6% of the national one, Lombardy agriculture generates a production value almost double (14.6%). This is due on the one hand to a greater productivity of herbaceous crops, dependent on the large availability of irrigation water, and on the other to the significant presence of livestock.

Among animal productions, milk and pork play a strong role.

The presence of tree crops is more limited, but they are characterized by high-quality products.

Livestock activities also require a high use of production factors (feed, drugs, veterinary assistance). Lombardy is therefore the main market for technical means (intermediate consumption).

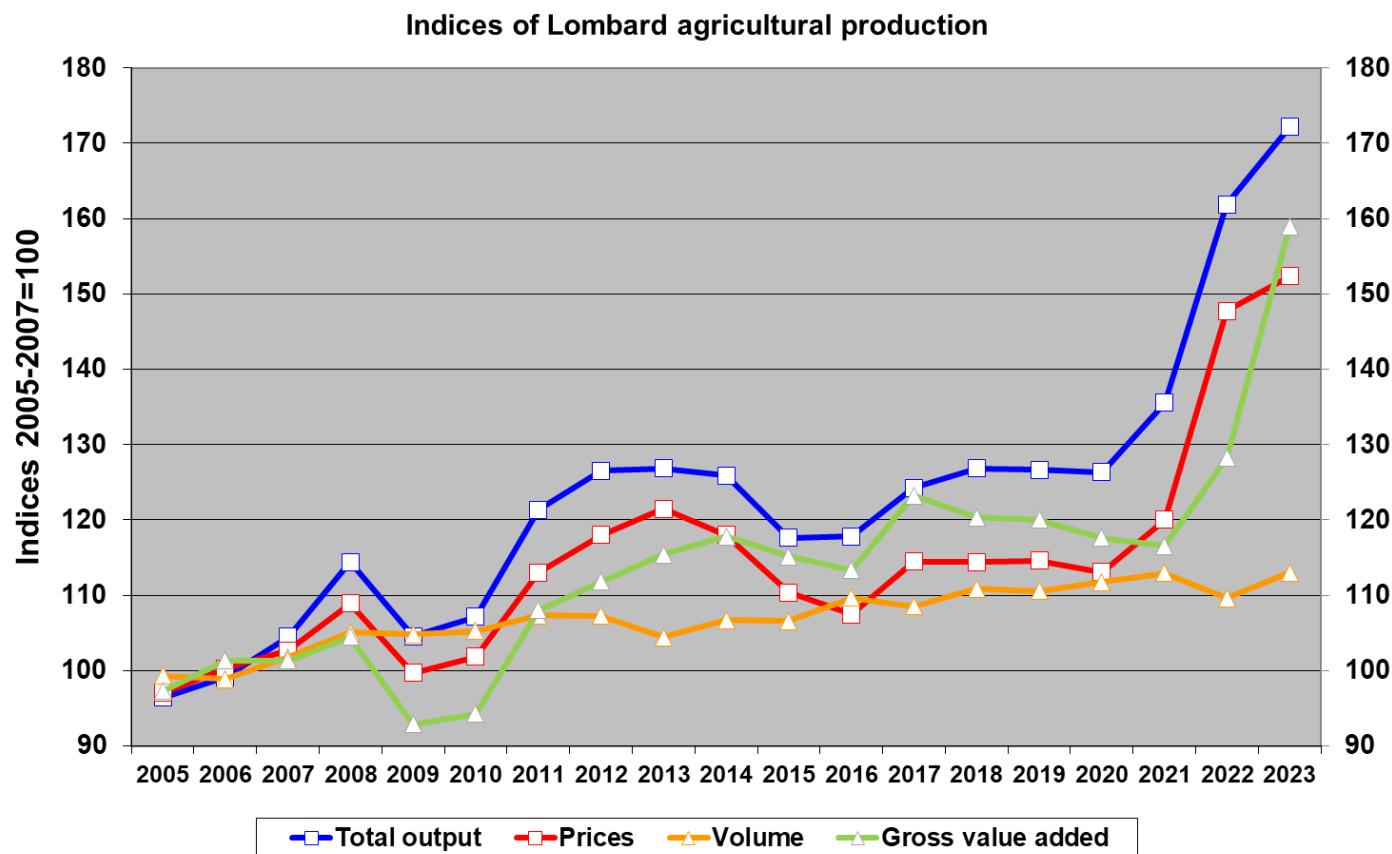
Share of Lombardy productions on Italy total



Source: ESP-Unimi on Istat data

Long-term production dynamics

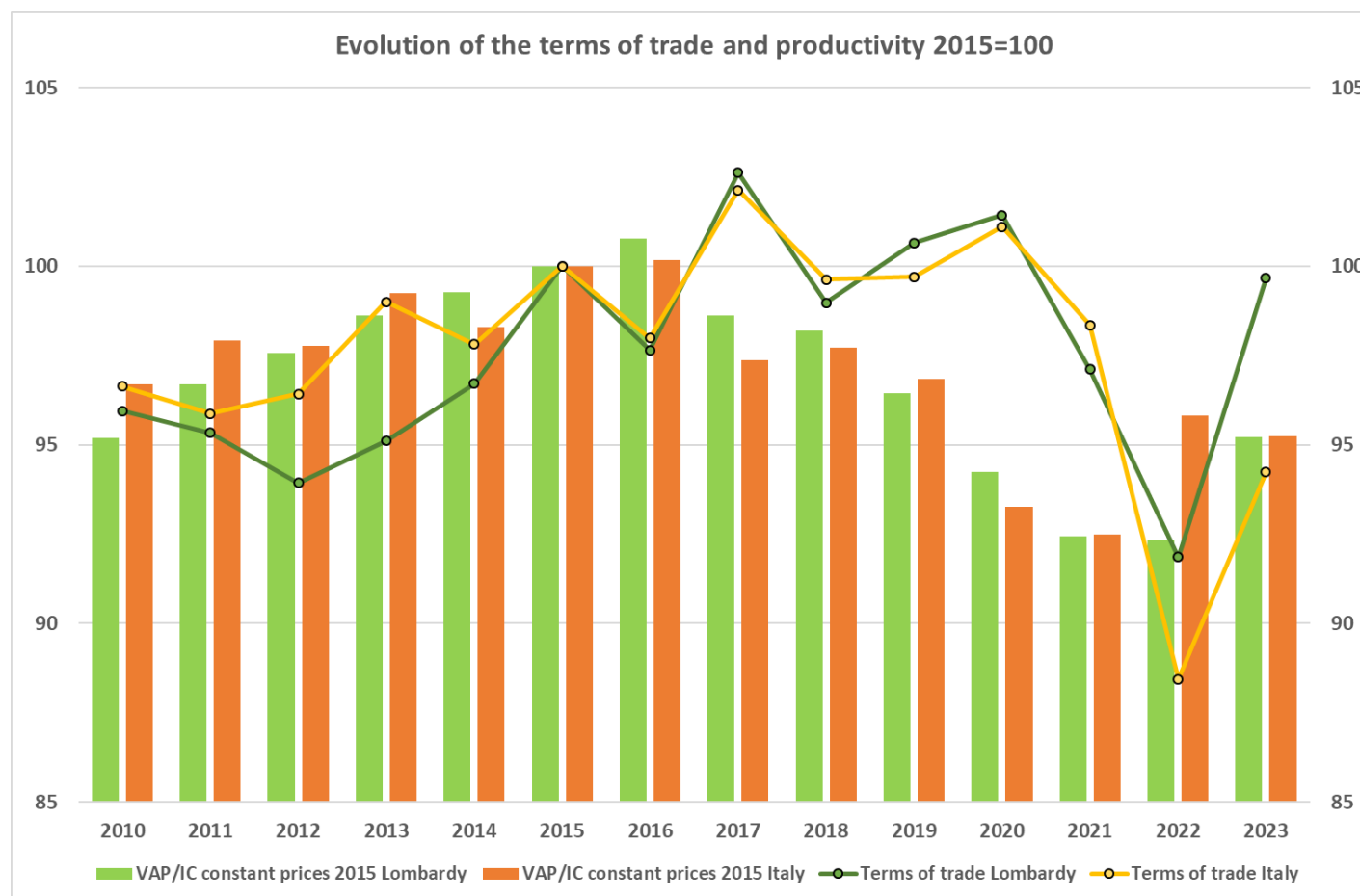
We can observe the progressive slight increase in quantities and the strong oscillation of prices; the process had peaks in 2008 and in the three-year period 2012-14, remained stable between 2017 and 2020 and have undergone a strong increase in the last three years (Covid and war in Ukraine). The variation in values is therefore largely determined by the trend in prices. Due to the greater increase in intermediate consumption, the value added index follows the trend in value but grows less.



Long-term dynamics: factor productivity

By calculating the ratio between production value and intermediate consumption at 2015 chained values (therefore in quantity) and the terms of trade (price ratio), we observe a reduction in factor productivity both in Lombardy and in Italy between 2016 and 2021 and a small recovery in the last two years.

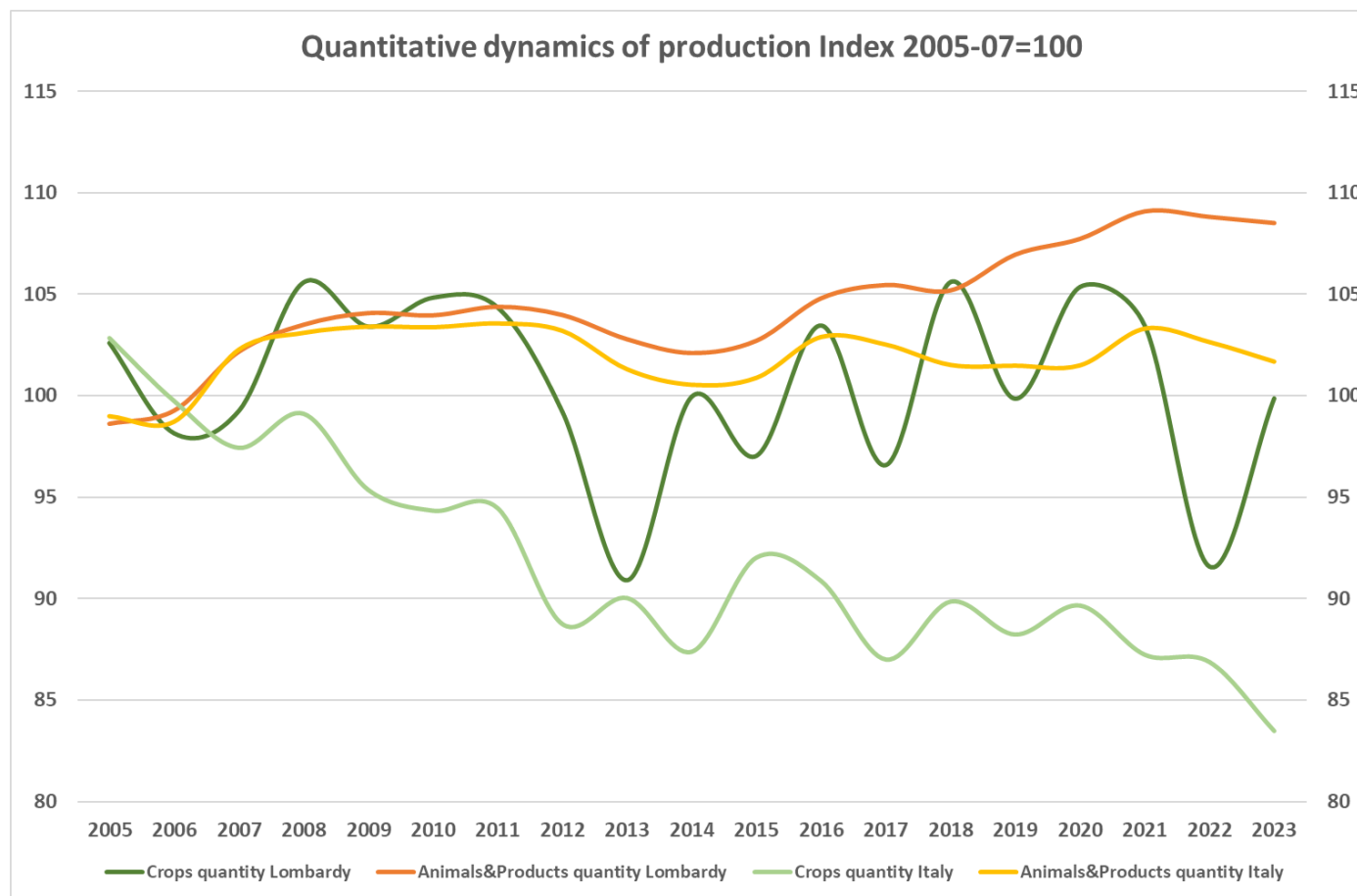
The terms of trade show strong fluctuations and a strongly negative figure in 2022 due to the high increases in raw materials.



Long-term dynamics: plant and animal production

Transforming the chained values at 2015 prices of plant and animal production into indices (three-year average 2005-07) we observe diversified dynamics for plant production (more fluctuating) and animal production (more linear trend).

For both groups, the Lombard dynamics are higher than the similar national ones and show a progressive divergence. In particular, it is highlighted how plant production has decreased in Italy by 16% compared to stability in Lombardy.

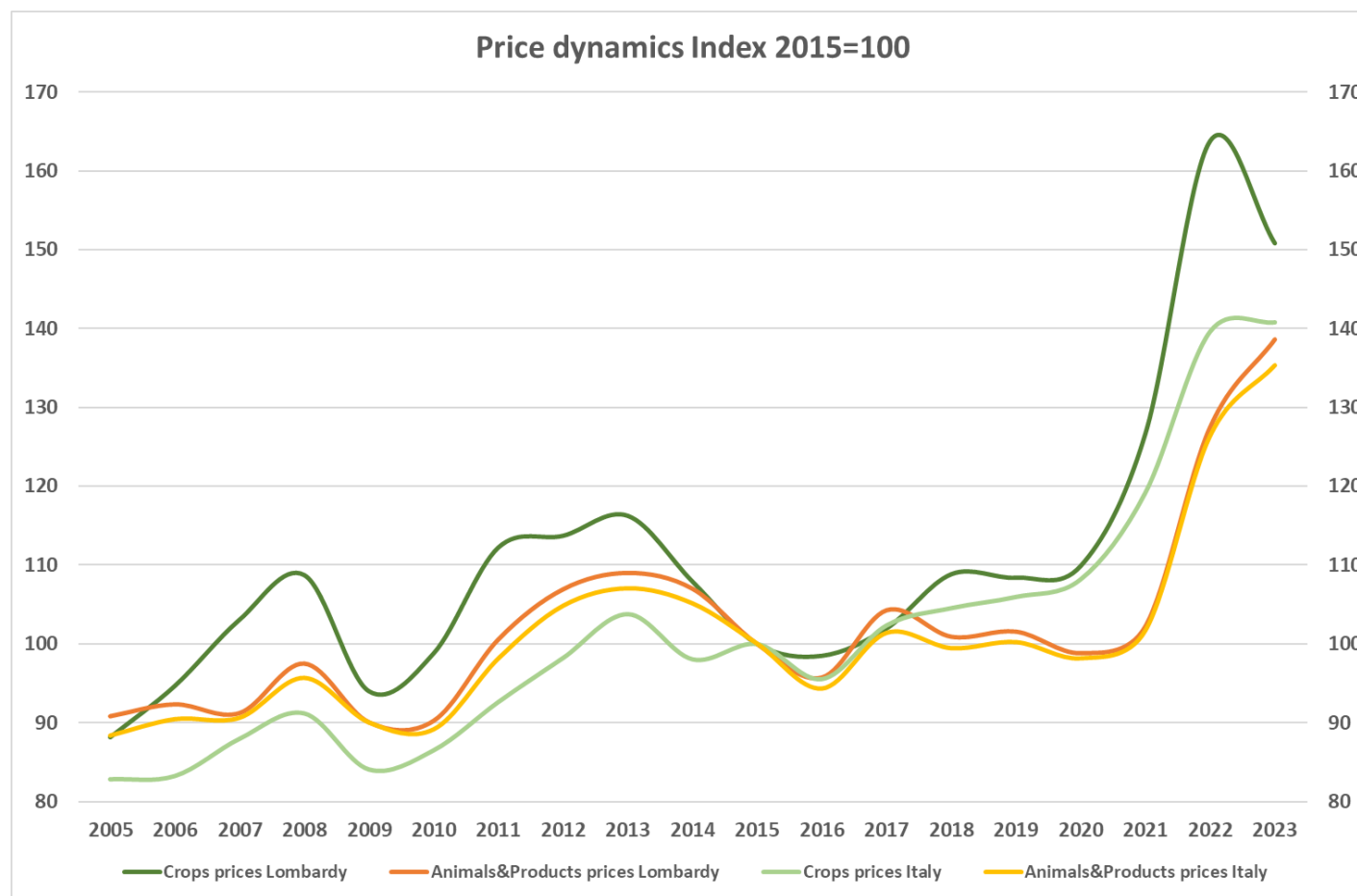


Long-term dynamics: plant and animal prices

The price dynamics can be calculated through the ratio, for production groups, between the series of values at current prices and at 2015 prices.

This results in an index with a base of 2015=100. While the price dynamics of livestock products appear similar in Lombardy and Italy, those of plant products show higher values in Lombardy.

This is due to the different composition of crops in Lombardy compared to the Italian one.

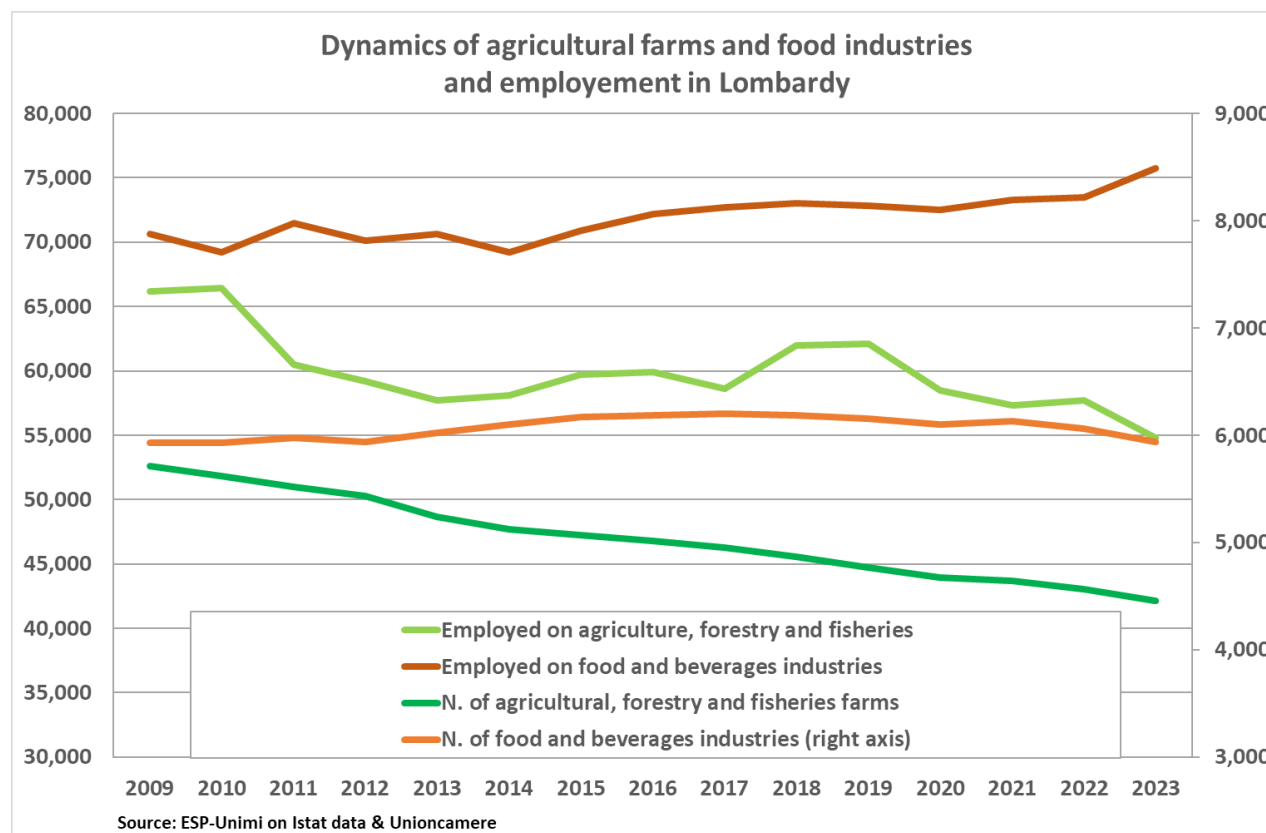


The companies system

Over the last fifteen years, the dynamics of companies operating in the agricultural production and food processing and conservation sectors have shown two opposite dynamics.

Agricultural farms have decreased by 20% and employees by 17%, while companies in the food and beverage sectors have grown by approximately 5% between 2009 and 2017 and then decreased by 5% between 2017 and 2023.

Employees operating in the local units of the food industries in Lombardy, on the other hand, have grown by approximately 7% over the last decade.



The Companies System: Food and Beverage

Food companies based in Lombardy are on average small (less than 15 employees) given the presence of many artisanal companies in the bakery sector. These make up 61% of companies but only 26% of employees.

After this group, the sectors with the highest employment are: meat processing, dairy industry, production of soft drinks and mineral waters.

	<i>Active companies</i>	<i>Employees</i>	<i>% companies</i>	<i>% employees</i>
10: Food Industries	5,613	77,778	95%	90%
101: Meat and meat products	586	15,409	10%	18%
102: Fish, crustaceans and molluscs	27	519	0%	1%
103: Fruit and vegetables	117	4,640	2%	5%
104: Vegetables and animals oils and fats	49	978	1%	1%
105: Dairy industry	322	10,863	5%	13%
106: Grains, starches and starchy products	125	2,868	2%	3%
107: Bakery and flour products	3,640	22,785	61%	26%
108: Other food products	643	14,359	11%	17%
109: Products for animal feed	104	1,888	2%	2%
11: Beverage industry	322	8,990	5%	10%
1101: Distillation, rectification and blending of spirits	67	1,955	1%	2%
1102: Wines from grapes	90	973	2%	1%
1103: Cider and other fruit-based wines	2	1	0%	0%
1104: Other non-distilled fermented beverages	10	12	0%	0%
1105: Beer	109	563	2%	1%
1107: Soft drinks, mineral waters, other waters	44	5,424	1%	6%
Total food and beverage	5,935	86,768	100%	100%

Source: ESP-Unimi on Infocamere data

The companies system: agriculture, hunting, forestry and fishing

Most of the farms in the primary sector are specialized in a production sector.

Over half in plant production (arable crops 41% and tree cultivations 13%).

Livestock farming is present in 38% of the companies, in over half of the cases as the main activity.

The average number of employees is 1.67 and only in a few cases does it exceed three units: cultivation of vegetables, flowers, pig farming, support activities.

Hunting, forestry and fishing are marginal activities both in terms of numbers and employees.

	Active companies	Employees	% companies	% employees
1 FIELD CROPS	17,442	23,711	41%	34%
Cereals, oilseed and protein crops	13,391	12,490	32%	18%
Horticulture	2,115	6,823	5%	10%
Floriculture	1,134	3,811	3%	5%
Mixed field crops	802	587	2%	1%
2 PERMANENT CROPS	5,301	8,033	13%	11%
Vineyards	2,842	5,751	7%	8%
Fruits and mixed permanent crops	2,459	2,282	6%	3%
3 PLANT REPRODUCTION	601	2,096	1%	3%
4 LIVESTOCK	8,379	15,196	20%	22%
Cattle and buffaloes	4,106	8,320	10%	12%
Sheep and Goats	864	816	2%	1%
Horses	722	727	2%	1%
Pigs	553	2,165	1%	3%
Poultry	536	1,414	1%	2%
Other livestock	1,469	1,353	3%	2%
Mixed livestock	129	401	0%	1%
Field crops-livestock combined	7,732	11,308	18%	16%
AGRICULTURAL PRODUCTION ACTIVITIES (1-5)	39,455	60,344	94%	86%
6 AGRICULTURAL SUPPORT ACTIVITIES	1,548	8,264	4%	12%
Plant production support activities	1,006	5,570	2%	8%
Livestock production support activities	205	371	0%	1%
Other production support activities	337	2,323	1%	3%
7 HUNTING INCLUDING RELATED SERVICES	6	10	0%	0%
8 FORESTRY AND RELATED SERVICES	1,002	1,662	2%	2%
9 FISHERIES AND AQUACULTURE	150	210	0%	0%
TOTAL	42,161	70,490	100%	100%

Source: ESP-Unimi on Infocamere data

Surfaces cultivated in Lombardy (hectares)

In the last five years, cultivated areas have remained stable overall, with a slight reduction in first-crop areas and an increase in repeat crops.

Among cereals, almost stable, increase for winter crops, continuous decline in corn, problems for rice. Increase for oilseeds and vegetables.

Decrease in temporary meadows. Increase for grasslands with stability of green maize and increases for other monophytes.

Fluctuating dynamics for fallow land in accordance with CAP regulations. Progressive decline in permanent forage crops and permanent crops: decline in areas of vines and fruit trees, stable in those of olive trees.

Hectars by type of crops in Lombardy

	2024	2024%	2024/20%	2024/23 %
ARABLE LAND (all harvest)	860,516	100.00	2.5	-0.4
Cereals, of which:	322,990	37.5	-0.4	-1.8
Wheat and spelt	79,411	9.2	30.6	-9.5
Rice	95,313	11.1	-2.6	13.8
Grain maize and corn-cob-mix	115,820	13.5	-15.2	-0.4
Dry pulses and protein crops	5,161	0.6	-19.8	7.3
Oilseed crops	58,680	6.8	22.0	-8.5
Sugar beet	2,111	0.2	49.5	36.9
Potatoes and Fresh vegetables	24,497	2.8	21.0	11.8
Temporary grasses and grazings, of which:	351,347	40.8	5.6	0.3
Green maize	188,289	21.9	-2.2	2.3
Plants harvested green from arable land	78,173	9.1	-13.1	-1.3
PERMANENT GRASSLAND	192,908		-6.7	-0.3
PERMANENT CROPS	30,279	100.0	-8.1	-0.9
Wine grapes	22,773	75.2	-7.8	-0.6
Olive	2,398	7.9	0.0	1.2
Fruits, berries and nuts, of which:	5,108	16.9	-12.7	-3.3
Apple tree	1,349	4.5	-18.7	-5.5

Source: ESP-Unimi on Istat Data, DGA Regione Lombardia e Ente Risi

Main agricultural productions of Lombardy (thousands of tons)

Over the last five years, the quantities of agricultural goods produced as a whole have remained largely unchanged.

However, the different responses of crops to weather trends and market dynamics have led to even large fluctuations in the various productions.

In 2024, there were heavy production drops for cereals (except rice), vegetables, oilseeds and wine. Due to weather trends on yields, all crops show significant fluctuations. Particularly unfavorable years were 2022 due to drought and 2024 due to excessive spring rainfall that delayed sowing. Problems also caused by plant diseases.

	2024	2024/20 %	2024/23 %
Cereals, of which:	2,362	-17.5	-14.1
<i>Common wheat and spelt</i>	402	17.5	-23.7
<i>Rice</i>	536	-17.5	11.3
<i>Grain maize and corn-cob-mix</i>	1,240	-27.0	-16.4
<i>Other cereals</i>	184	7.1	-28.7
Oilseed crops	184	-2.6	-20.9
Potatoes and Fresh vegetables	918	-8.6	-2.4
Fruits, berries and nuts	73	-6.6	4.8
Wine (.000 hl)	1,063	-29.3	-15.8
Cattle meat	297	-0.4	1.3
Pork meat	771	-6.5	0.8
Poultry meat	324	-0.6	4.7
Cow milk deliveries (.000 hl)	5,943	9.0	2.0
Eggs (millions of pieces)	2,184	1.2	0.3

Source: ESP-Unimi on Istat Data, DGA Regione Lombardia e Ente Risi

Animal production and stocks of Lombardy farms

More limited variations for animal production.

In 2024, increases for all the main animal productions.

In recent years, the number of farms has continued to decline, except for sheep and goats.

Livestock raised is also decreasing, except for dairy cattle. The average size of dairy cattle farms and production yields are increasing, both positioned at excellent levels.

	2024	2024/20 %	2024/23 %
Cattle farms	11,455	-10.6	-2.6
<i>Dairy cattle farms</i>	4,961	-5.0	-1.6
<i>Beef and mixed cattle farms</i>	6,494	-14.4	-3.3
Sheep and goat farms	10,886	1.8	-0.5
Pig Farms	2,415	-11.1	-5.1
Cattle heads total	1,509,028	-0.6	-0.7
<i>Dairy cattle heads</i>	1,134,197	6.0	0.7
<i>- of which dairy cows</i>	571,803	5.5	1.2
<i>Beef cattle heads</i>	374,832	-16.4	-4.7
Milk yield (kg/cow/year)	10,705	3.4	0.8
Cattle slaughtering	730,267	0.7	1.3
Sheep and goat heads	191,291	-8.6	-3.6
Pig heads	3,843,110	-12.3	-5.3
Pork slaughtering	4,611,994	-15.0	-9.4
Cattle medium consistency	131.7	11.2	2.0
Dairy cattle medium consistency	228.6	11.5	2.4
<i>- dairy cows medium consistency</i>	115.3	11.0	2.8
Beef cattle medium consistency	57.7	-2.2	-1.4
Sheep and goat medium consistency	17.6	-10.2	-3.1
Pigs medium consistency	1,591	-1.3	-0.2

Source: ESP-Unimi on Anagrafe Zootecnica and AGEA



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