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Regione
Lombardia

THE PIG SECTOR IN LOMBARDY

March 2025

01

THE AGRICULTURAL PRODUCTION

Structural characteristics and production trends in
in the pig sector

Lombardy production for pig farming in 2023

In 2023 Pork meat:

- in quantity -0.1% compared to 2022;
- in value +22.3% compared to 2022.

Long-term trends for pig farming:

quantities stable and value strongly influenced by price.

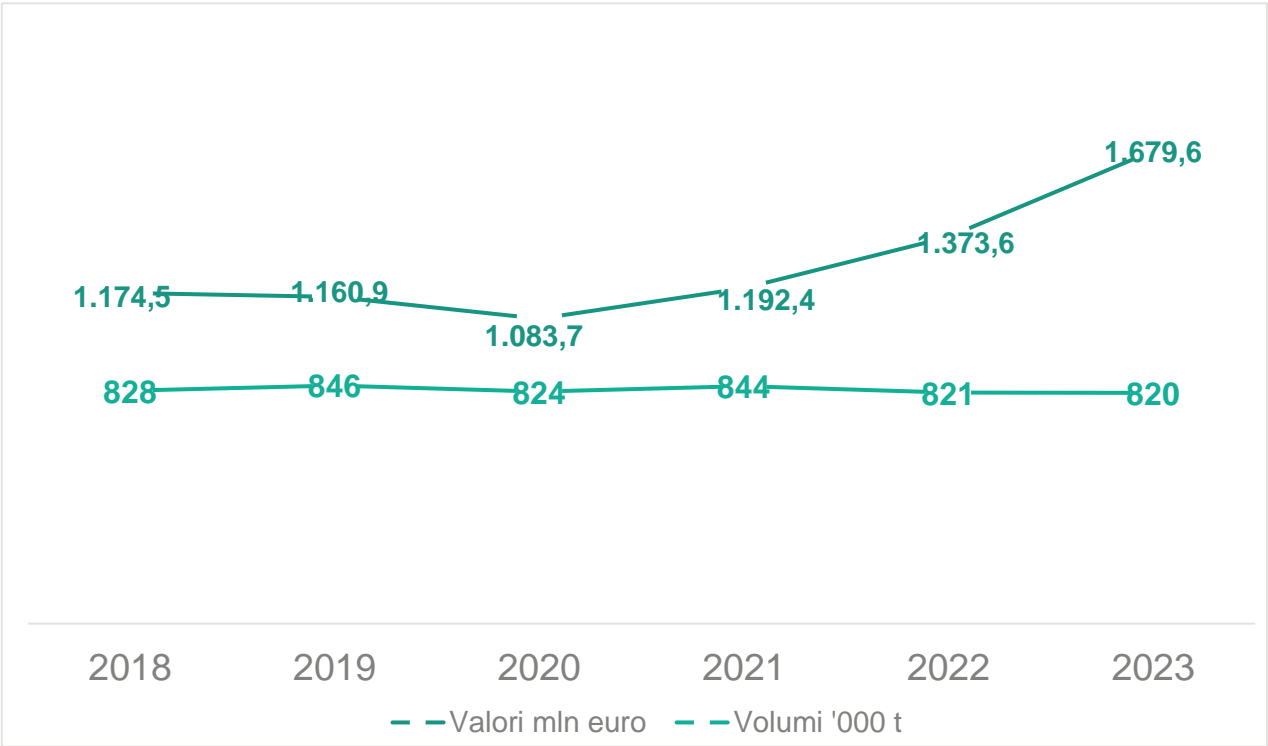
Five-year variation:

- in value (2018-2023): +7.4%T

Ten-year variation:

- in value (2013-2023): +3.4%

Evolution at current values and volume of production of pig farms in Lombardy: 2018-2023



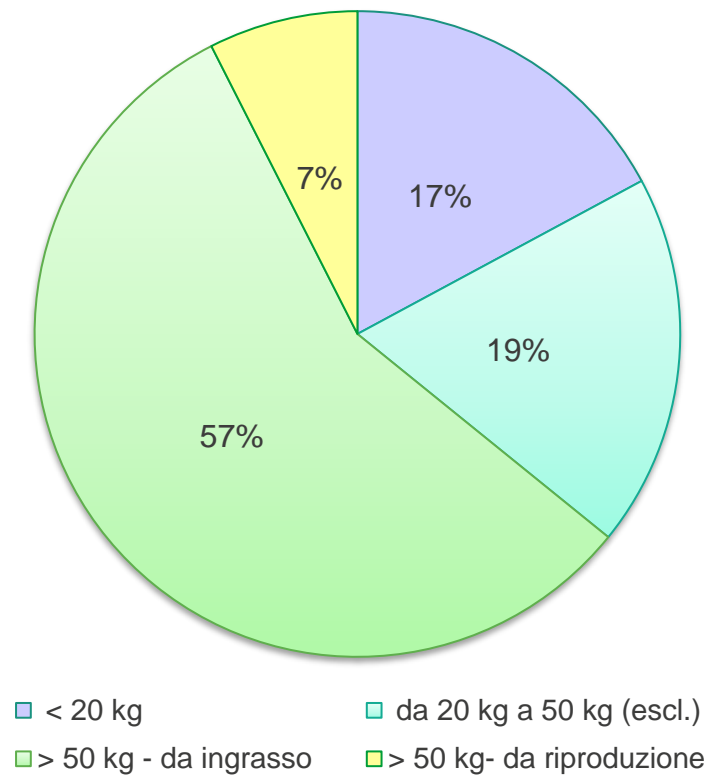
Source: SMEA Elaboration on Istat data.

Structure of pig farms in 2023

Distribution and quantity (year 2023)

- Fattening animals (>50 kg) are the largest group: 57% in Lombardy (50.9% at national level).
- Young animals (<20 and from 20 to 50 kg) represent 36%, breeding animals represent approximately 7%.

Composition of the pig herd by weight category in Lombardy - 2023 heads



Source: SMEA Elaboration on Istat data.

The structure of pig farm

Changes in pig herd size in Lombardy and Italy on 1st December (.000 heads)

Trends and changes:

- Increase in pig numbers in 2023: +3.6% in Lombardy (compared to +4.9% nationally).
- Increase in fattening animals (>50 kg): +7.9% in Lombardy, +5.8% in Italy → consolidation of farms.
- Reduction in breeding stock: males -9.6%, females -15.7%.
- Reduction in piglets: -7.2%, signaling a possible future contraction of the herd.
- Average annual growth (2013-2023): +1.24% in Lombardy, +0.7% in Italy.

	Var. % 2023/2022		Var. % media 2018-2023		Var. % media 2013-2023	
	Lombardia	Italia	Lombardia	Italia	Lombardia	Italia
Suini						
< 20 kg	-7,2	-0,5	3,6	3,6	0,5	1,5
da 20 kg a 50 kg (escl.)	11,5	13,2	2,5	1,8	2,0	1,3
> 50 kg	4,5	4,1	3,3	1,4	1,5	0,5
- da ingrasso	7,9	5,8	2,7	0,7	1,3	0,2
- da riprod.: verri	-9,6	-4,0	-1,9	0,2	-6,3	-3,4
- da riprod.: scrofe	15,7	-5,7	8,7	7,3	3,1	3,0
Totale Suini	3,65	4,9	2,85	1,6	1,24	0,7

Source: SMEA Elaboration on Istat data.

Territorial composition of farms in Lombardy in 2023

Number of farms and pigs by category and province in Lombardy as of 31 December 2023

- Brescia, Mantua and Cremona concentrate 76% of the pigs and have a higher density of farms per km².
- They host 58% of the farms, with an average size greater than the region. Lombardy: 1,524 heads per farm, but in the pig triangle it rises to 1,986 heads (Cremona: 2,568).

		Di cui:									Densità
Province	Allevame nti	Capi	Capi per								capi suini/Km q
	Suinicoli Totali (num.)	totali	allevame nto	Grassi	Magroni	Magronc elli	Lattonzoli	Scrofe	Scrofette	Verri	
Bergamo	338	323.336	957	22,60%	22,50%	20,10%	26,30%	6,60%	1,90%	0,10%	117,4
Brescia	741	1.115.494	1505	29,70%	23,90%	20,20%	19,00%	5,90%	1,20%	0,10%	233,1
Como	48	1.174	24	44,60%	40,80%	1,80%	6,60%	4,60%	0,70%	0,90%	0,9
Cremona	337	865.532	2568	31,10%	21,80%	18,90%	21,80%	5,20%	1,10%	0,00%	488,9
Lecco	65	724	11	62,60%	14,80%	13,00%	1,70%	5,50%	1,20%	1,20%	0,9
Lodi	165	358.251	2171	30,90%	27,60%	19,40%	16,10%	5,10%	0,80%	0,00%	457,5
Monza Brianza	22	1.865	85	34,20%	26,80%	15,50%	17,10%	3,70%	2,30%	0,50%	4,6
Milano	107	63.961	598	30,50%	26,90%	9,60%	24,40%	7,10%	1,40%	0,10%	40,6
Mantova	438	1.029.267	2350	27,30%	22,90%	17,90%	26,40%	4,50%	1,00%	0,00%	439,6
Pavia	198	182.394	921	38,20%	26,70%	15,90%	8,20%	8,90%	1,90%	0,10%	61,4
Sondrio	85	1.535	18	28,50%	56,30%	6,80%	5,20%	2,10%	0,50%	0,60%	0,5
Varese	45	257	6	20,20%	24,50%	20,60%	10,50%	16,30%	3,50%	4,30%	0,2
Lombardia	2.589	3.943.790	1.523	29,30%	23,60%	18,80%	21,40%	5,50%	1,20%	0,00%	165,3

Source: SMEA Elaboration on BDN data

Number of slaughterhouses in Lombardy

BDN data

In 2023, 523 slaughterhouses were active in Lombardy, of which 315 were authorized to slaughter pigs. Sharp decline in pig slaughterhouses: -63% compared to the previous year, with 540 closures, while the total number of slaughterhouses recorded a -56.78%

D.G. Welfare- U.O. Veterinary of the Lombardy Region:

reports a more modest reduction: -5.5% of pig slaughterhouses and -6.3% of total slaughterhouses.

Registered Slaughterhouses for Pigs and Total Authorized in Lombardy as of December 31st

Fonti:	BDN		D.G. Welfare – U.O. Veterinaria	
	Suini	Totale attivi	Suini	Totale attivi
2020	892	1243	316	288
2021	877	1240	313	284
2022	855	1210	307	285
2023	315	523	290	267
Var % 2023/2022	-63,16	-56,78	-5.5	-6.3

Source: SMEA Elaboration on BDN data and D.G. Welfare_U.O: Veterinary of Lombardy Region.

The discrepancies between sources are to be found in the structures detected, the DBN also includes small laboratories or slaughterhouses that have been most affected by the tightening of regulations.

The slaughterhouses

- In 2023, Lombardy slaughtered 31.6% of Italian pigs, a share that is down compared to previous years.
- For fat pigs (the most important for the supply chain), Lombardy's share of the national total is 32.5%, also decreasing.

Percentage of pigs of Italian origin slaughtered in Lombardy by category and % variations

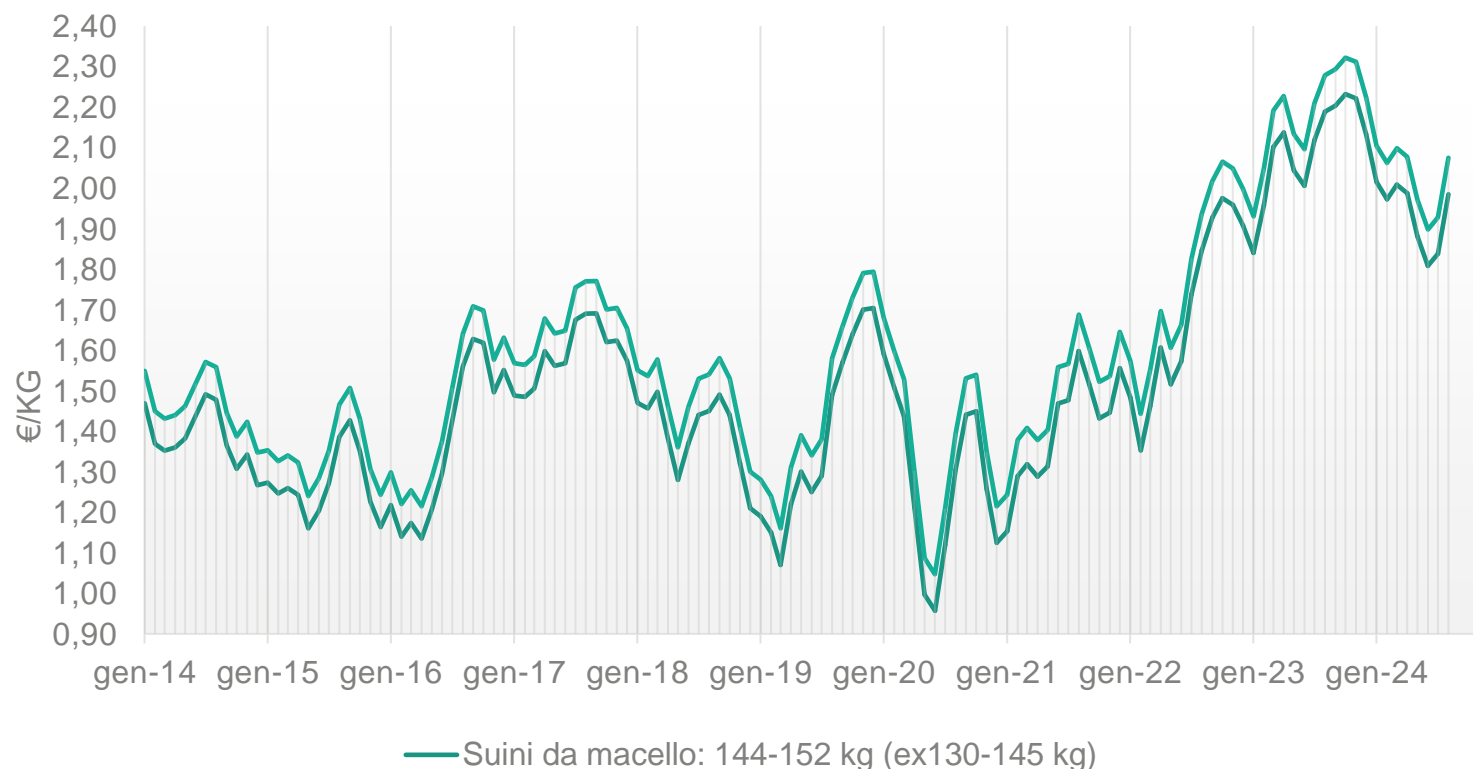
	2018	2021	2022	2023	Var.% 2023/20 22	Var.% media 2018- 2023	Var.% media 2013- 2023
	% Lombardia/Italia						
Grassi	39,2	37,4	35,5	32,5	-15	-6,3	-3,2
Lattonzoli e magroni	16,1	13,1	15,4	14,7	-11,9	-3,9	-5,4
Verri	39,5	30,7	36,4	37,7	-2,1	-0,8	0,3
Scrofe	53,3	47	51	55,5	-0,8	0,4	-0,8
Totale suini	37,9	35,9	34,4	31,6	-14,6	-6,1	-3,2

Source: SMEA Elaboration on BDN data

Prices of slaughtered pigs

The first nine months of 2023 saw an increase in prices reaching €2.29/kg in September 2023. 2024 saw initial fluctuations and a 7% drop in the first 8 months, then recovered in August and September.

Wholesale prices of slaughter pigs in Lombardy (euro/kg): January 2014 - September 2024



Source: SMEA Elaboration on data from the Chamber of Commerce of Mantua up to May 2018 and the CUN portal thereafter.

Pork prices

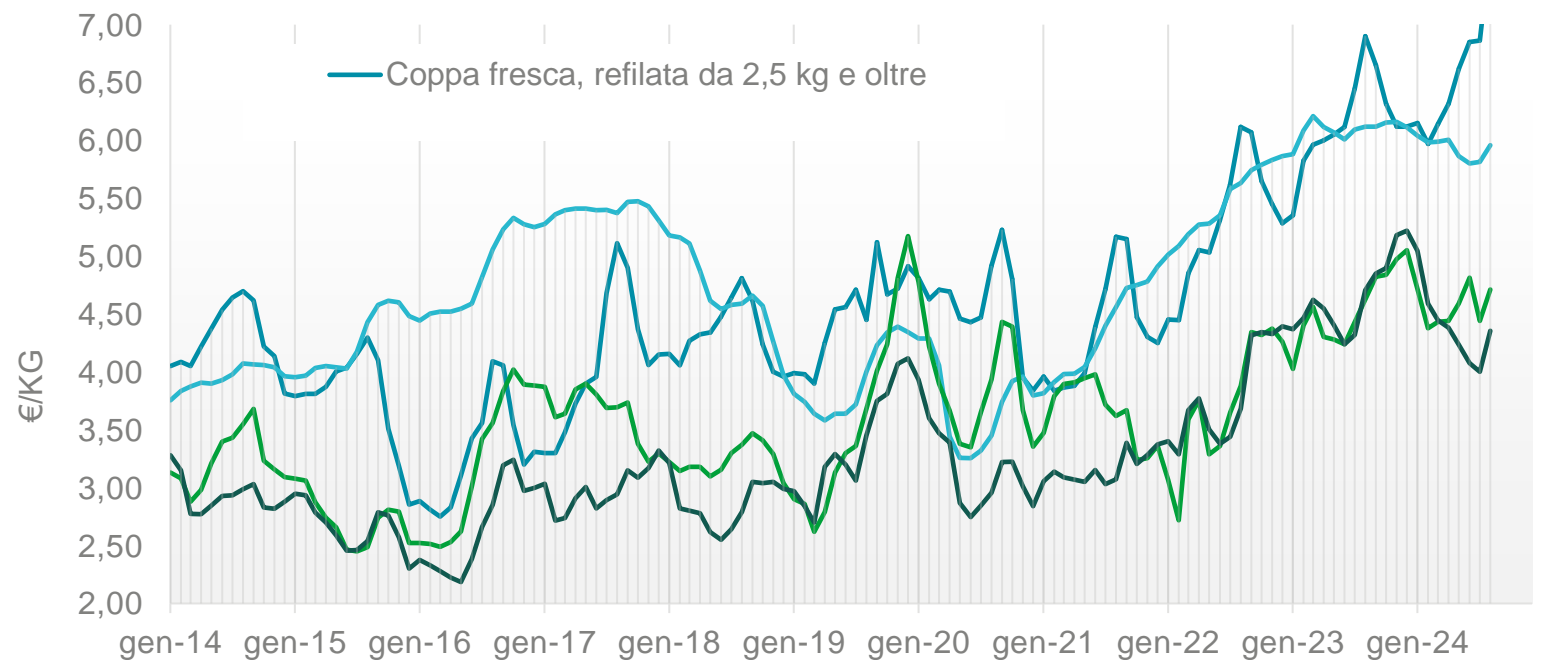
Raw legs

- Continuous growth since 2020:
- From €3.80/kg (December 2020) to €6.12/kg (December 2023), with a growth of 29% in 2021, 19% in 2022 and 4.4% in 2023.
- **In the first 9 months of 2024, initial drop then recovered to parity.**

Boneless shoulders

- Price collapse in 2020: €2.84/kg (-31% compared to 2019).
- Gradual recovery in the following years up to €5.22/kg (December 2023, +19.5% annually).
- **In 2024**, 23% drop until July, then recovery (+4% in September compared to December 2023).

Wholesale prices of some fresh pork cuts in Lombardy (euro/kg): January 2014 - September 2024



Source: SMEA Elaboration on data from the Chamber of Commerce of Mantua up to May 2018 and the CUN portal thereafter.

02

FOOD INDUSTRY

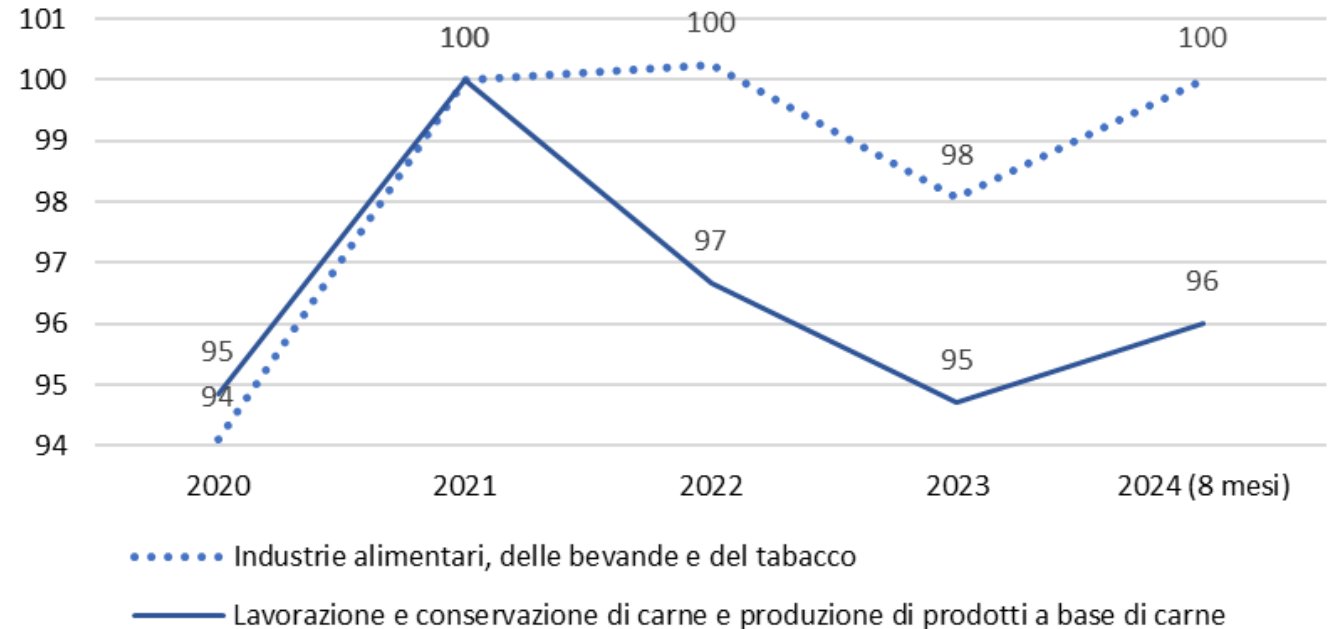
**Structural characteristics and performance of the
meat processing industry**

Meat processing industry

Economic dimension

- The production index for the meat processing industry in 2023 highlights a reduction of 2.03% in production, compared to 2022, reaching a value of 95 (base 2021=100, Istat data). Similar trend is noted for the previous year, but the trend changes in the first 8 months of 2024.
- The production index for the food, beverage and tobacco industry highlights a similar reduction in 2023 (-2.2%), reaching a value of 98 (base 2021=100, Istat data).

The average annual index of industrial production



Source: ESP elaboration, Istat data.

Meat processing industry

Structural characteristics and performance

In 2023, in Lombardy, there are 742 companies belonging to the meat processing and preservation and production of meat-based products industry that are registered in the appropriate register of chambers of commerce; 586 are active, constituting 10.4% of the companies active in the Lombard food industry

Companies in the food and beverage industry in Lombardy by category of economic activity in 2023

	Lombardia			
	registrate	%	attive	%
10: Industrie alimentari	6.503	100	5.613	100,0
101: Lav. e cons. carne e prod. prodotti a base di carne	742	11,4	586	10,4
102: Lav. e cons. pesce, crostacei e molluschi	33	0,5	27	0,5
103: Lav. e cons. frutta e ortaggi	133	2,0	117	2,1
104: Prod. oli e grassi vegetali e animali	59	0,9	49	0,9
105: Industria lattiero-casearia	380	5,8	322	5,7
106: Lav. granaglie, produzione di amidi e di prodotti amidacei	155	2,4	125	2,2
107: Prod. prodotti da forno e farinacei	4.118	63,3	3.640	64,8
108: Prod. altri prodotti alimentari	762	11,7	643	11,5
109: Prod. prodotti per l'alimentazione degli animali	121	1,9	104	1,9
11: Industria delle bevande	380	100,0	322	100,0
1101: Distillazione, rettifica e miscelatura degli alcolici	80	21,1	67	20,8
1102: Prod. vini da uve	112	29,5	90	28,0
1103: Prod. sidro e altri vini a base di frutta	2	0,5	2	0,6
1104: Prod. altre bevande fermentate non distillate	11	2,9	10	3,1
1105: Prod. birra	123	32,4	109	33,9
1106: Prod. malto	0	0,0	0	0,0
1107: Industria bibite analcoliche, acque minerali, altre acque	52	13,7	44	13,7
Totale alimentare e bevande	6.883		5.935	

Source: ESP elaboration, InfoCamere-Movimprese data.

Meat processing industry

Structural characteristics and performance

Territorila distribution of local units in 2023

- Taking into consideration the local units of the companies, in Lombardy 957 local units are revealed in the meat processing industry in 2023.
- The local units of the meat processing companies are mainly located in the provinces of Milan, Brescia, Mantua, Cremona and Bergamo, where meat farms and cured meat supply chains are mainly located.

	Va	Co	So	Mi	Bg	Bs	Pv	Cr	Mn	Lc	Lo	Mb	Tot.
	dati assoluti												
10: Industrie alimentari	466	384	281	2.442	813	1.139	522	462	594	282	186	496	8.067
101: Lav. e cons. carne e prod. prodotti a base di carne	28	38	66	164	92	141	73	107	130	50	26	42	957
102: Lav. e cons. pesce, crostacei e molluschi	8	6	2	17	1	15	-	-	-	4	5	2	60
103: Lav. e cons. frutta e ortaggi	7	2	12	61	32	40	18	11	20	8	6	7	224
104: Prod. oli e grassi vegetali e animali	4	6	1	27	2	19	2	10	2	1	2	3	79
105: Industria lattiero-casearia	23	33	39	131	62	97	20	50	77	26	22	19	599
106: Lav. granaglie, produzione di amidi e di prodotti amidacei	9	5	5	32	14	28	43	22	31	7	5	8	209
107: Prod. prodotti da forno e farinacei	303	240	122	1.539	517	653	295	171	260	147	88	295	4.630
108: Prod. altri prodotti alimentari	77	50	32	442	73	103	62	67	48	32	27	117	1.130
109: Prod. prodotti per l'alimentazione degli animali	7	4	2	29	20	43	9	24	26	7	5	3	179
11: Industria delle bevande	31	23	47	153	75	111	61	16	12	23	6	33	591
1101: Distillazione, rettifica e miscelatura degli alcolici	16	3	7	37	8	19	11	2	-	6	-	5	114
1102: Prod. vini da uve	2	2	23	35	15	46	35	8	8	6	1	3	184
1103: Prod. sidro e altri vini a base di frutta	-	-	-	2	-	-	-	-	-	-	-	1	3
1104: Prod. altre bevande fermentate non distillate	0	1	1	9	1	4	1	2	0	0	1	1	21
1105: Prod. birra	12	11	7	41	24	28	14	2	3	9	4	17	172
1106: Prod. malto	-	-	-	-	-	1	-	-	-	-	-	-	1
1107: Ind. bibite analcoliche, acque minerali, altre acque	1	6	9	29	27	13	-	2	1	2	-	6	96
Totale alimentare e bevande	497	407	328	2.595	888	1.250	583	478	606	305	192	529	8.658
Inc. % province su Lombardia	5,7	4,7	3,8	30,0	10,3	14,4	6,7	5,5	7,0	3,5	2,2	6,1	100,0

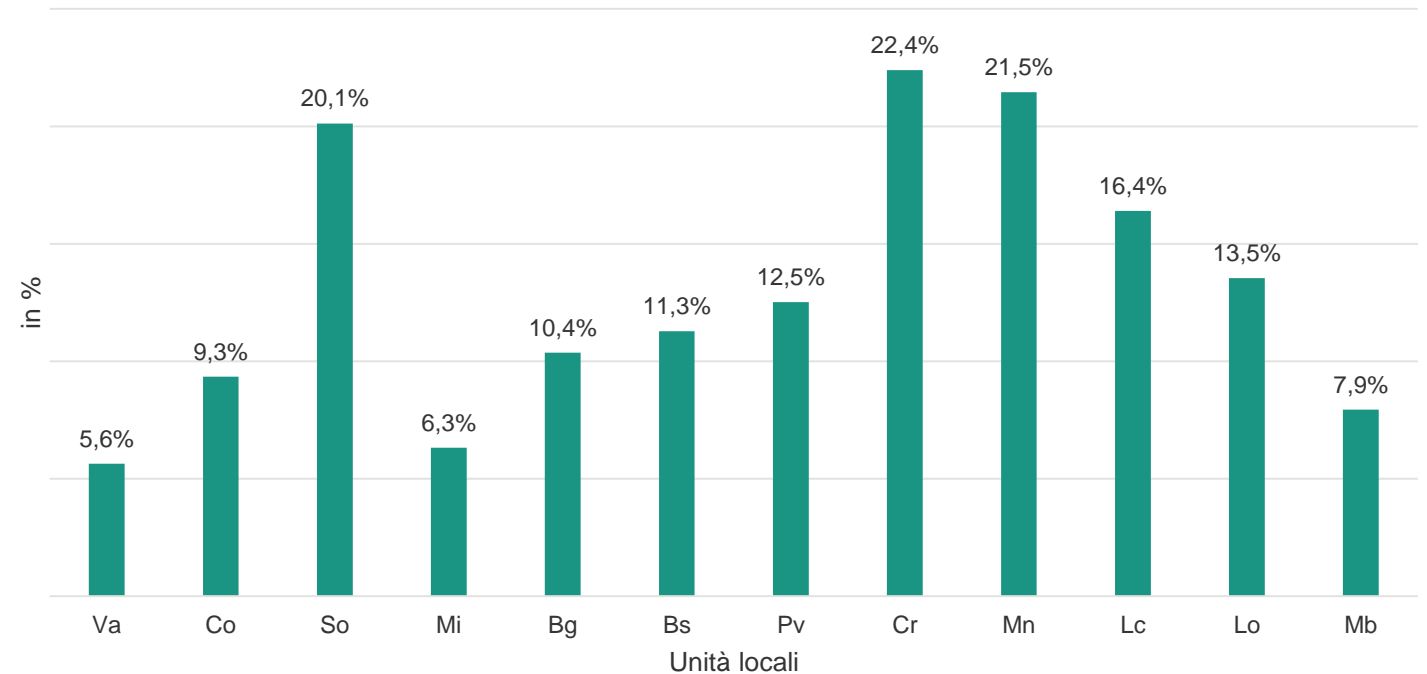
Source: ESP elaboration, InfoCamere-Movimprese data.

Meat processing industry

Structural characteristics and performance

- The graph displays the percentages of local units of companies of the meat processing industry out of the total number of local units in the food and beverage industry in each province of Lombardy in 2023, showing the specialisation of the provinces.
- The highest values are revealed in Cremona, Mantua, Sondrio, and Lecco, above 15%

Territorial distribution of local units
Meat processing industry



Source: ESP elaboration, InfoCamere-Movimprese data.

Meat processing industry

Main companies in Lombardy

- Among the largest 15 food companies in Lombardy, Giuseppe Citterio Salumificio (Giuseppe Citterio Group) is the main company whose activity is focused on meat processing and cured meats.
- The company shows a turnover of 335 million euros in 2023, with a growth of 5.3 percent compared to 2022, but a decrease in employment is noted (-5.4 percent).

Main Food Companies in Lombardy

	Fatturato (milioni €)		Var. % 2023/ 2022	Occupati		Var. % 2023/ 2022	Prov.	Attività prevalente
	2023	2022		2023	2022			
1 Coca Cola Hbc Italia Srl	1.274	1.148	11,0	2.019	1.886	7,1	MI	bevande analcoliche
2 Egidio Galbani Spa (Gruppo Lactalis Italia)	1.124	1.074	4,7	1.439	1.465	-1,8	MI	lattiero-caseario
3 Nestlè Italiana (gruppo Nestlè Italiana)	972	904	7,5	2.005	2.156	-7,0	MI	dolciario
4 Mondelez Italia (gruppo Kraft Foods Italia Intel. Prop.)	966	839	15,1	263	273	-3,7	MI	lattiero-caseario
5 Bolton Food	950	942	0,8	780	821	-5,0	MI	conservenze ittiche
6 BIG Srl (Gruppo Lactalis Italia)	904	857	5,5	807	819	-1,5	MI	lattiero-caseario
7 Heineken Italia Spa	827	753	9,8	1.030	1.065	-3,3	MI	birra
8 Lindt & Sprungli (gruppo Lindt & Sprungli)	735	639	15,0	1.296	1.311	-1,1	VA	cioccolato
9 Zanetti (Gruppo Zanetti)	682	640	6,6	517	491	5,3	BG	lattiero-caseario
10 Sterilgarda Alimenti	529	464	14,0	405	364	11,3	MN	lattiero-caseario
11 Latteria Soresina (gruppo Latteria Soresina)	489	477	2,5	469	489	-4,1	CR	lattiero-caseario
12 Spreafico Francesco e F.lli *	346	333	3,9	284	276	2,9	MI	conservenze vegetali
13 San Carlo Gruppo Alimentare (gruppo SAN CARLO GRUPPO ALIMENTARE)	342	299	14,4	312	309	1,0	MI	snacks salati
14 Giuseppe Citterio Salumificio (gruppo GIUSEPPE CITTERIO)	335	318	5,3	370	391	-5,4	MI	salumi
15 Cameo (Gruppo Cameo)	238	222	7,2	355	341	4,1	BS	dolciario

*Bilancio chiuso a data diversa dal 31 Dicembre.

Source: ESP elaboration, Mediobanca data.

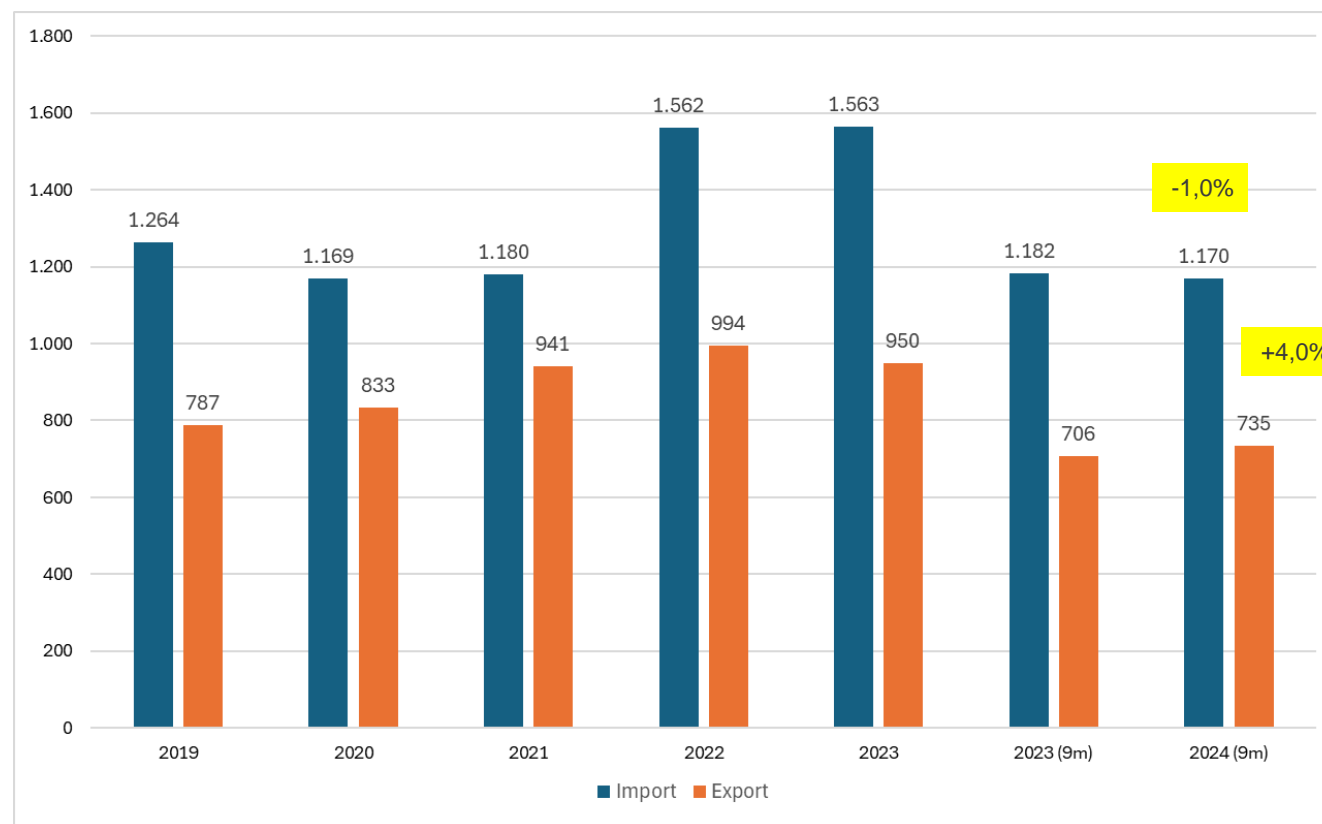
03

THE FOREIGN TRADE FOR PIG SECTOR IN LOMBARDY

The trade of meat and meat products in Lombardy

- The meat trade is extremely dynamic on both the import and export side. The balance is strongly negative (over €600 million in 2023), but most of the imports are destined for further processing and therefore feed the Lombardy processing industry
- In the two-year period 2022-23 there was a very strong growth in international trade (both imports and exports).

Trade in meat and meat products in Lombardy (€ million at current prices)

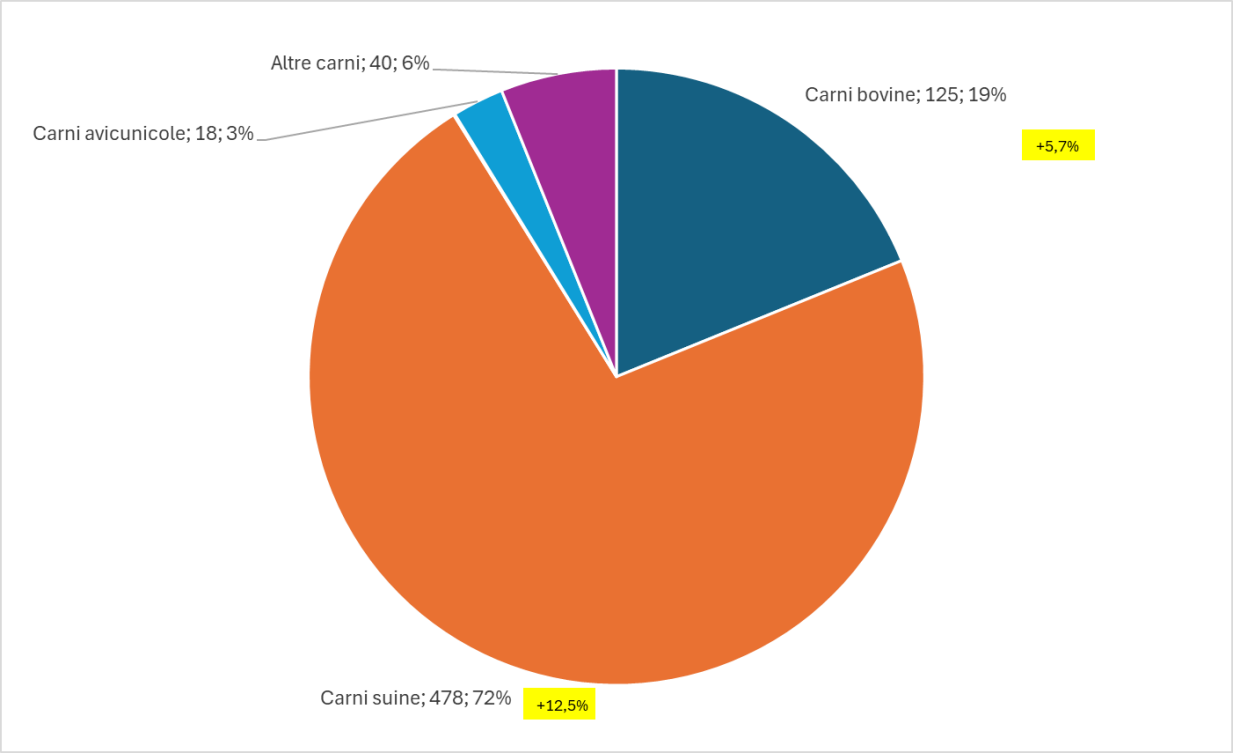


Source: SMEA Elaboration on Istat/SH6 Data

The trade of meat and meat products in Lombardy

Pork (and its processed products) is by far the most important component of meat exports. Globally, pork exports are worth over €630 million on an annual basis and almost €480 million in the first nine months of 2024.

Composition of meat EXPORTS in Lombardy (first 9 months 2024)

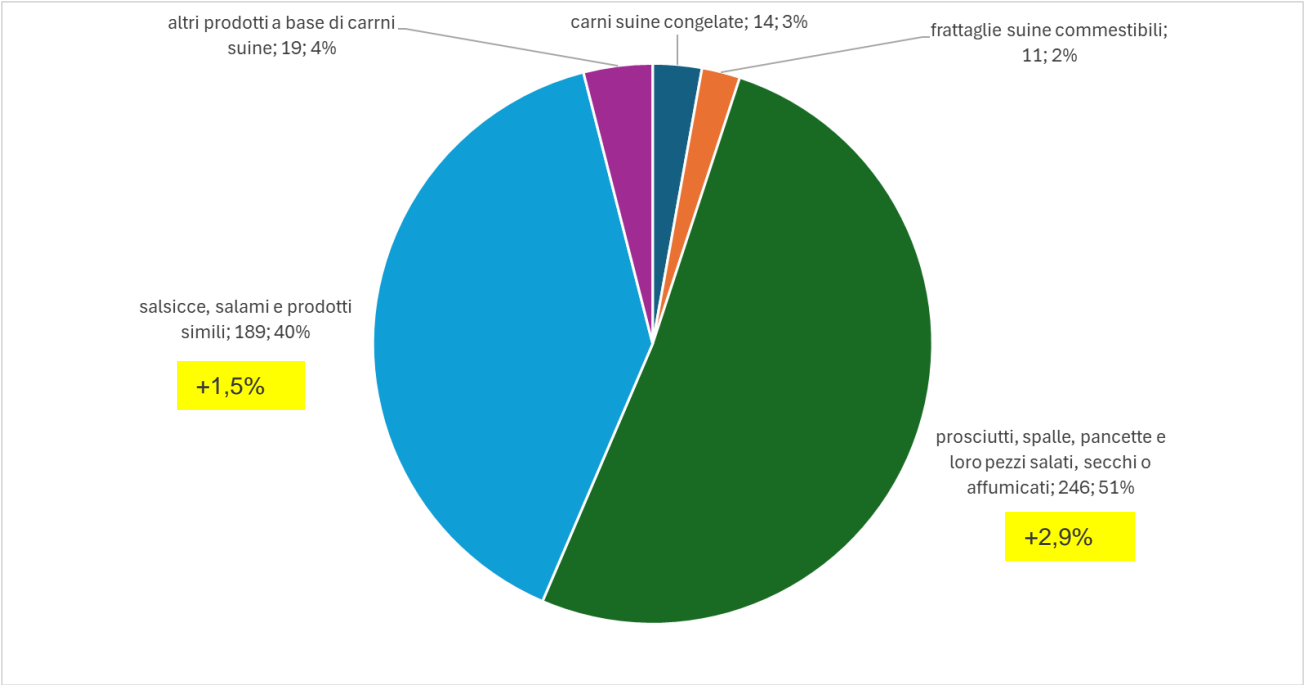


Source: SMEA Elaboration on Istat/SH6 Data

The pork Foreign trade in Lombardy

Charcuterie products and sausages are by far the most important products for the export of Lombard pork (over 90%).

Composition of pork EXPORTS to Lombardy (first 9 months of 2024)



Source: SMEA Elaboration on Istat/SH6 Data

Trading partners for the meat trade

Lombardy's trading partners are mainly European countries, with the conspicuous exception of the United States, which, in the case of pork, absorbs almost 12% of exports, with growth that, in 2023, was close to 13%.

The Lombardy trading partners

Import			Export		
	Var % in valore 2024/2023	Quota % su valore 2024		Var % in valore 2024/2023	Quota % su valore 2024
Carni bovine					
Paesi Bassi	-16,2	21,3	Paesi Bassi	-0,7	22,8
Polonia	-17,5	11,8	Germania	17,7	16,1
Francia	-0,2	11,2	Francia	-4,5	13,7
Brasile	a	a	Spagna	17,0	9,8
Spagna	-12,0	10,7	Svizzera	-2,7	6,1
Germania	3,0	10,1	Grecia	-26,6	5,8
Irlanda	-13,7	8,0	Romania	56,5	4,7
Belgio	2,6	3,8	Belgio	0,7	2,7
Carni suine					
Spagna	12,6	27,8	Germania	14,6	13,9
Germania	9,6	21,4	Regno Unito	8,9	13,8
Paesi Bassi	11,1	20,0	USA	12,9	11,7
Danimarca	1,0	12,3	Francia	4,0	9,8
Ungheria	33,6	4,4	Svizzera	7,8	9,8
Francia	65,8	4,0	Spagna	33,7	4,8
Polonia	6,0	3,4	Belgio	11,2	4,8
Austria	-10,1	3,4	Paesi Bassi	33,5	4,6

Source: SMEA Elaboration on Istat/SH6 Data

04

TYPICAL FOOD PRODUCT IN LOMBARDY

The weight of the Lombardy region in the national PDO-PGI market

- The share of PDO-PGI food productions obtained in Lombardy on the national figure grew during 2023 compared to the previous year, going from 22.6 to 22.7%. More than a fifth of the national geographical indication productions therefore comes from Lombardy.
- Meat products, therefore cured meats, including Bresaola della Valtellina PGI, are the second most important product aggregate: in 2023, regional production reached a share equal to 13% of the national total of cured meats, and 11.5% of the regional total of PDO-PGI.

% share of regional PDO-PGI turnover compared to the national figure

Comparto (DOP/IGP)	Quota % Lombardia/Italia		Quota % comparto su tot Regione	
	2022	2023	2022	2023
Formaggi	31,3%	32,0%	65,7%	68,6%
Prodotti a base di carne	14,9%	13,0%	13,5%	11,5%
Ortofrutticoli e cereali	3,6%	4,0%	0,6%	0,6%
Aceti balsamici	-	-	-	-
Paste alimentari *	-	-	-	-
Panetteria e pasticceria	-	-	-	-
Carni fresche	-	-	-	-
Olio di oliva	0,9%	0,8%	0,0%	0,0%
Altre categorie *	-	-	-	-
Vino	4,4%	4,5%	19,9%	19,2%
TOTALE alimentari	22,6%	22,7%	80,1%	80,8%
TOTALE alimentari e vino	12,4%	12,8%	100,0%	100,0%

Source: SMEA Elaboration on Certification Centre and Agea data

Meat intended to produce PDO meat product in Lombardy

- In 2023, a significant slowdown was observed in the supply chain of meat intended for the production of PDO and PGI cured meats in the Lombardy region. The quantity of meat intended for the two PDO salamis, Brianza and Varzi, increased from 22.1% in 2023, an important figure even if it refers to overall limited quantities (913 tonnes).
- The quantity of pork processed in the region for cured meats that can be produced both in Lombardy and in other territories, decreased by 12.6% compared to 2022, falling to 8,377 tonnes.
- Also in 2023, the quantity of beef destined for the production of Bresaola della Valtellina PGI (-2.5%) also decreased, falling below 34 thousand tons.
- The quantities of meat destined for Italian salami alla cacciatore (PDO) also decreased sharply (-14.8%) in 2023. The quantities of Coppa di Parma (+30.8%) and Salame di Cremona (+19.6%) are on the rise.

Meat processed to PDO in Lombardy (in tons)

	2021	2022	2023	Var % 23/22
A. DOP/IGP producibili solo in Lombardia				
<i>A.1 Salumi di carni suine</i>				
Salame Brianza DOP	258	236	277	17,7
Salame di Varzi DOP *	534	512	636	24,2
Totale	792	748	913	22,1
<i>A.2 Salumi di carni bovine</i>				
Bresaola della Valtellina IGP	38.208	34.765	33.894	-2,5
<i>A.3 Salumi di carne d'oca</i>				
Salame d'oca di Mortara IGP	n.d.	n.d.	n.d.	-
B. DOP/IGP di carne suina producibili anche in Lombardia				
<i>Produzione realizzata solo in Lombardia</i>				
Coppa di Parma IGP	392,4	199,2	260,5	30,8
Cotechino Modena IGP	312,1	115,0	125,3	9,0
Mortadella Bologna IGP	5.969,3	6.119,5	5.265,7	-14,0
Salame Cremona IGP	179,9	183,9	220,0	19,6
Salamini Italiani alla Cacciatora DOP	3.053,9	2.942,2	2.505,4	-14,8
Zampone Modena IGP	28,4	24,3	n.d.	-
Totale	9.936,0	9.584,1	8.376,9	-12,6

Source: SMEA Elaboration on Certification Centre and Agea data



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