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METTERE A



Regione  
Lombardia

# THE LOMBARDY AGRI-FOOD SYSTEM

May 2026

# 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.

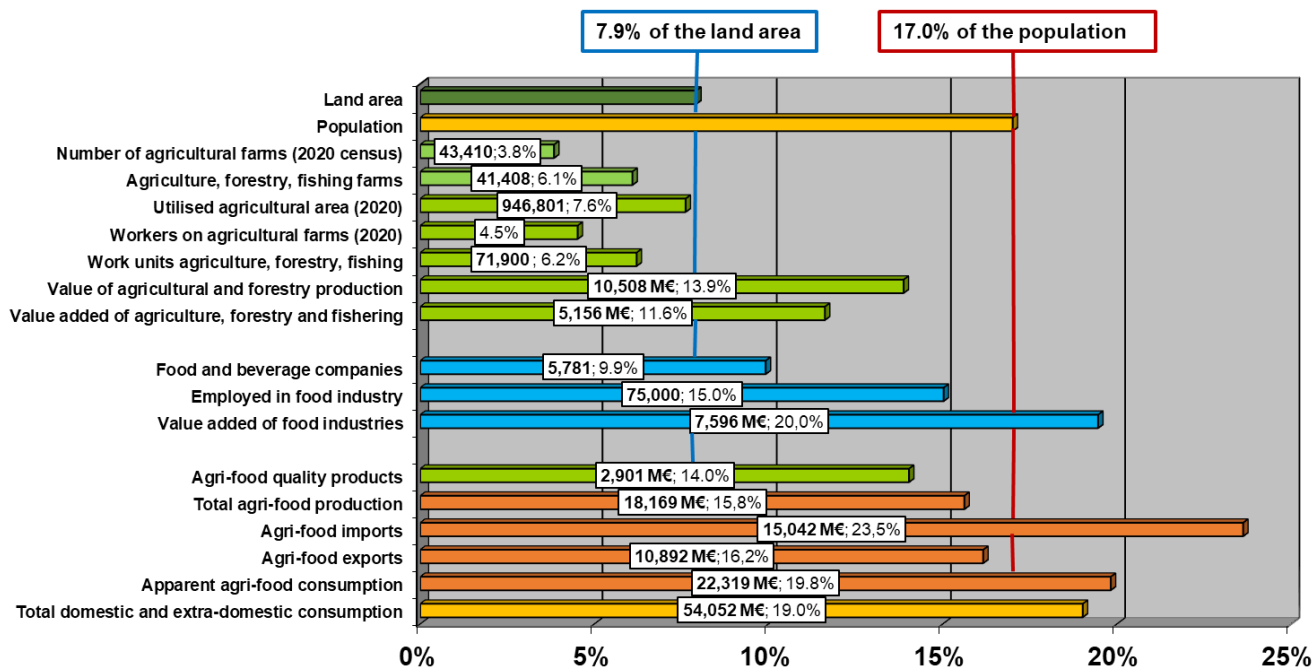
The value of agricultural production is almost 11 billion euros and the contribution to the GDP exceeds 5 billion.

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 54 billion, 8% higher per capita than the national average.

## Main data of the Lombard agri-food system in 2024

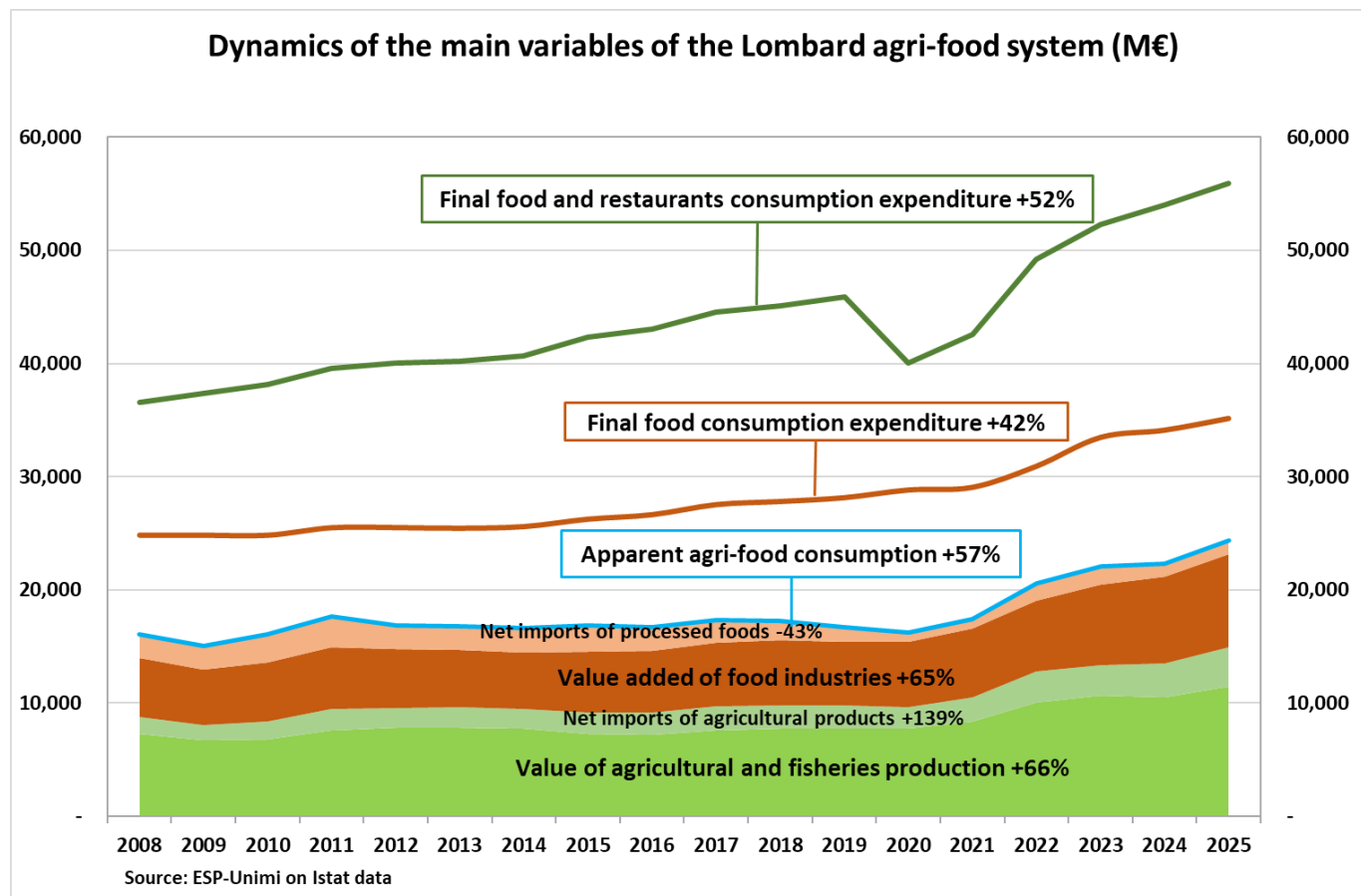


Source: ESP-Unimi on Istat data & Unioncamere

# 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 (+66%) and reducing the agri-food trade deficit (which rose by only 31%). Also between 2008 and 2025, apparent agri-food consumption grew in value by 57%, compared to a 35% growth in inflation, while final food consumption increased by 52%.

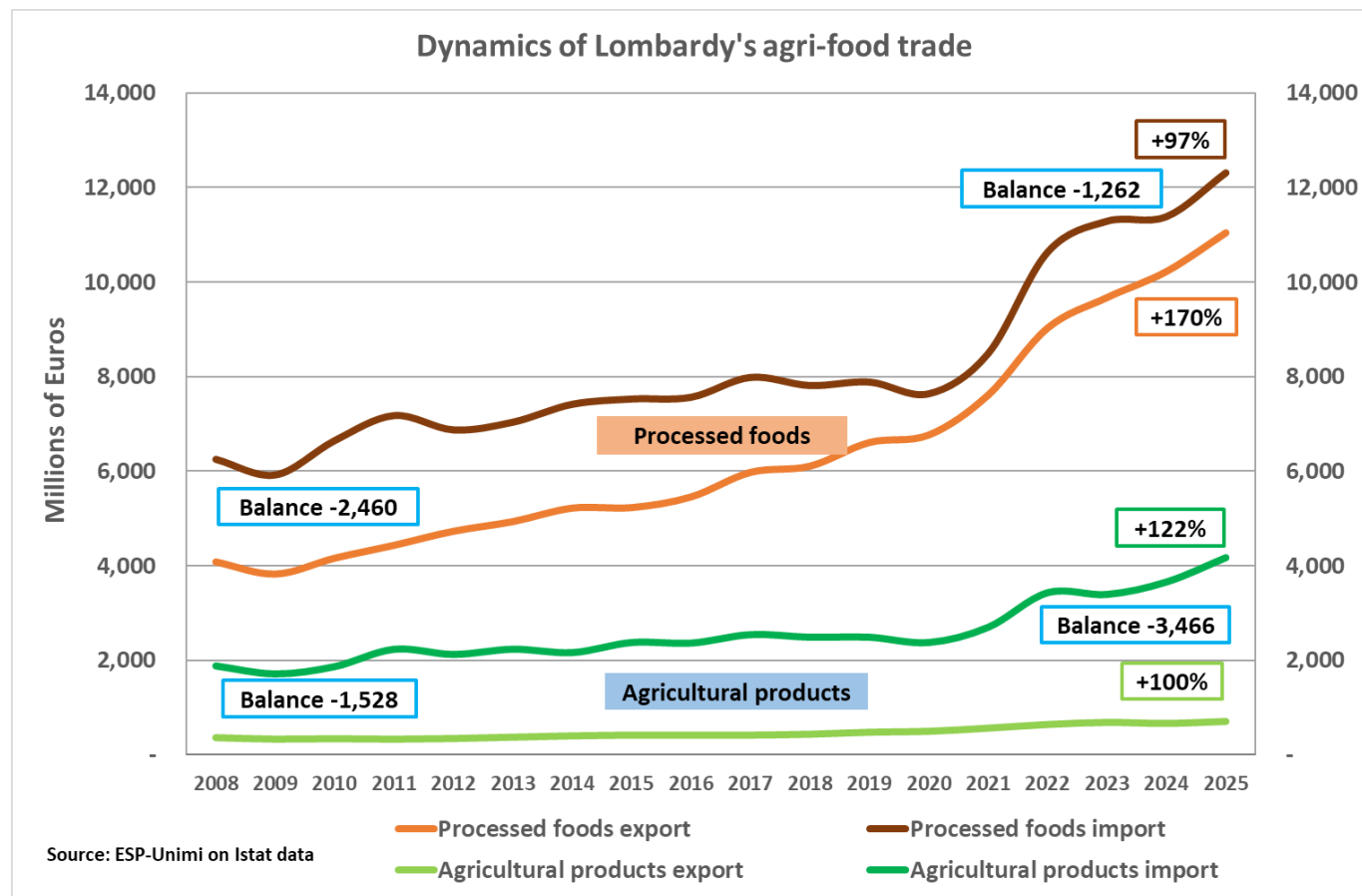
The quantitative growth in food consumption is due to the increase in out-of-home consumption (+77% between 2008 and 2025), which recovered strongly after the 2020-21 crisis caused by the pandemic. The greater growth in value of agricultural products compared to that of food goods is mainly due to prices (+58% versus +47%).



# 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 17 years, the global balance of goods has remained negative but has grown at a slower rate than domestic production. The deficit for agricultural products has more than doubled, while that for food has halved. The percentage increase in exports is greater than that of imports, both exceeding 100%.

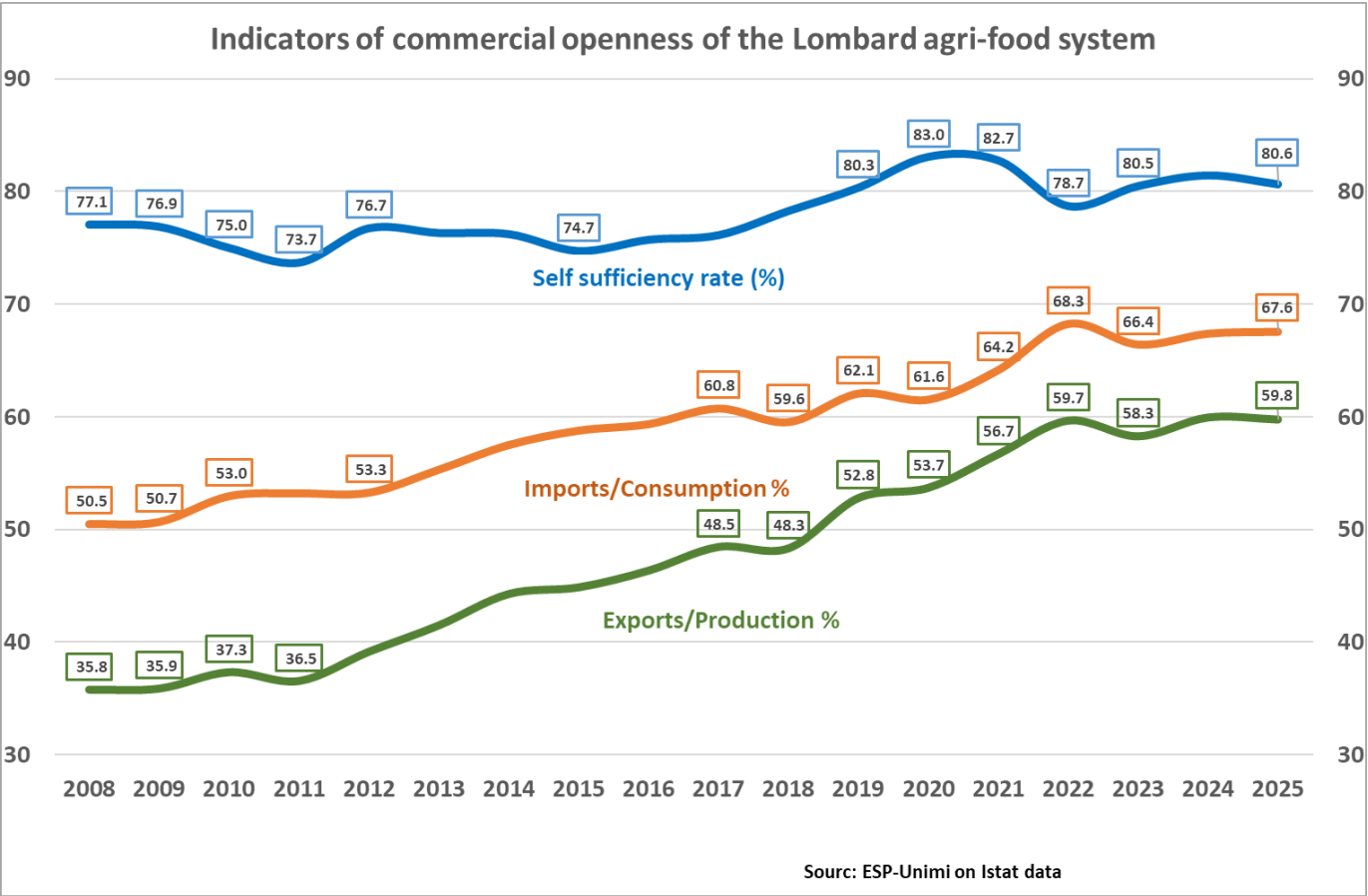


# With increasing trade openness

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.

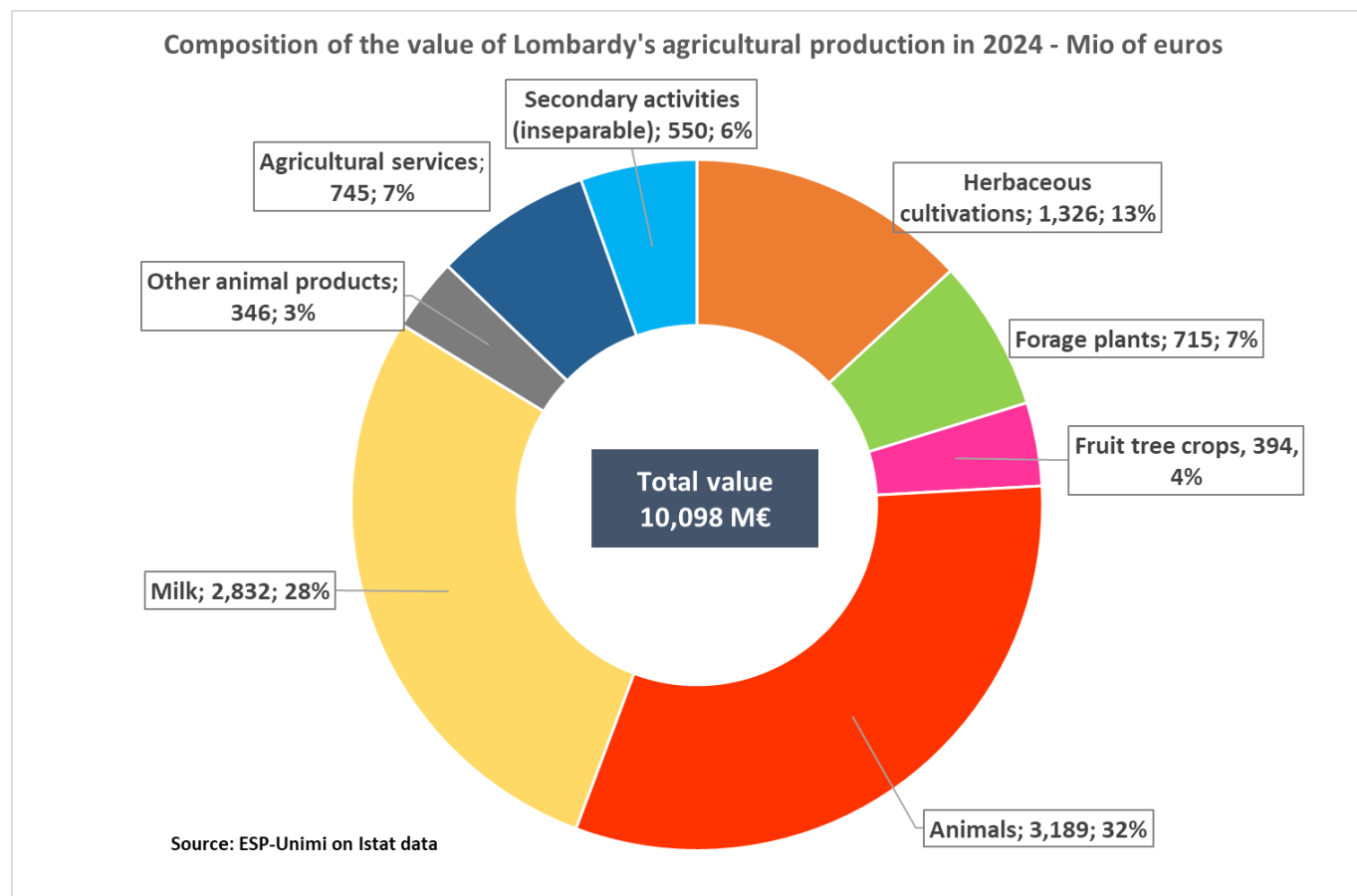
Exports have gone from 35% to 60% in relation to the value of regional production.



## The composition of Production at Basic Prices (PBP)

In Lombardy, 63% 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 (32%) while among the products, cow's milk is the most important.



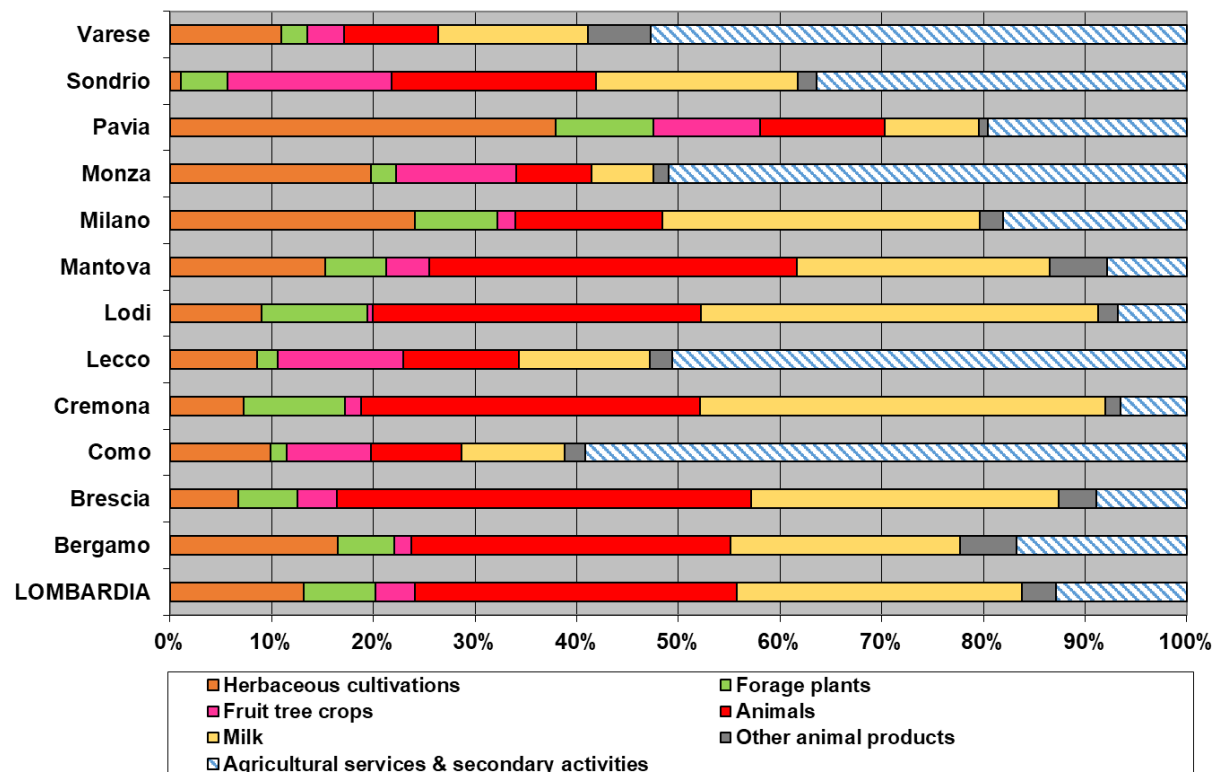
## Distribution of production value in the provinces of Lombardy (2024)

The provinces of Lombardy contribute differently to the regional value; in terms of sectors, 82% 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 82% 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 13% at the regional average level.

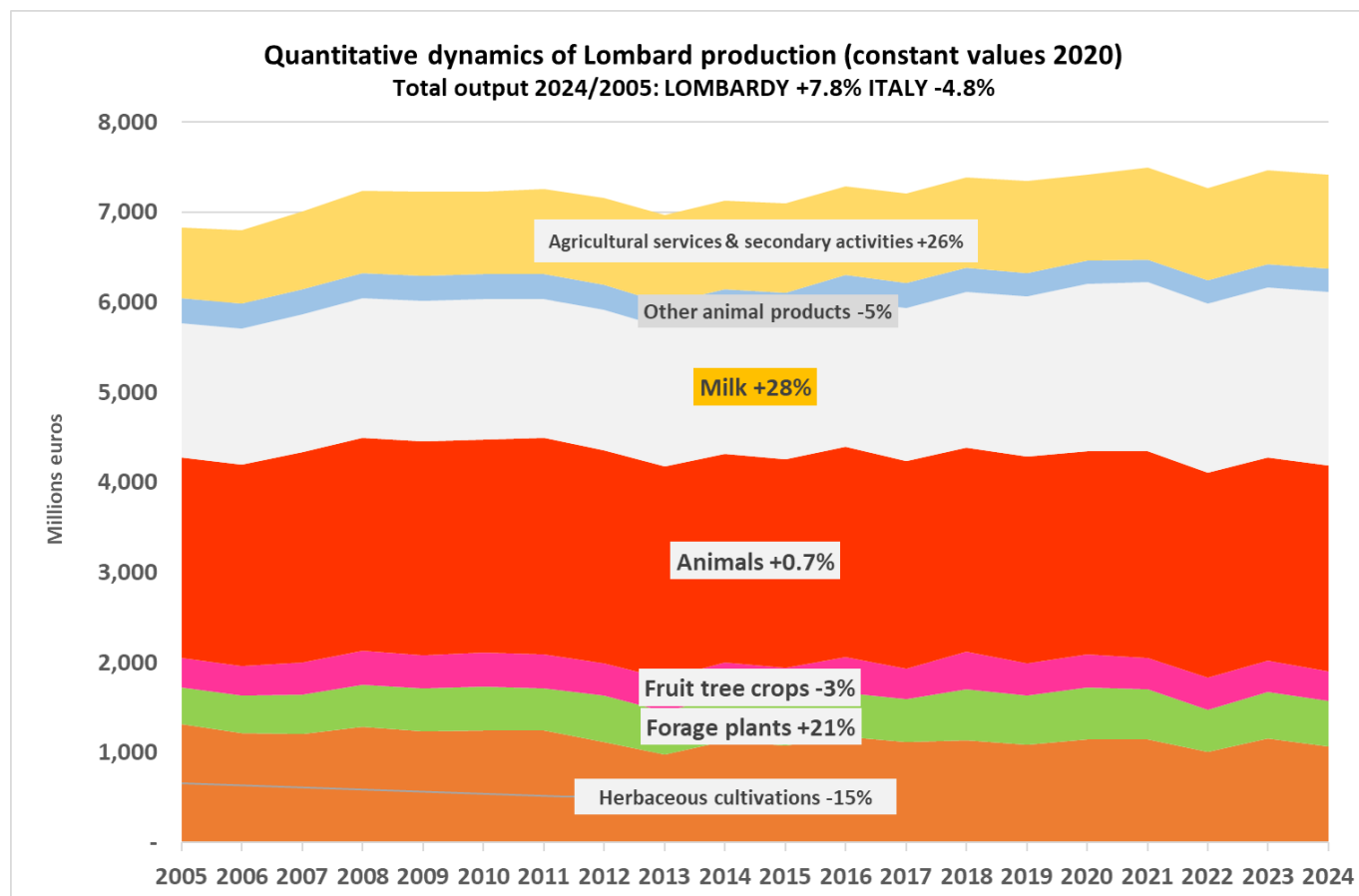


## Long-term production dynamics

Between the three-year period 2005-07 (following the CAP reform) and 2024, quantities in Lombardy grew by 7.8%, compared to a national decline of 4.8%.

Growth was modest for goods (+5%) and strong for services (+26%).

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

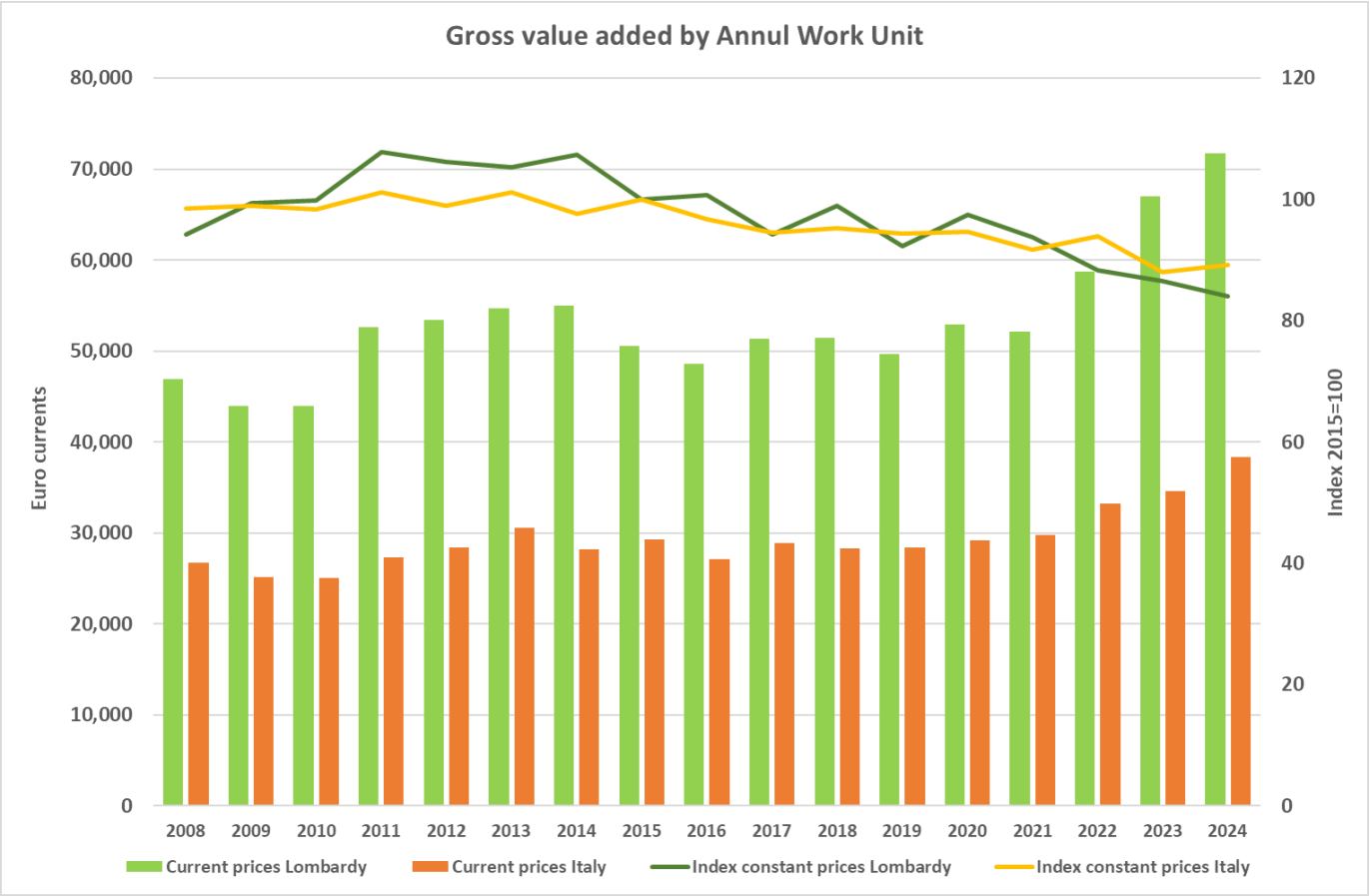




# Agricultural income dynamics

Calculating the Gross Value Added per Work Unit we observe that the absolute level at current prices in Lombardy is on average 80% 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

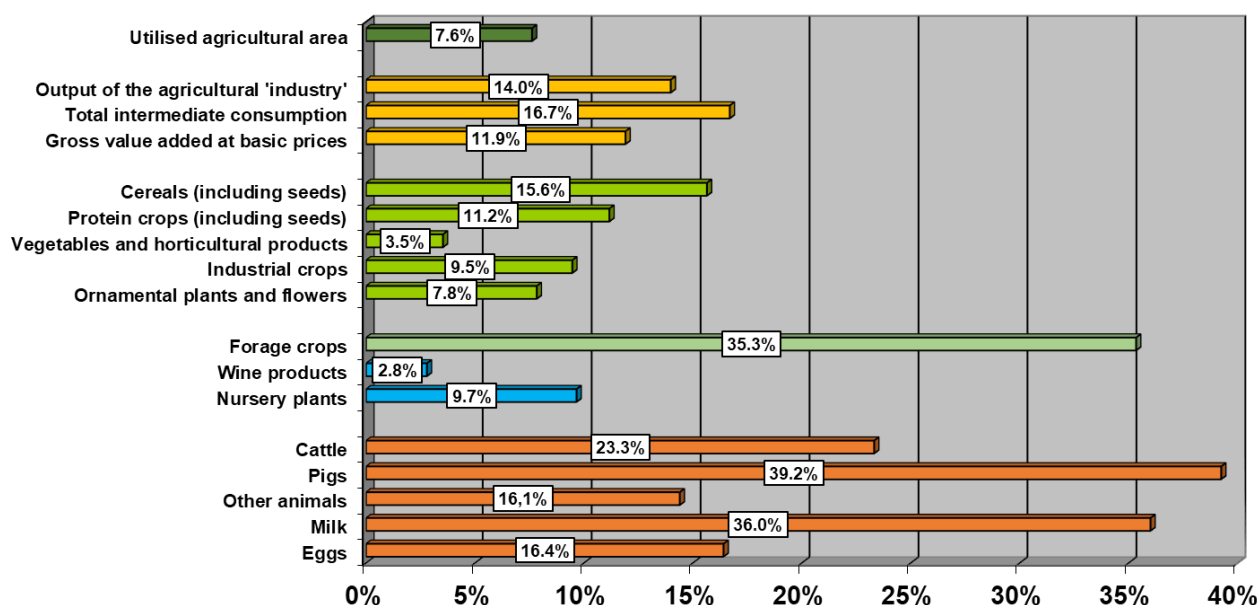
With a utilized surface area equal to 7.6% of the national one, Lombardy agriculture generates a production value almost double (14%). This is due on the one hand to a greater productivity of herbaceous crops, dependent on the large availability of irrigation water, and on the other to the significant 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).

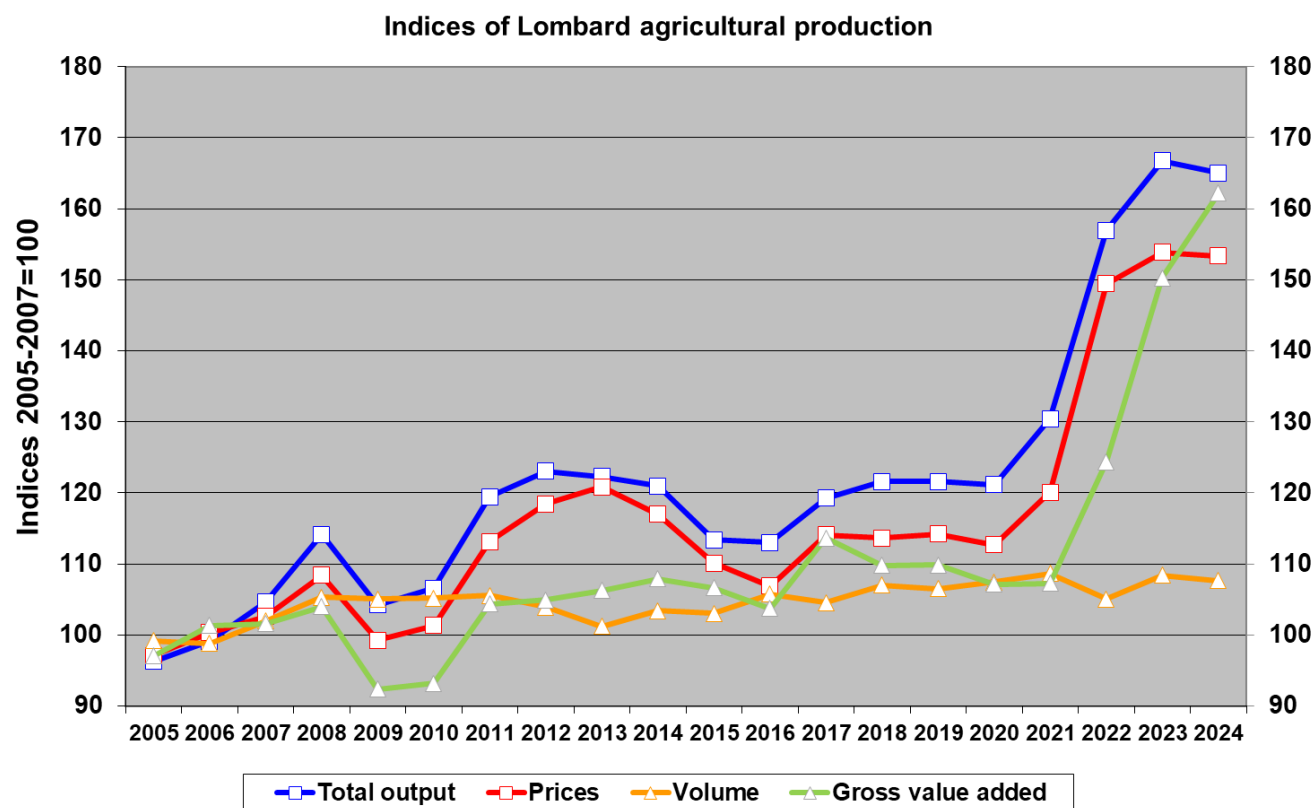
Share of Lombardy productions on Italy total



Source: ESP-Unimi on Istat data

## Long-term production dynamics

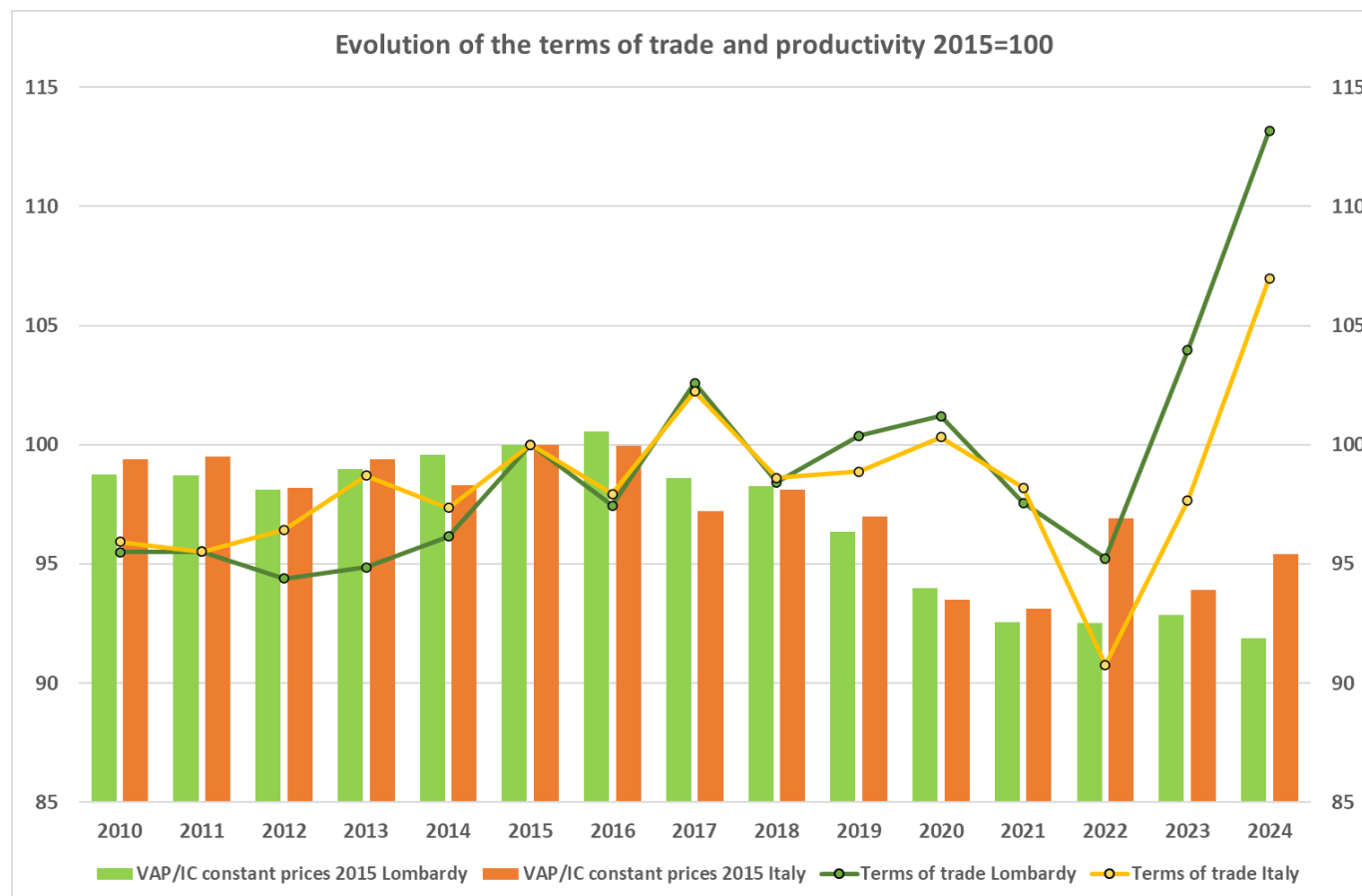
We can observe the progressive slight increase in quantities and the strong oscillation of prices; the process had peaks in 2008 and in the three-year period 2012-14, remained stable between 2017 and 2020 and have undergone a strong increase in the last three years (Covid and war in Ukraine). The variation 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 subsequent stabilization.

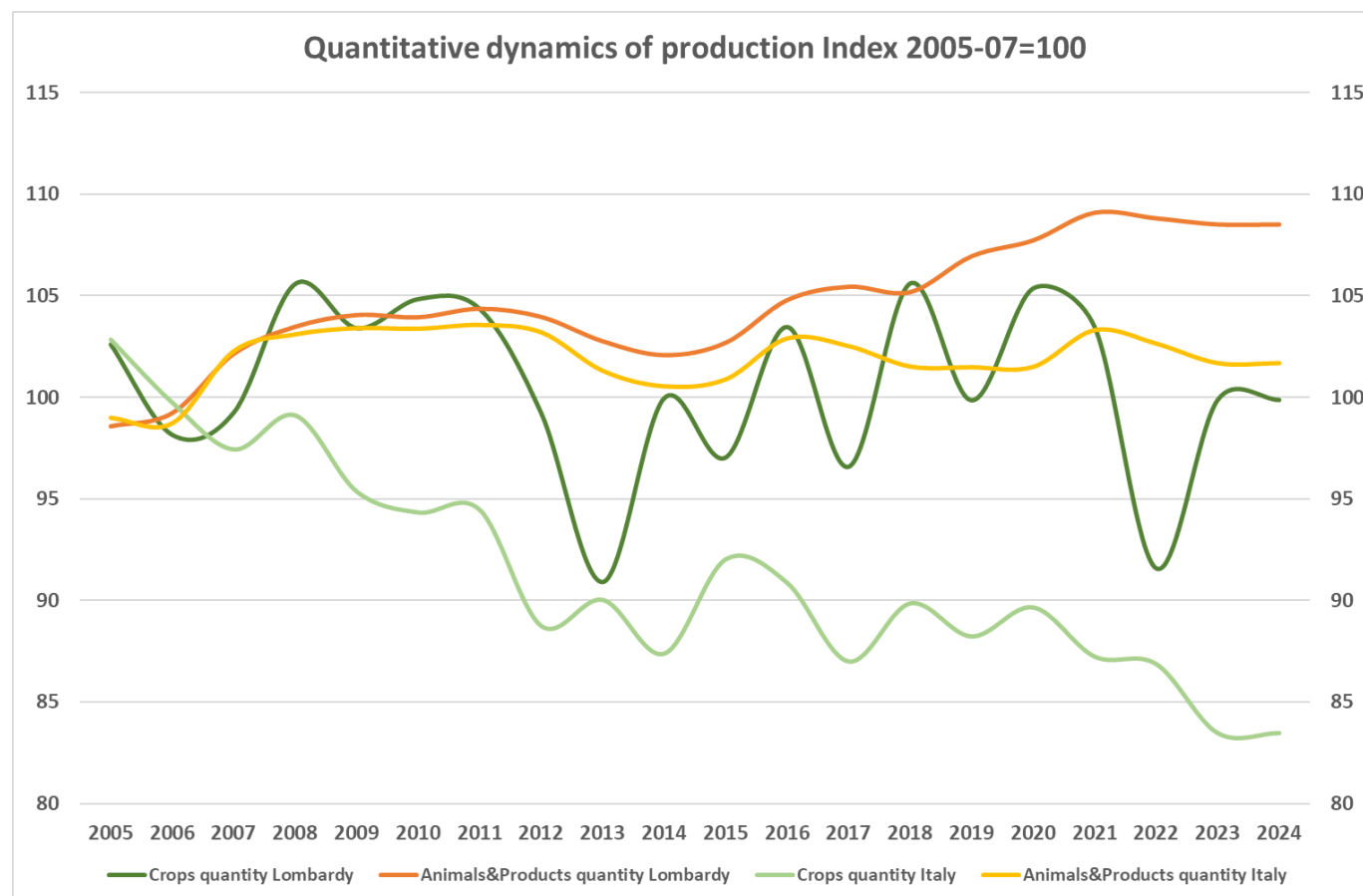
The terms of trade fluctuated sharply and, after the 2022 collapse, showed a sharp increase.



## 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.

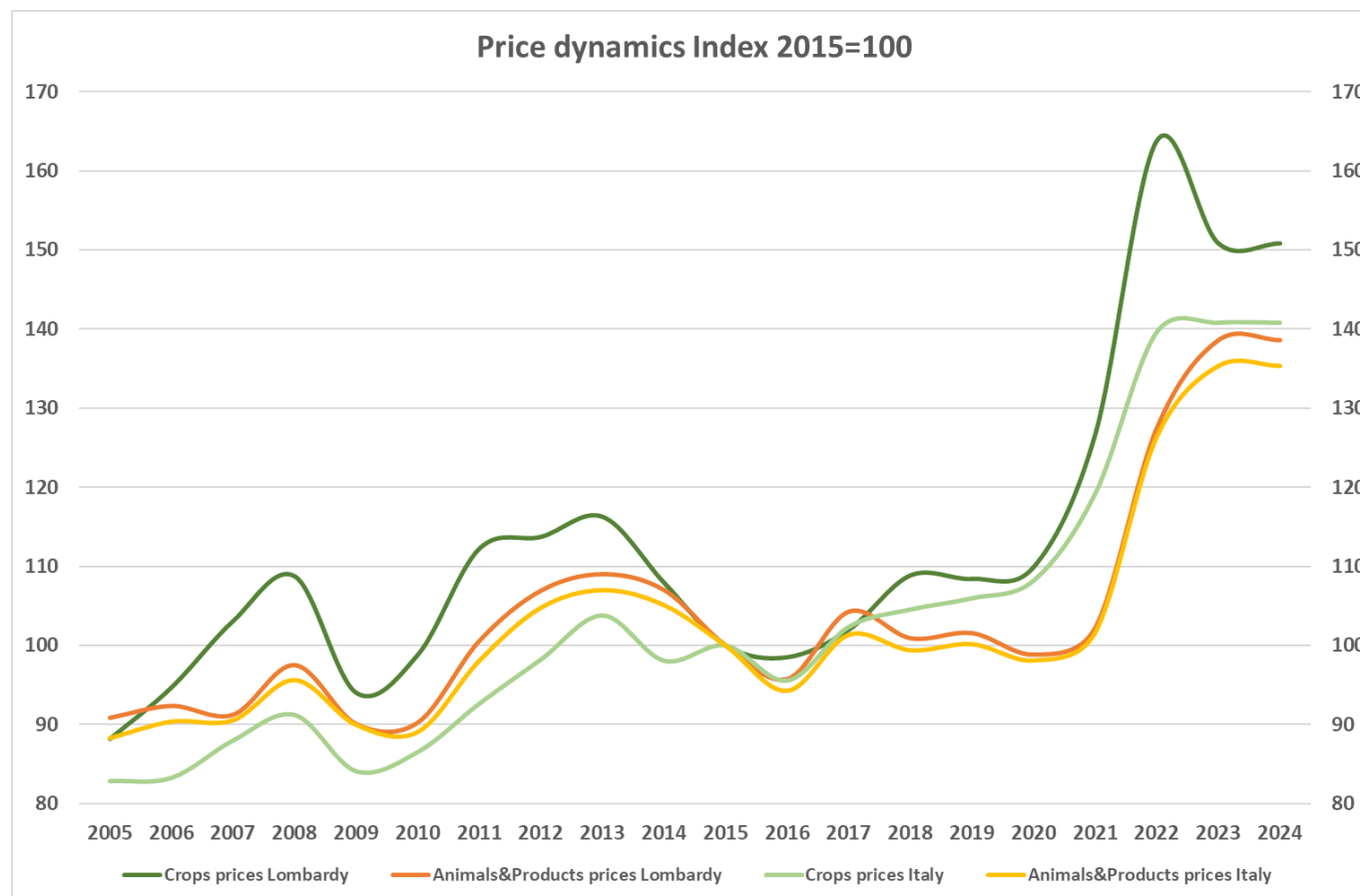


## Long-term dynamics: plant and animal prices

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

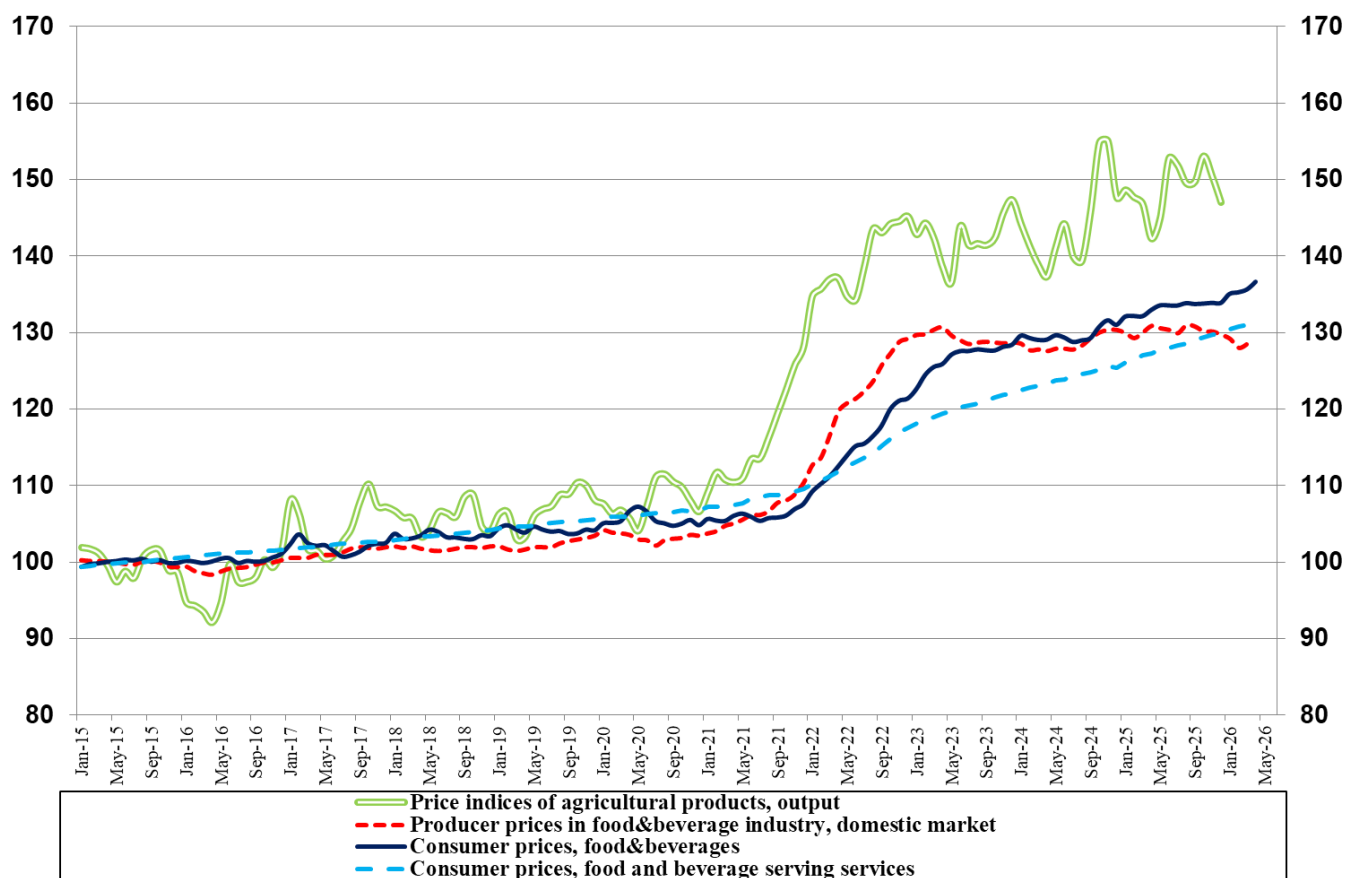
This results in an index with a base of 2015=100. While the price dynamics of livestock products appear similar in Lombardy and Italy, those of plant products show higher values in Lombardy.

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



## Long-term price dynamics in the agri-food system (2015=100)

Comparing the dynamics of the producer price index with those of producer prices and consumer prices (all reported on a 2015=100 basis and at the Italian level), a greater increase is observed for the prices of goods sold by farmers. The strong increases in 2021-22 were transmitted with a delay of about a year at the industrial level and of a further 5-6 months to consumption, albeit to a lesser extent.

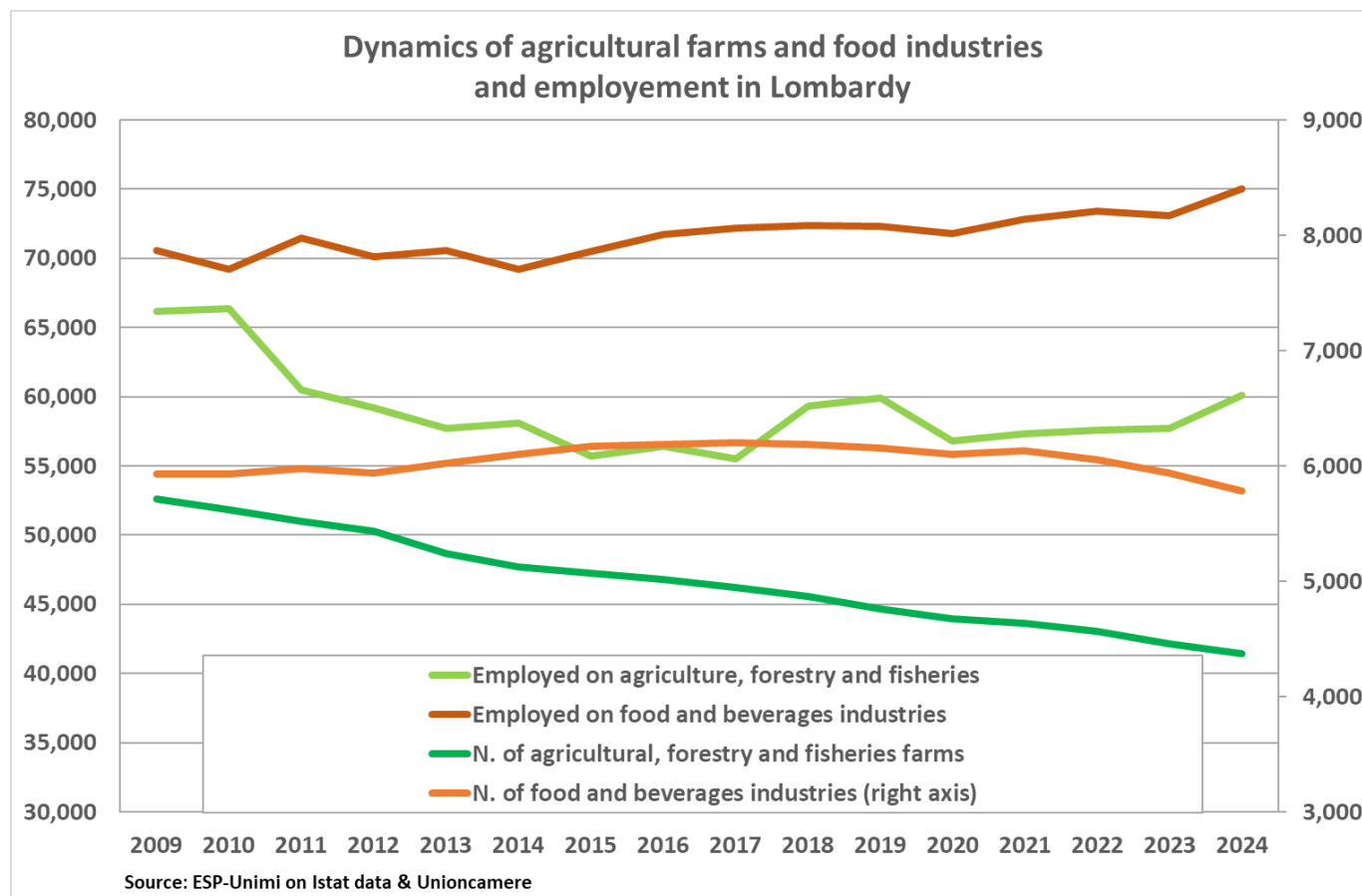


## The companies system

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 21% and employees by 9%, while companies in the food and beverage sectors have grown by approximately 5% between 2009 and 2017 and then decreased by 7% between 2017 and 2024.

Employees operating in the local units of the food industries in Lombardy, on the other hand, have grown by approximately 8% 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 (17% employees and 10% companies), dairy industry (13% employees and 5% companies), production of soft drinks and mineral waters (6% employees and 1% companies).

	<i>Active companies</i>	<i>Employees</i>	<i>% companies</i>	<i>% employees</i>
<b>10: Food Industries</b>	<b>5,473</b>	<b>77,224</b>	<b>95%</b>	<b>89%</b>
101: Meat and meat products	561	14,842	10%	17%
102: Fish, crustaceans and molluscs	29	542	1%	1%
103: Fruit and vegetables	121	4,258	2%	5%
104: Vegetables and animals oils and fats	49	987	1%	1%
105: Dairy industry	316	10,810	5%	13%
106: Grains, starches and starchy products	121	2,927	2%	3%
107: Bakery and flour products	3,530	22,803	61%	26%
108: Other food products	608	15,000	11%	17%
109: Products for animal feed	101	1,904	2%	2%
<b>11: Beverage industry</b>	<b>308</b>	<b>9,246</b>	<b>5%</b>	<b>11%</b>
1101: Distillation, rectification and blending of spirits	67	2,093	1%	2%
1102: Wines from grapes	84	969	1%	1%
1103: Cider and other fruit-based wines	3	1	0%	0%
1104: Other non-distilled fermented beverages	6	14	0%	0%
1105: Beer	99	535	2%	1%
1107: Soft drinks, mineral waters, other waters	43	5,573	1%	6%
<b>Total food and beverage</b>	<b>5,781</b>	<b>86,470</b>	<b>100%</b>	<b>100%</b>

Source: ESP-Unimi on Infocamere data

# The companies system: agriculture, hunting, forestry and fishing (end 2024)

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 1.71 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.

	<i>Active companies</i>	<i>Employees</i>	<i>% companies</i>	<i>% employees</i>
<b>1 FIELD CROPS</b>	<b>17,059</b>	<b>24,095</b>	<b>41%</b>	<b>34%</b>
Cereals, oilseed and protein crops	13,041	12,461	31%	18%
Horticulture	2,103	6,967	5%	10%
Floriculture	1,101	4,040	3%	6%
Mixed field crops	814	627	2%	1%
<b>2 PERMANENT CROPS</b>	<b>5,253</b>	<b>8,144</b>	<b>13%</b>	<b>12%</b>
Vineyards	2,807	5,776	7%	8%
Fruits and mixed permanent crops	2,446	2,368	6%	3%
<b>3 PLANT REPRODUCTION</b>	<b>621</b>	<b>2,248</b>	<b>1%</b>	<b>3%</b>
<b>4 LIVESTOCK</b>	<b>8,343</b>	<b>15,054</b>	<b>20%</b>	<b>21%</b>
Cattle and buffaloes	4,084	8,516	10%	12%
Sheep and Goats	862	804	2%	1%
Horses	713	727	2%	1%
Pigs	552	1,917	1%	3%
Poultry	522	1,387	1%	2%
Other livestock	1,490	1,352	4%	2%
Mixed livestock	120	351	0%	0%
<b>Field crops-livestock combined</b>	<b>7,427</b>	<b>11,157</b>	<b>18%</b>	<b>16%</b>
<b>AGRICULTURAL PRODUCTION ACTIVITIES (1-5)</b>	<b>38,703</b>	<b>60,698</b>	<b>93%</b>	<b>86%</b>
<b>6 AGRICULTURAL SUPPORT ACTIVITIES</b>	<b>1,544</b>	<b>8,088</b>	<b>4%</b>	<b>11%</b>
Plant production support activities	1,026	5,561	2%	8%
Livestock production support activities	212	382	1%	1%
Others production support activities	306	2,145	1%	3%
<b>7 HUNTING INCLUDING RELATED SERVICES</b>	<b>6</b>	<b>10</b>	<b>0%</b>	<b>0%</b>
<b>8 FORESTRY AND RELATED SERVICES</b>	<b>1,015</b>	<b>1,712</b>	<b>2%</b>	<b>2%</b>
<b>9 FISHERIES AND AQUACULTURE</b>	<b>140</b>	<b>211</b>	<b>0%</b>	<b>0%</b>
<b>TOTAL</b>	<b>41,408</b>	<b>70,719</b>	<b>100%</b>	<b>100%</b>

Source: ESP-Unimi on Infocamere data

## Surfaces cultivated in Lombardy (hectars)

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 trends for fallow land in accordance with CAP regulations. A progressive decline in permanent forage crops and agricultural woody crops, particularly fruit trees.

### *Hectars by type of crops in Lombardy*

	2025	2024%	2025/21 %	2025/24 %
<b>ARABLE LAND (all harvest)</b>	<b>845,387</b>	<b>100.00</b>	<b>1.2</b>	<b>-1.9</b>
Cereals, <i>of which:</i>	316,995	37.5	-3.1	-1.9
Wheat and spelt	63,712	7.5	-5.0	-19.8
Rice	100,307	11.9	2.6	5.0
Grain maize and corn-cob-mix	124,998	14.8	-6.8	7.9
Dry pulses and protein crops	3,131	0.4	-42.6	-39.3
Oilseed crops	45,775	5.4	-15.0	-22.0
Sugar beet	1,182	0.1	-16.2	-42.2
Potatoes and Fresh vegetables	27,230	3.2	39.2	11.1
Temporary grasses and grazings,	359,969	42.6	10.6	2.5
Green maize	197,192	23.3	1.5	4.7
Plants harvested green from arab	75,809	9.0	-12.4	-3.0
<b>PERMANENT GRASSLAND</b>	<b>190,535</b>		<b>-6.2</b>	<b>-1.2</b>
<b>PERMANENT CROPS</b>	<b>29,712</b>	<b>100.0</b>	<b>-7.1</b>	<b>-1.8</b>
Wine grapes	22,501	75.7	-5.7	-1.2
Olive	2,390	8.0	-0.5	0.3
Fruits, berries and nuts, <i>of which:</i>	4,821	16.2	-15.6	-5.5
Apple tree	1,288	4.3	-22.0	-4.5

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 2025, production increases were seen for cereals (corn), vegetables, and wine, while other products experienced widespread declines.

Many animal products experienced increasing trends: among meats, only poultry saw increases, while increases continued for milk and eggs.

### ***Main agricultural productions of Lombardy (thousands of tons)***

	2025	2025/21 %	2025/24 %
Cereals, of which:	2,622	-6.3	8.8
<i>Common wheat and spelt</i>	390	-10.9	-2.9
<i>Rice</i>	576	-7.7	-1.4
<i>Grain maize and corn-cob-mix</i>	1,482	-5.2	19.5
<i>Other cereals</i>	174	0.4	-5.5
Oilseed crops	169	-20.0	-8.6
Potatoes and Fresh vegetables	1,138	12.2	24.0
Fruits, berries and nuts	67	-3.2	-8.3
Wine (.000 hl)	1,249	-8.8	17.5
Cattle meat	295	-0.9	-4.3
Pork meat	840	1.9	-1.2
Poultry meat	271	-16.9	0.6
Cow milk deliveries (.000 hl)	6,225	5.8	1.3
Eggs (millions of pieces)	2,174	1.0	0.5

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

## Animal production and stocks of Lombardy farms

The decline in the number of dairy farms continued in 2025.

Over the last four years, the decline has been most pronounced for beef cattle and pigs.

The number of livestock raised is also declining, except for dairy cattle. The average size of dairy farms and production yields are increasing, both reaching excellent levels.

	2025	2025/21 %	2025/24 %
Cattle farms	11,100	-12.5	-3.1
<i>Dairy cattle farms</i>	4,879	-5.9	-1.6
<i>Beef and mixed cattle farms</i>	6,220	-17.1	-4.2
Sheep and goat farms	10,377	-3.7	-1.7
Pig Farms	2,241	-17.4	-4.9
Cattle heads total	1,509,749	-2.0	-0.3
<i>Dairy cattle heads</i>	1,141,652	3.5	0.7
<i>- of which dairy cows</i>	577,163	3.7	0.9
<i>Beef cattle heads</i>	368,097	-15.9	-3.0
Milk yield (kg/cow/year)	10,785	2.0	0.3
Cattle slaughtering	698,518	-5.8	-4.3
Sheep and goat heads	184,305	-10.6	-3.7
Pig heads	3,765,319	-15.1	-2.0
Pork slaughtering	4,593,081	-15.6	-1.2
Cattle medium consistency	136.0	11.9	2.9
Dairy cattle medium consistency	234.0	9.9	2.3
<i>- dairy cows medium consistency</i>	118.3	10.1	2.6
Beef cattle medium consistency	59.2	1.4	1.3
Sheep and goat medium consistency	17.8	-7.1	-2.0
Pigs medium consistency	1,680	2.8	3.0

Source: ESP-Unimi on Anagrafe Zootecnica and AGEA



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