

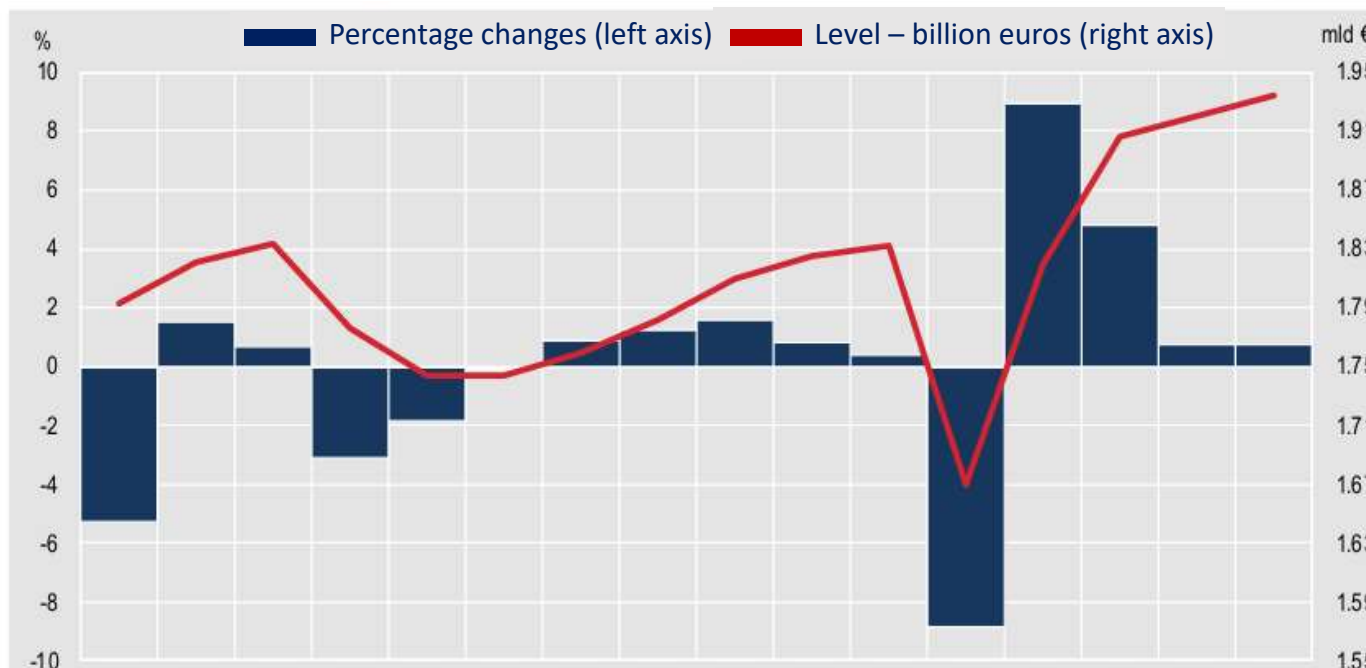


Agrievolution
Economic Committee
Federica Tugnoli
28 April 2025



Economic situation

TREND OF GDP IN VOLUME - Years 2009–2024, chain-linked values in millions of euros (reference year 2020) and annual percentage changes



Source: ISTAT



In 2024, agriculture in Italy returns to grow



€42.4 billion

The added value of agriculture that places Italy in first place in the EU27

Spain follows (€39.5 billion), France (€35.1 billion), and Germany (€31.9 billion).

AGGREGATES	Million euros (current prices) Year 2024	Volume change 2024/2023 %	Price change 2024/2023 %	Value change 2024/2023 %
Crop production	40597	1,5	2,9	4,5
Livestock production	21108	0,6	-2,2	-1,6
Agricultural production of goods	61705	1,2	1,1	2,3
Agricultural services production	5974	-1,5	2,5	1
Agricultural production	67679	1	1,2	2,2
Related activities	6912	5,2	-2,5	2,6
Total agricultural branch production	74592	1,4	0,8	2,2
Intermediate consumption	32180	-1	-4,5	-5,5
Gross value added at basic prices	42412	3,5	5,3	9
Net value added at basic prices	31045	4,6	7,8	12,7
Factor income	35582			11,3
Total agricultural labour force (in thousands of AWU)	907			-2,6
Agricultural income indicator				12,5

Source: ISTAT

Historic record for agri-food exports



Agri-food exports:
€69.1 billion in
2024

➔ **+8%**

Top export markets

Germany - €10.6 billion

United States - €7.8 billion

France - €7.5 billion

Source: ISMEA

Weather

In 2024, over **300** extreme weather events



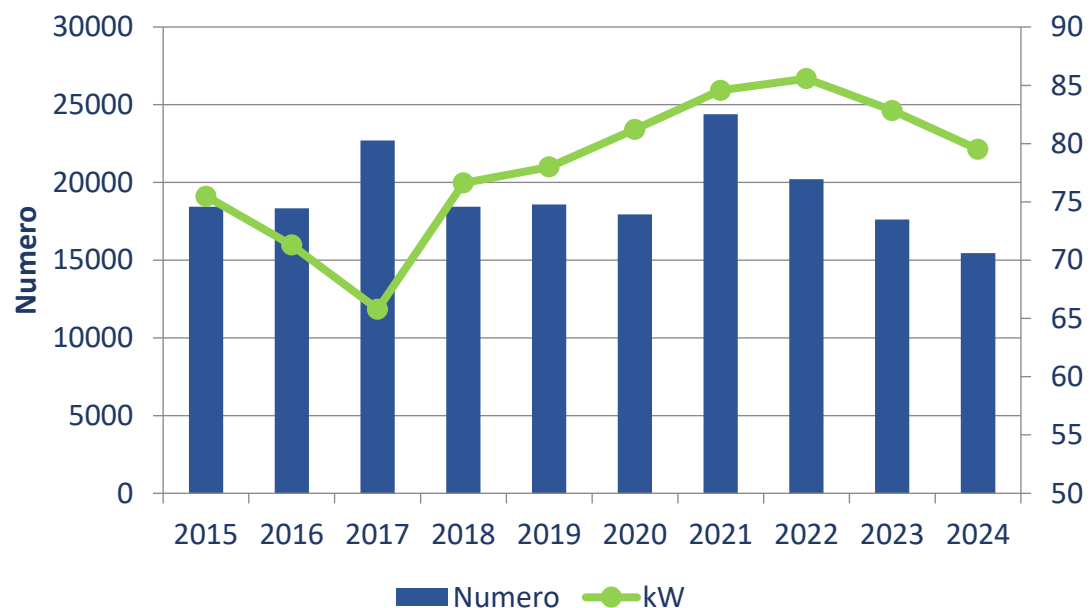
Italy split in two between too much water in the North and drought in the South



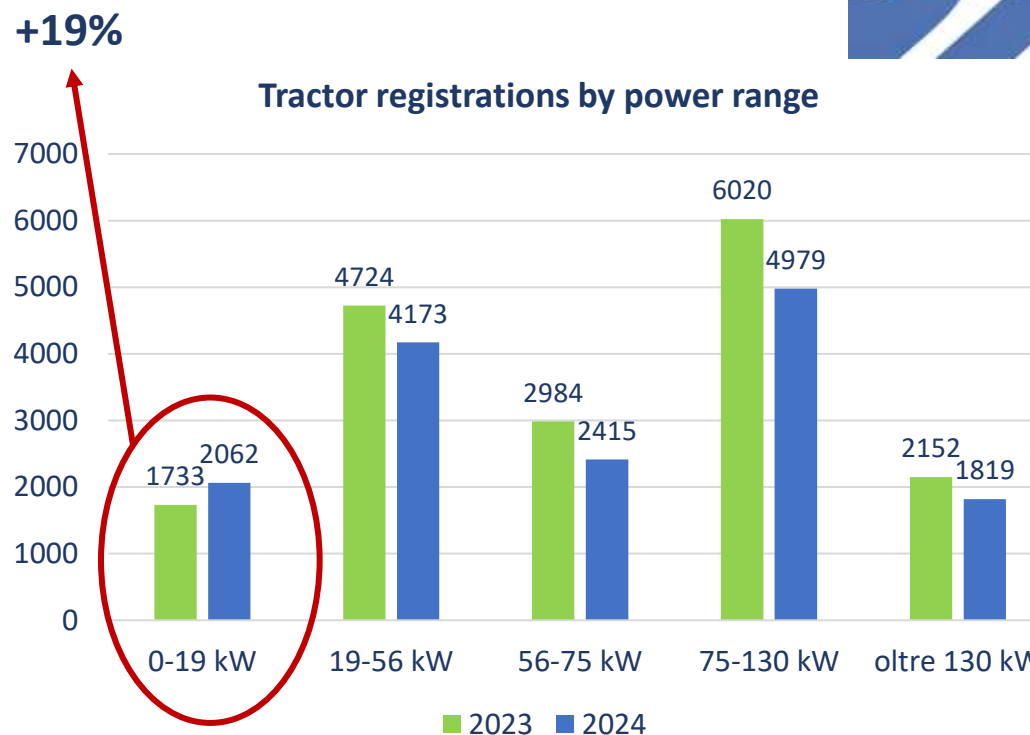
Tractor registrations



Tractor registrations: Units and average power



Tractor registrations by power range



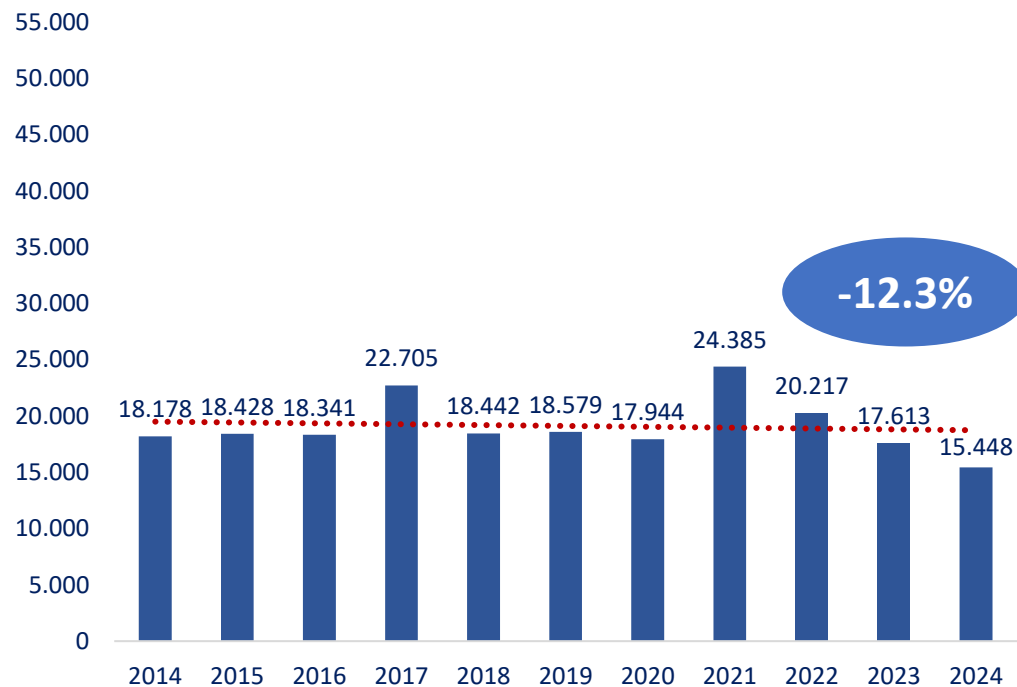
Source: Ministry of Transports data processed by FederUnacoma Economic and Statistical Dept.

New and used tractor

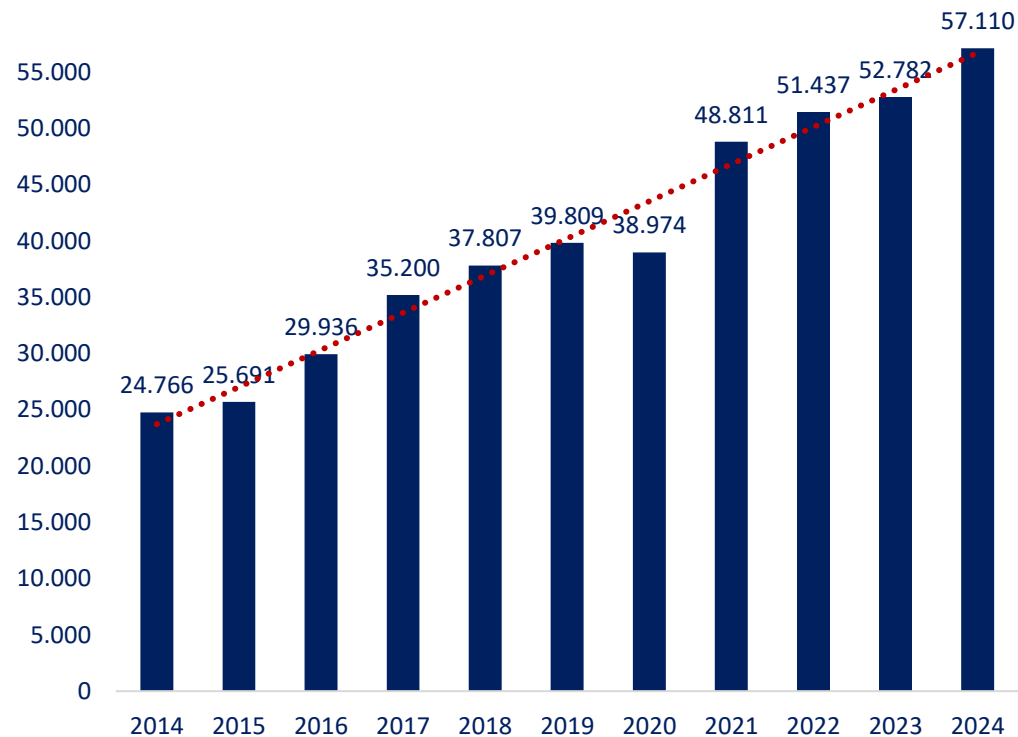
TOTAL DEMAND (new + used) = 72,558

+3%

NEW



USED



Source: Ministry of Transports data processed by FederUnacoma Economic and Statistical Dept.

The registrations of other machinery

IMMATRICOLAZIONI-REGISTRATIONS GENNAIO/JANUARY-DICEMBRE/DECEMBER 2024



MIETITREBBIATRICI COMBINE-HARVESTERS				TRATTRICI CON PIANALE DI CARICO TRANSPORTERS			RIMORCHI TRAILERS			SOLLEVATORI TELESCOPICI TELEHANDLERS		
REGIONI/REGIONS	2024	2023	Var. %	2024	2023	Var. %	2024	2023	Var. %	2024	2023	Var. %
ABRUZZO	*	6	-	12	10	20,0%	248	207	19,8%	*	4	-
BASILICATA	*	11	-	1	10	-90,0%	111	148	-25,0%	12	12	0,0%
CALABRIA	*	0	-	15	12	25,0%	316	280	12,9%	*	9	-
CAMPANIA	*	10	-	31	34	-8,8%	445	513	-13,3%	37	36	2,8%
EMILIA R.	35	56	-37,5%	29	25	16,0%	709	708	0,1%	135	182	-25,8%
FRIULI	*	13	-	4	10	-60,0%	210	236	-11,0%	18	19	-5,3%
LAZIO	*	5	-	18	19	-5,3%	443	397	11,6%	19	30	-36,7%
LIGURIA	0	0	-	23	48	-52,1%	32	27	18,5%	0	2	-100,0%
LOMBARDIA	36	43	-16,3%	87	93	-6,5%	863	759	13,7%	324	329	-1,5%
MARCHE	27	32	-15,6%	5	6	-16,7%	148	161	-8,1%	36	33	9,1%
MOLISE	*	5	-	3	3	0,0%	103	98	5,1%	*	7	-
PIEMONTE	53	77	-31,2%	64	71	-9,9%	756	844	-10,4%	111	148	-25,0%
PUGLIA	12	34	-64,7%	4	9	-55,6%	441	480	-8,1%	62	57	8,8%
SARDEGNA	*	3	-	3	4	-	204	192	6,3%	*	4	-
SICILIA	17	17	0,0%	30	31	-3,2%	409	437	-6,4%	28	29	-3,4%
TOSCANA	11	20	-45,0%	44	47	-6,4%	355	430	-17,4%	31	43	-27,9%
TRENTINO	0	0	-	71	119	-40,3%	439	509	-13,8%	16	37	-56,8%
UMBRIA	13	13	0,0%	9	10	-10,0%	121	107	13,1%	13	9	44,4%
VALLE D'AOSTA	0	0	-	7	11	-36,4%	29	61	-52,5%	*	8	-
VENETO	29	45	-35,6%	65	45	44,4%	1122	1124	-0,2%	110	143	-23,1%
TOTALE	266	390	-31,8%	525	617	-14,9%	7.504	7.718	-2,8%	977	1.141	-14,4%

Source: Ministry of Transports data processed by FederUnacoma Economic and Statistical Dept.

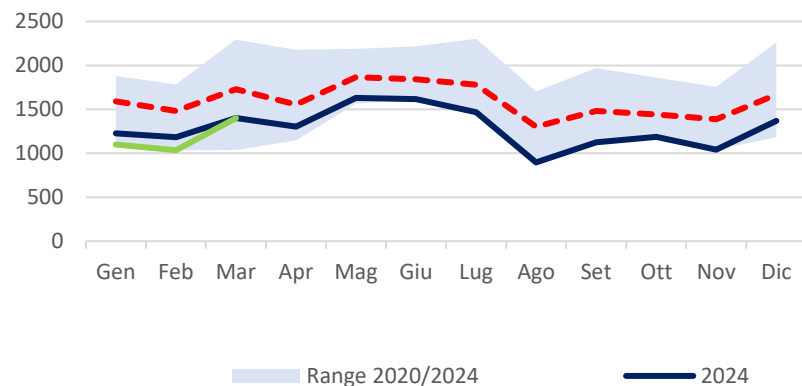


Registrations in I quarter 2025



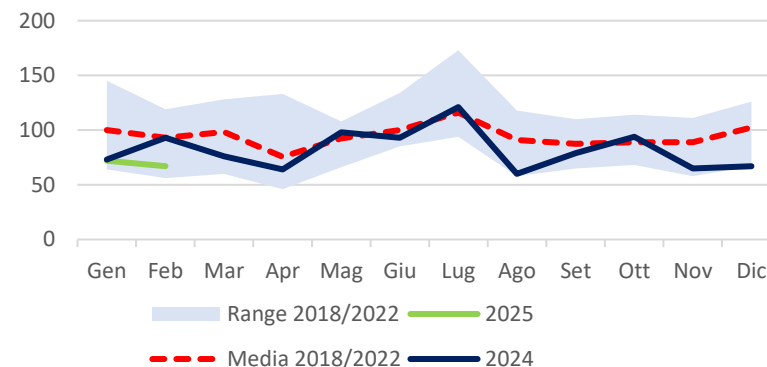
-7%

Trattrici



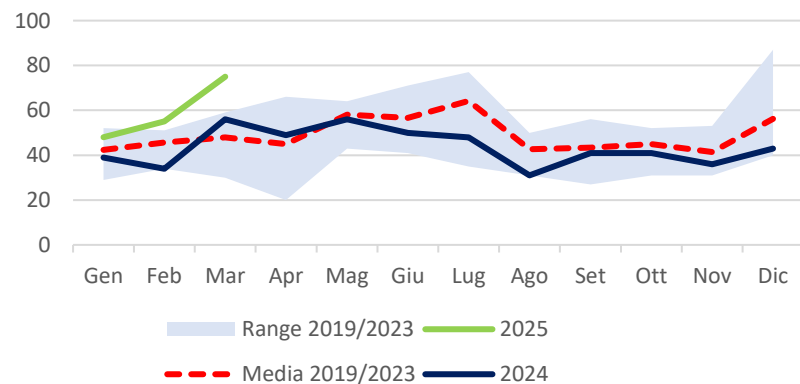
-8%

Sollevatori telescopici



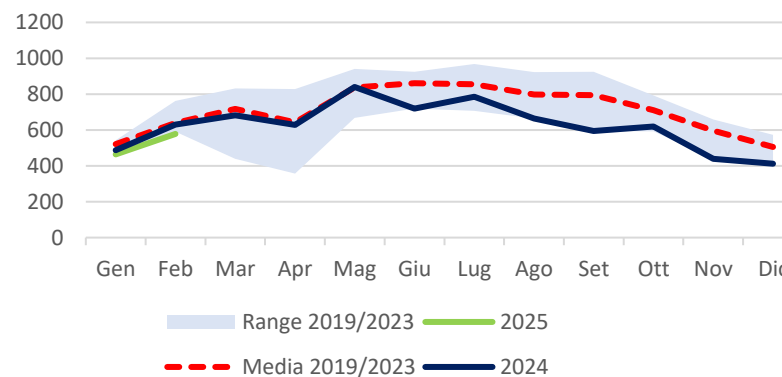
+36%

Trattrici con pianale



-6%

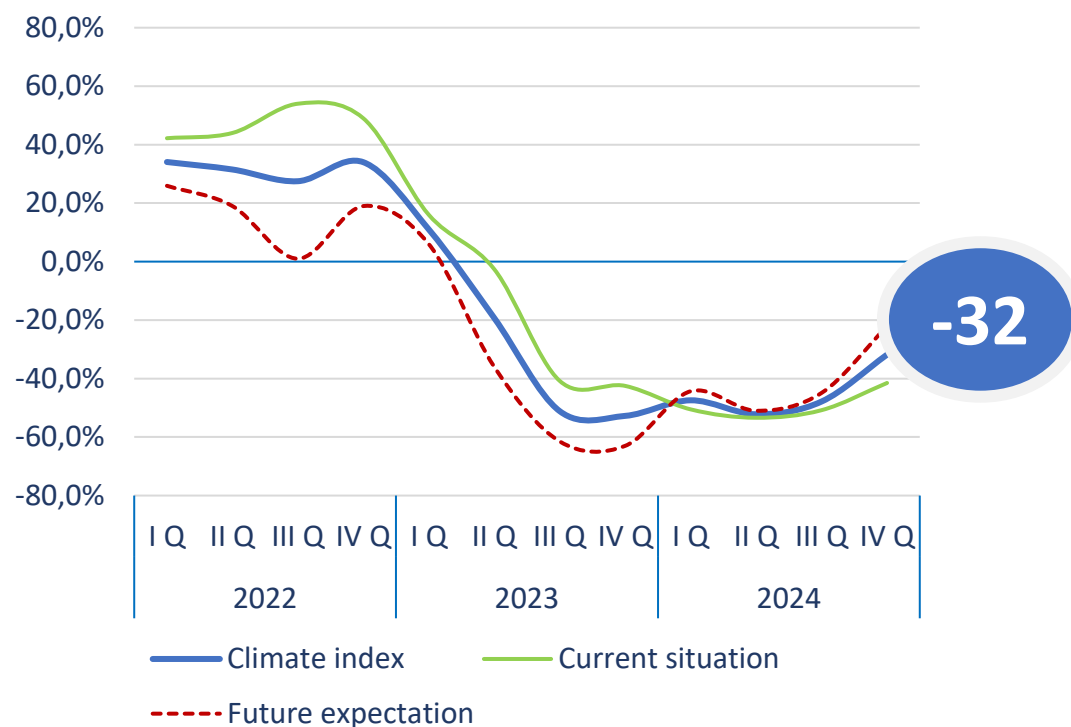
Rimorchi



II barometro FederUnacoma

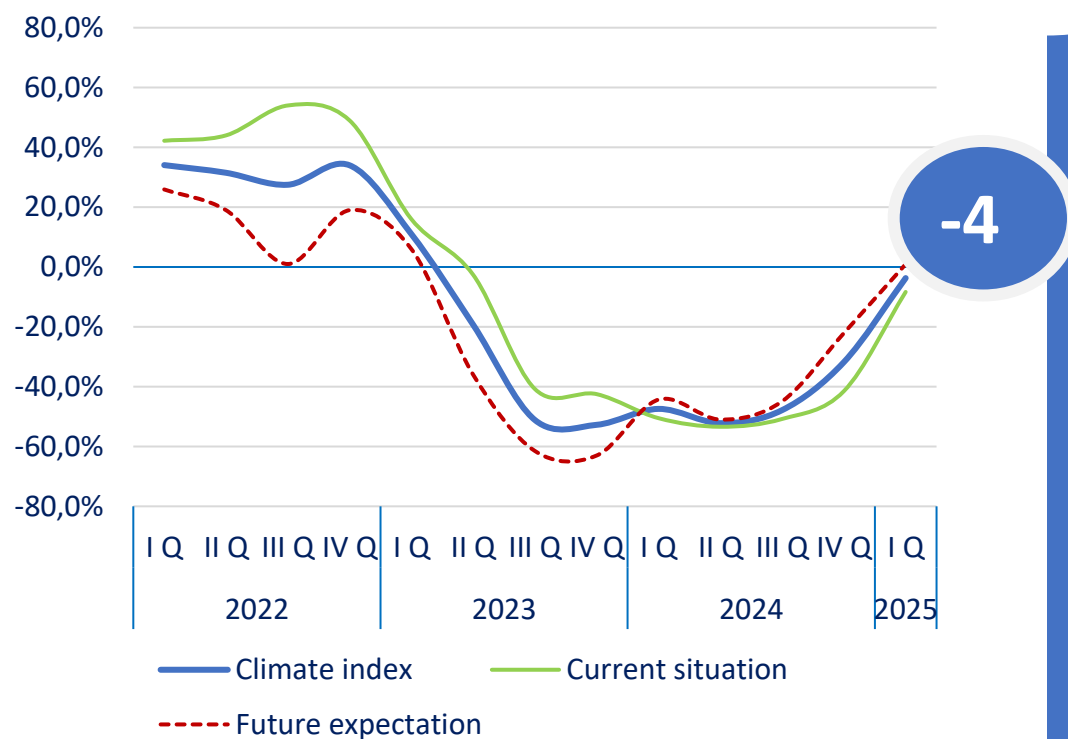
IV Quarter 2024

Climate index



I Quarter 2025

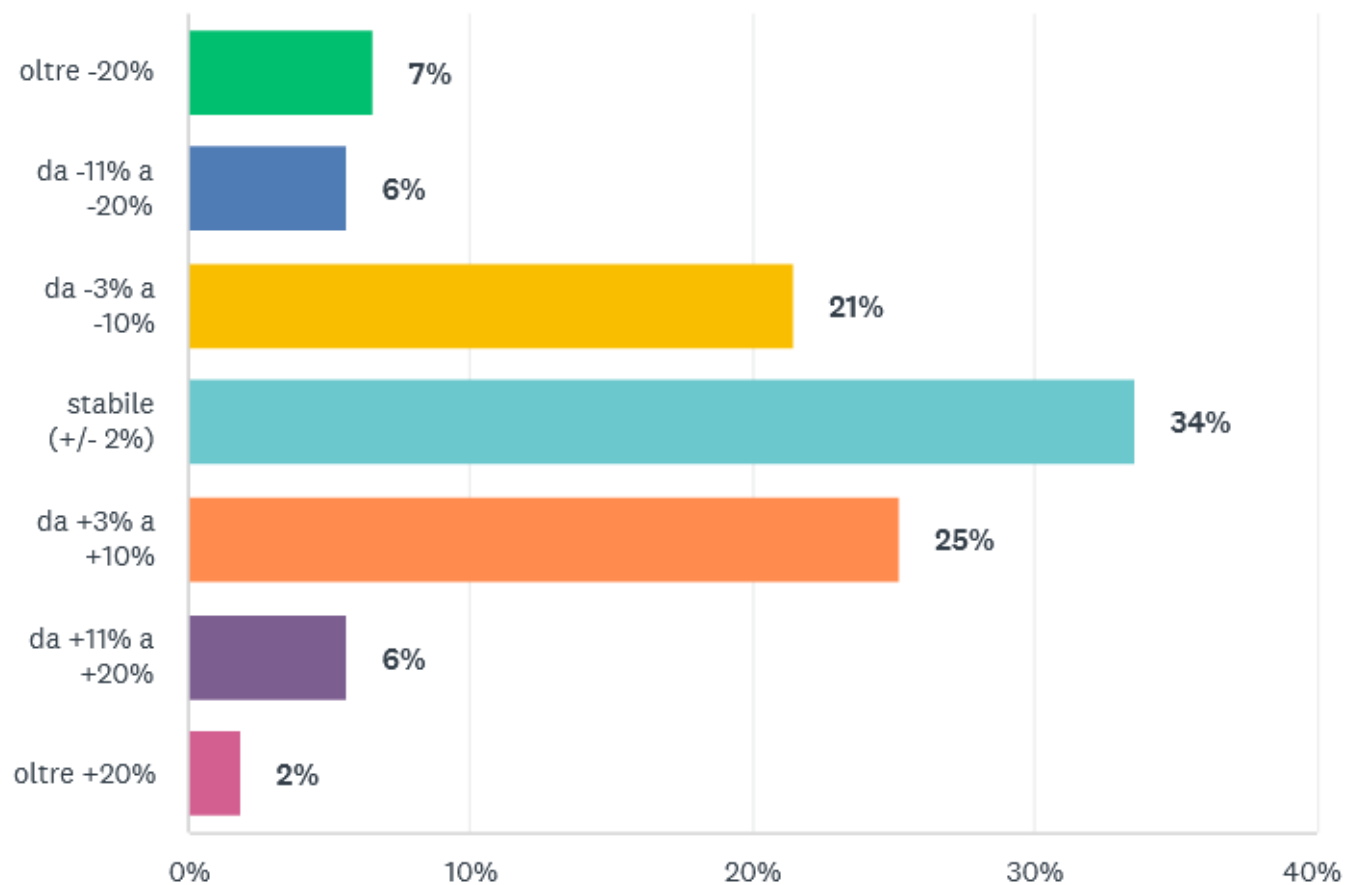
Climate index



Expectations for the first half 2025

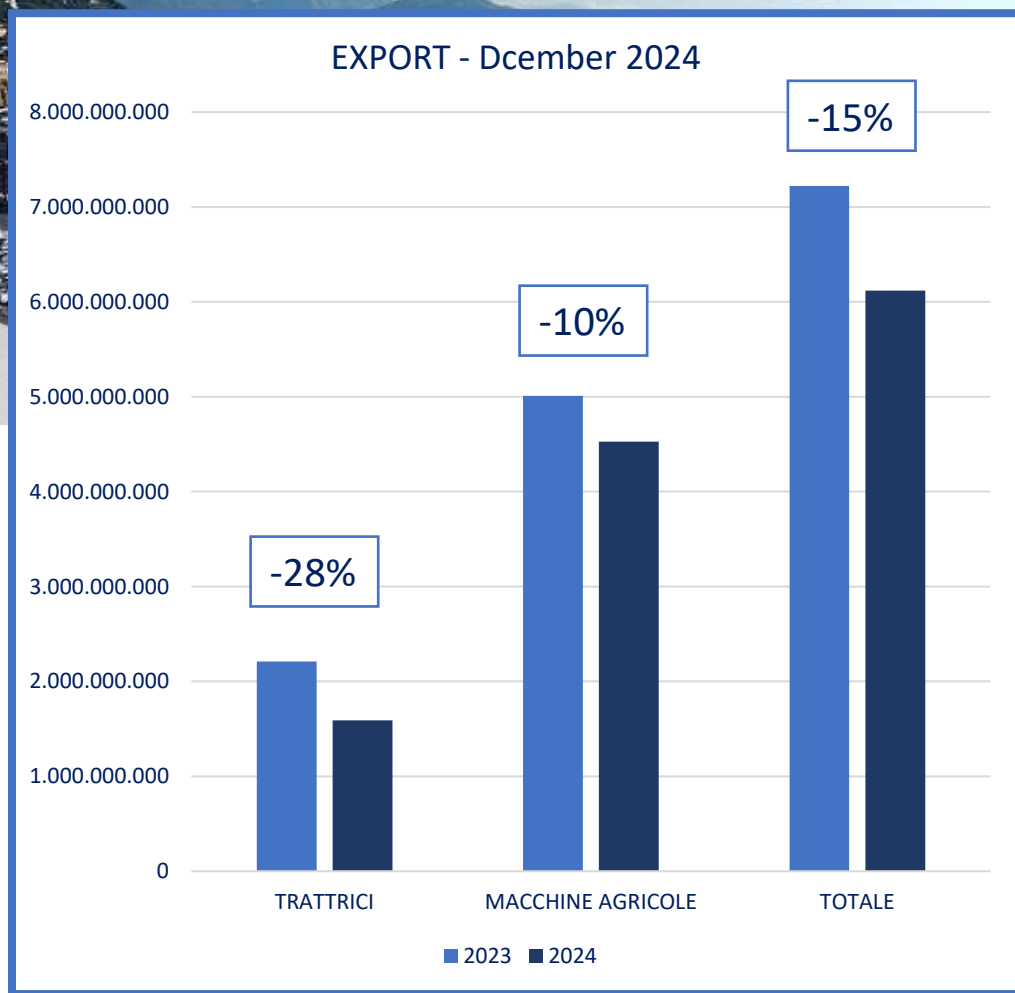
Barometro FederUnacoma

I Quarter 2025



Source: FederUnacoma Economic and Statistical Dept.

Exports of tractor and ag. machinery



Ranking of destination countries

	PAESE	% share on total
1	U.S.A.	12,34%
2	FRANCE	12,29%
3	GERMANY	8,67%
4	SPAIN	4,95%
5	TURKEY	4,69%
6	POLAND	4,02%
7	UK	3,37%
8	CHILE	3,33%
9	AUSTRIA	3,19%
10	BELGIUM	2,71%
11	NETHERLAND	2,01%
12	GREECE	2,00%
13	RUSSAN FED.	1,97%
14	ROMANIA	1,70%
15	SWITZERLAND	1,63%
16	AUSTRALIA	1,63%
17	CANADA	1,47%
18	BULGARY	1,45%
19	PORTUGAL	1,33%
20	CHINA	1,23%

Source: ISTAT data processed by FederUnacoma Economic and Statistical Dept.



Highlights

In Italy - High production costs, elevated interest rates: non competitive prices

Abroad – weak demand: reduced profitability for farmers, lower availability of government support for investment, adverse weather conditions

Government Funds are crucial

Warehouses are gradually emptying

Uncertainty: the United States is the primary market for our products

THANK YOU!



federica.tugnoli@unacoma.it

