Connact Agri

Consiglio Nazionale delle Ricerche
IBBA
Istituto di Biologia e Biotecnologia Agraria

CNR- IBBA REPORT

Brussels, 4 February 2026

Connact Annual Meeting

IL SISTEMA ITALIA E LE PRIORITÀ DELL'UNIONE EUROPEA

THE FUTURE OF THE SECTOR

THE COMMISSION'S PERSPECTIVES

European agriculture enters a **phase of structural transformation** characterised by moderate productivity growth, increasing climate pressure and a strong reorientation towards more sustainable systems.

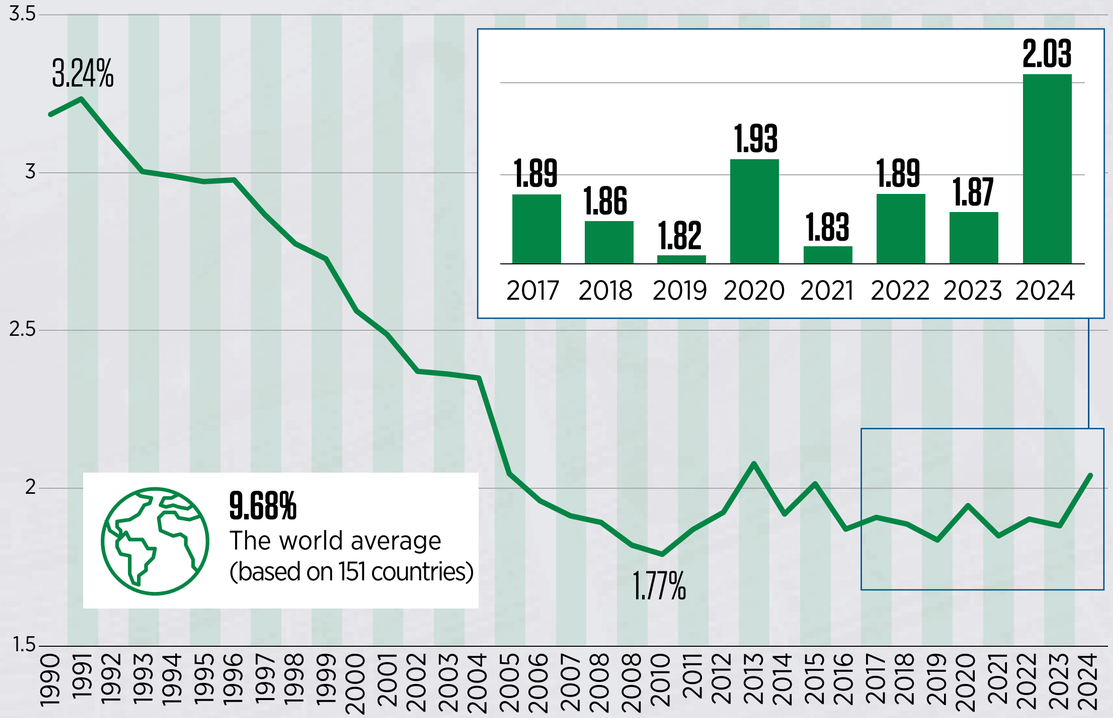
According to the European Commission, the EU will maintain a **high level of self-sufficiency** and strengthen trade in high value-added products, while structural changes in the sector will continue and the **growth of labour productivity** will remain the main driver of agricultural income.

At the same time, we observe a **structural reduction** in the number of farms and livestock, a sign of a transition that is not only technological but also economic and social.

Italy's GDP in agriculture is low compared to the world average, but in 2024 there was some **increase compared to recent years**.

Italy's GDP in agriculture

Data in % of national total



Source: The Global Economy

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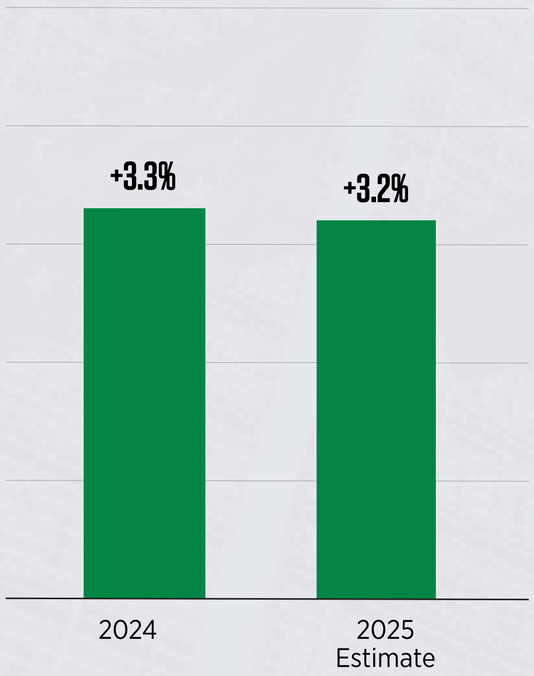
AGRIBUSINESS IN THE MACROECONOMIC CONTEXT

AGRICULTURE AND PROCESSING INDUSTRY

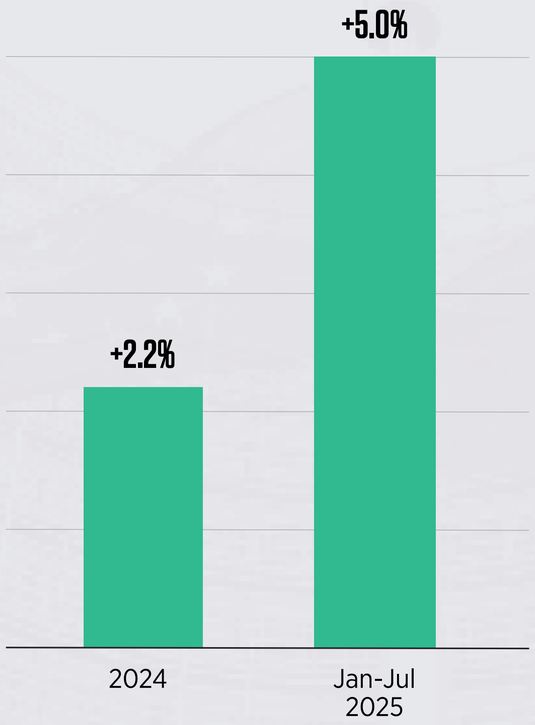
World GDP

Annual change in %



World Trade

Annual change in %



Added value at constant prices

+2%
Agriculture, forestry, and fishing

+3.2%
Food and Beverage Industry

€81,9 billion
the added value of the agri-food sector in Italy in 2024

€15 billion
public resources invested in agriculture in the 2023–2025 three-year period

Source: ISMEA 2025 Report on Italian Agribusiness

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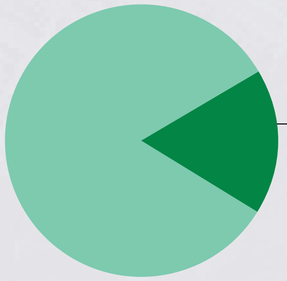
ITALIAN AGRIBUSINESS

COMPARISON WITH EU, % CHANGE FROM PREVIOUS YEAR

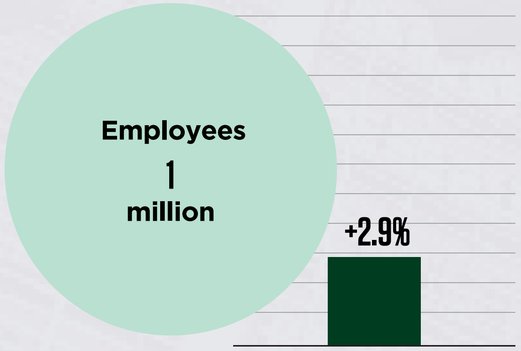
Agricultural sector



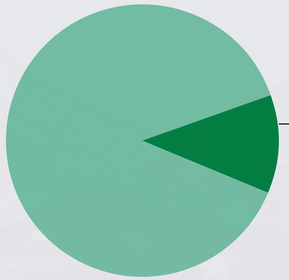
Italy's added value in 2024 n the EU

17.4%

first ranking



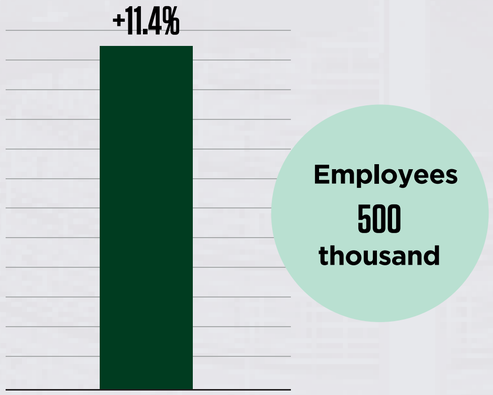
Food industry



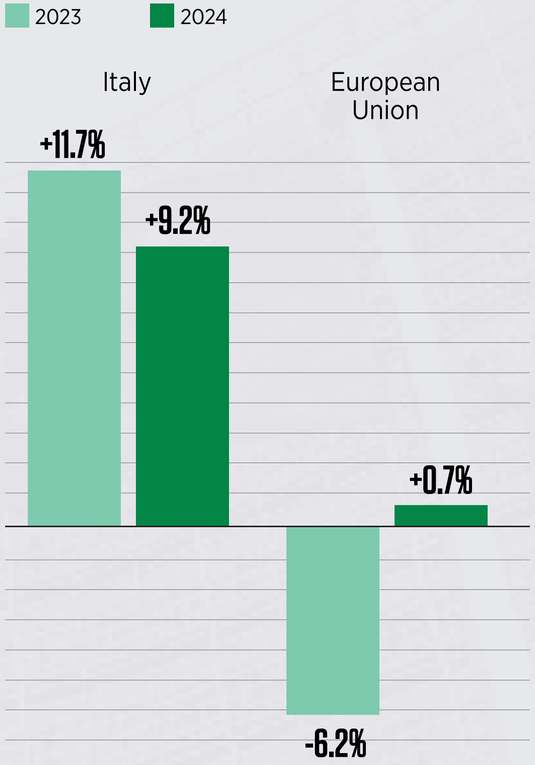
Italy's added value in 2024 in the EU

11.8%

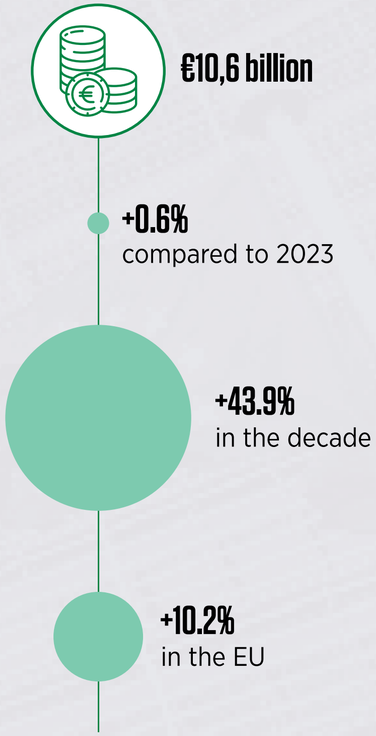
third ranking



Agricultural income



Agricultural investments 2024



Source: ISMEA 2025 Report on Italian Agribusiness

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FIVE FORCES OF TRANSFORMATION

THE DRIVERS THAT ARE AFFECTING THE AGRICULTURAL SYSTEM

The Commission emphasises that only strong investment in research, technology, and innovation enables Europe to remain competitive, resilient, and sustainable

1. **EU Policy and Governance**: CAP and new visions for the future focus on simplification, sustainability and innovation (Green Deal, Farm to Fork, NGT, sustainability, animal welfare).

2. **Climate crisis**, which increases production volatility and systemic risk. Climate and extreme risks: extreme events cost ~€28 billion/year to EU producers.

3. **Scientific and technological innovation:** genomics, AI, precision agriculture, digital farming, sensors, robotics... Europe's Smart Agriculture market is developing rapidly.

4. **Transformation of production systems** (organic, regenerative, intensity reduction,

above-ground).
5. **Markets and geopolitics**, which influence inputs, costs, and competitiveness. Markets and competitiveness: stable protein consumption and strong EU exports.

Source: Align Act Accelerate. Research, Technology and Innovation to boost European Competitiveness

SYSTEMIC CHALLENGES

THE TOMATO CHAIN IN EUROPE AND ITALY

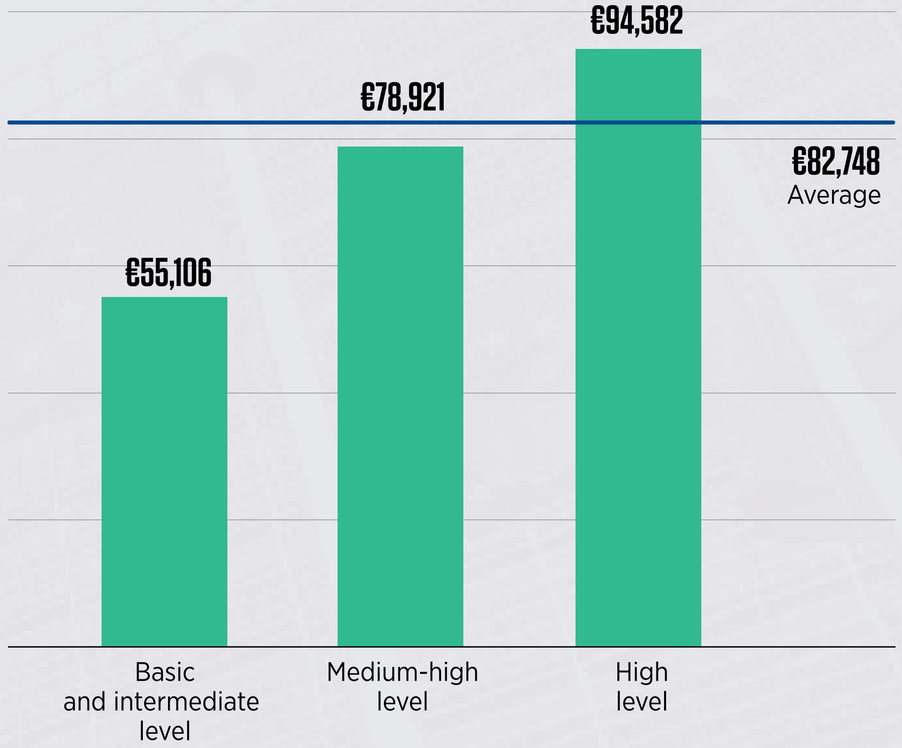
These drivers generate five systemic challenges:

- Ensuring productivity with less input and impact
- Adapting crops and livestock to increasing climatic stresses
- Reducing the environmental footprint maintaining profitability
- Safeguarding quality, safety, and value of production
- Maintaining territorial cohesion and socio-economic sustainability

The AGRIculture100 Report shows that sustainability is no longer an optional goal but a competitive requirement: the most sustainable companies are also the most productive, profitable, and innovative.

Productivity of agricultural enterprises

Annual turnover per employee in euro, 2023–24



Source: AGRIcoltura100-RAPPORTO-2025

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RESEARCH AND INNOVATION

THE CHALLENGE IS NOT ONLY TO INNOVATE, BUT TO MAKE INNOVATION ACCESSIBLE, SCALABLE, AND SYSTEMIC

Research and innovation as a strategic infrastructure. Research is no longer an external support, but an infrastructure of the agricultural system.

The **New Genomic Techniques** enable the development of climate- and disease-resilient and more sustainable crops with a proportionate, product-based approach.

New techniques of genetic improvement (e.g. genomic selection) allow drastic reductions in breeding time and phytochemicals use.

The EU recognises that **investing in R&I is essential for productivity, competitivity and well-being**.

The CNR identifies among its strategic priorities the **strengthening of research infrastructures**, technology transfer, and stakeholder connection.

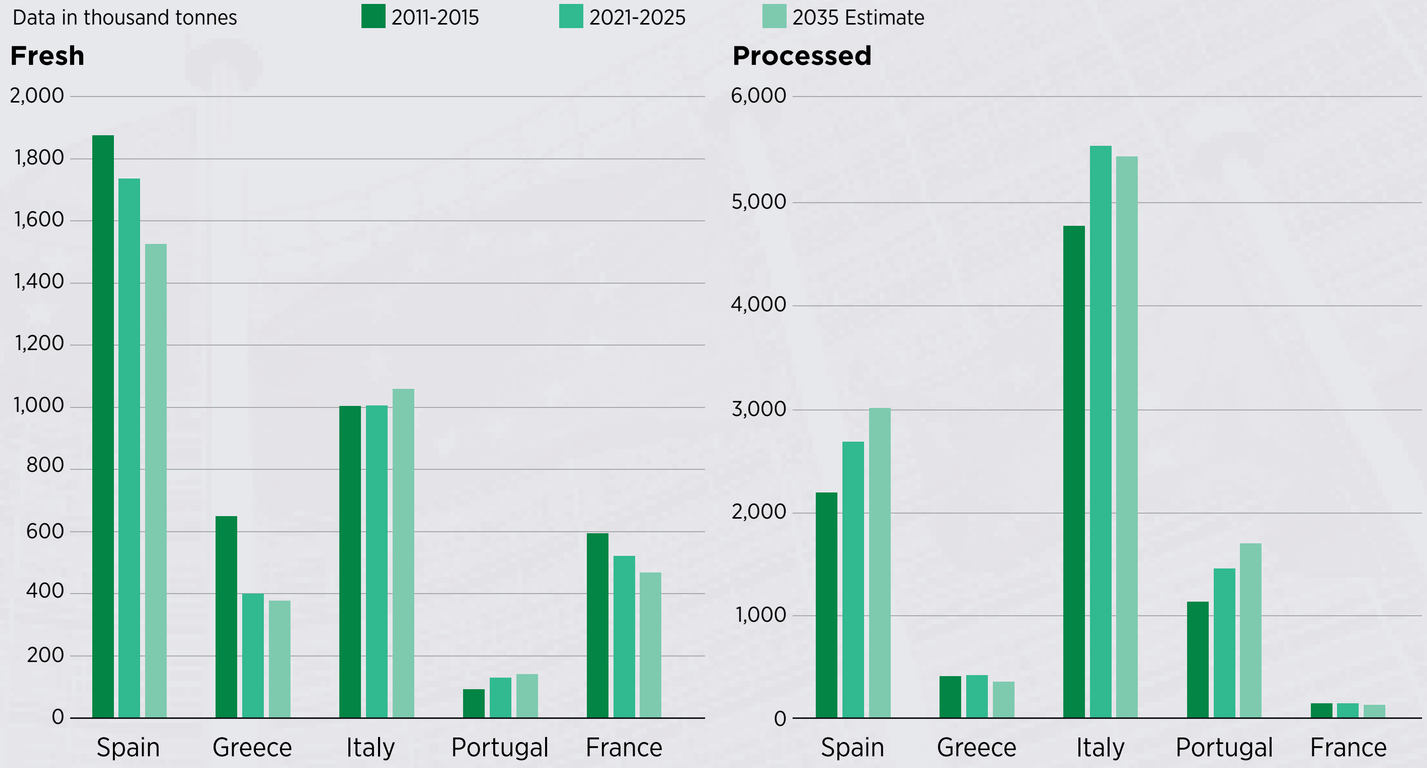
Sources: EPSO first reaction to the trilogue provisional agreement New Genomic Techniques (NGTs), EPSO; Plant breeding techniques in a new era, Wageningen University and research; Align Act Accelerate: Research, Technology and Innovation to boost European Competitiveness, European Commission; CNR Strategic Vision Document 2024–2033, CNR

APPLICATION SCENARIO

THE TOMATO CHAIN IN EUROPE AND ITALY

The tomato chain is strategic in terms of volume, economic value, and employment. According to the EU Agricultural Outlook, tomato markets are **evolving with growth in the processing and snacking segments** and the EU will continue to favour high value-added crops, maintaining high self-sufficiency and directing competitiveness towards quality, sustainability, and innovation.

The production of tomatoes



Source: EU Agricultural Outlook 2025–2035, European Commission AGMEMOD simulation.

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APPLICATION SCENARIO

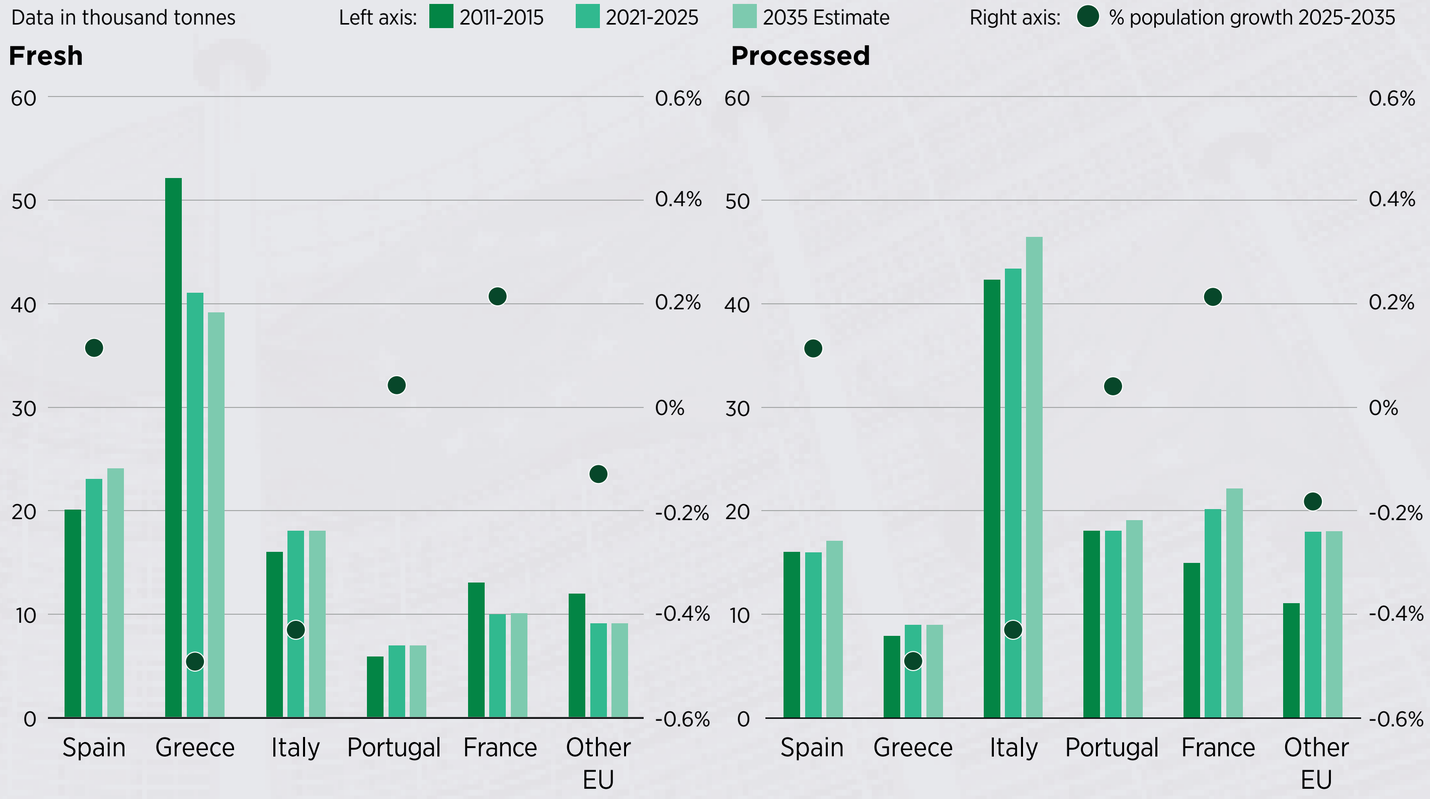
THE TOMATO CHAIN IN EUROPE AND ITALY

Overall demand for fresh tomatoes in the EU is expected to increase by around 7% between now and 2035.

The trend towards smaller varieties observed in recent years is also expected.

Per capita consumption of processed tomato products is expected to grow in all EU countries at a rate of between 0.1% and 1.3%. This reflects the **increasing demand for convenience foods and prepared dishes**, which fit today's hectic lifestyles.

The production of tomatoes



Source: EU Agricultural Outlook 2025–2035, European Commission AGMEMOD simulation.

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APPLICATION SCENARIO

THE TOMATO CHAIN IN EUROPE AND ITALY

Specific development lines

Precision Genomics for resilience to drought and disease. New Genomic Techniques make it possible to develop more drought- and disease-resistant varieties much faster than with traditional breeding, reducing chemical inputs and increasing yield stability.

Sensor technology and AI for irrigation and nutrition decisions for precision agriculture.

Traceability based on blockchain data for quality and transparency.

Integrated climate resilience solutions precision irrigation, mulching, cover crops.

The integration of advanced genetics, precision agriculture, and sustainable soil management can transform the tomato industry into a laboratory of climate resilience and European competitiveness.

Source: EU Agricultural Outlook 2025–2035, European Commission

APPLICATION SCENARIO

TRANSFORMATION OF THE DURUM WHEAT SUPPLY CHAIN

Durum wheat is a key crop for European food sovereignty and for the Italian production identity (pasta and semolina).

The EU Agricultural Outlook indicates that **the EU will maintain high self-sufficiency**, but with productivity under pressure from climate and input costs.

The Durum wheat sector is particularly vulnerable to:

- spring dryness and thermal stress in flowering
- instability of yields
- international competition on cheap commodities.

New breeding techniques allow the rapid introduction of water and heat stress tolerance and fungal disease resistance traits, **increasing yield stability and reducing the use of phytochemicals**.

Without an acceleration of varietal innovation and precision agriculture, the risk is an increasing dependence on imports and a loss of competitiveness of European cereal supply chains.

Source: EU Agricultural Outlook 2025–2035, European Commission

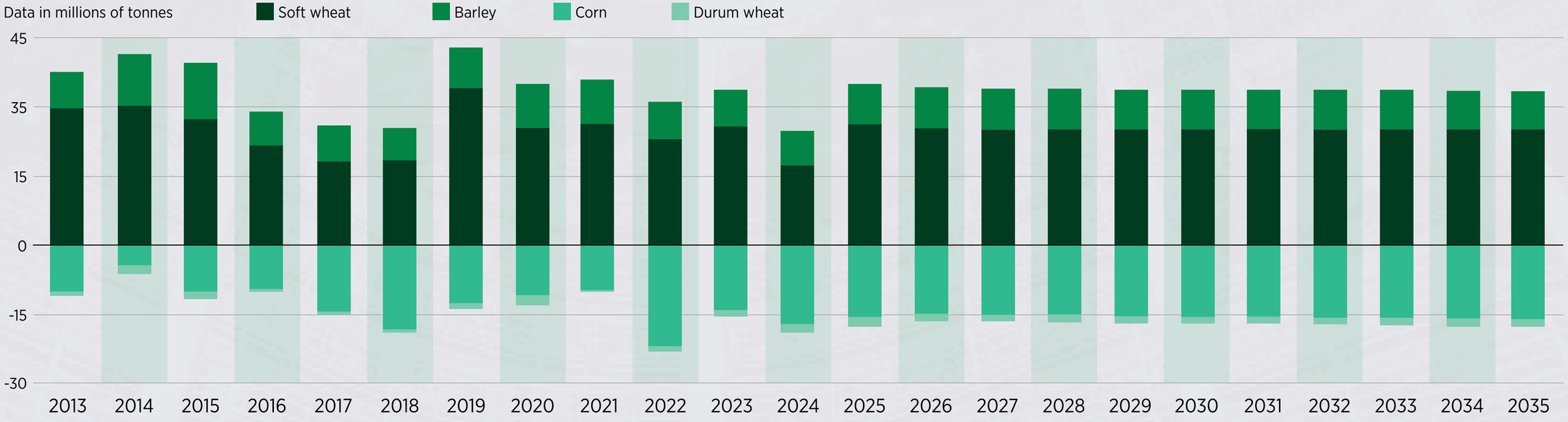
SCENARIO

TRANSFORMATION OF THE DURUM WHEAT SUPPLY CHAIN

By 2035, the EU's total cereal production is expected to reach **267.7 million tonnes** (0.6% higher than the annual production in 2023–2025).

Wheat production is expected to remain stable, having increased relative to the decline during the 2023–2025 period, due to higher yields that will offset the reduction in cultivated area.

Net trade in cereals in the EU

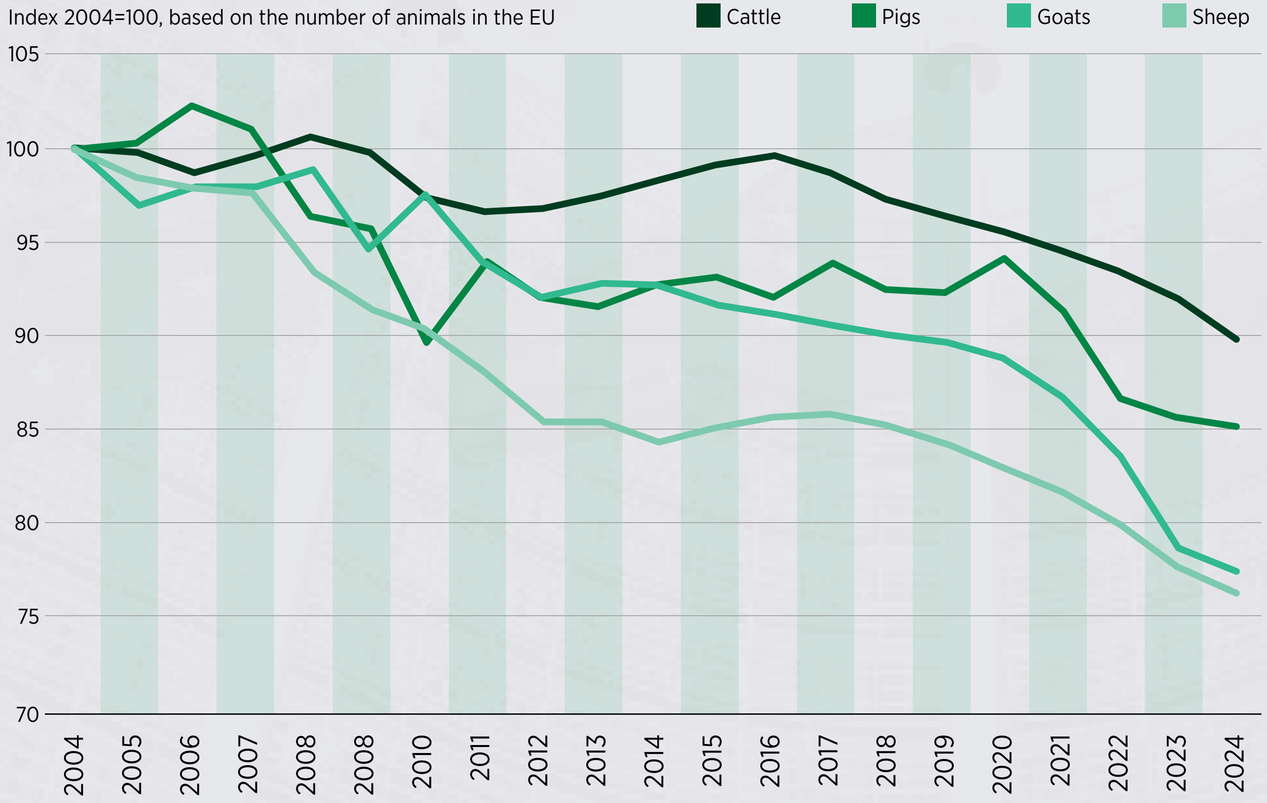


Source: Tagliacarne Study Centre, 2025

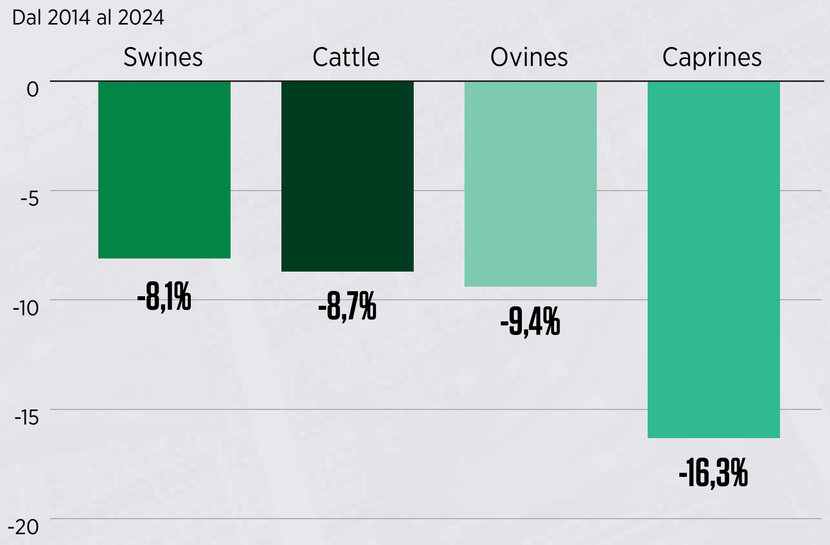
ANIMAL HUSBANDRY

STRUCTURAL DECLINE OR TRANSITION TO BE GOVERNED?

Evolution of livestock populations



The decline in livestock populations



This reduction is linked to environmental, regulatory, economic, and social pressures, but it carries risks for:

- food security
- productive sovereignty
- biodiversity and rural land management.

Source: Eurostat

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STRATEGIC PRIORITIES

FOR EUROPEAN AND ITALIAN AGRICULTURE

Facing challenges and seizing opportunities
requires integration and shared vision:

- Stable and simplified policies-CAP oriented to innovation, resilience, and sustainability
- Investment in systemic R&I-digital technology, genetics, new technologies
- Enterprises as protagonists-capable to adopt and scale up innovations
- Territories and innovation clusters-local experimentation infrastructure
- Training and managerial skills-new talents for agriculture 4.0