

In collaboration with



Parlamento europeo  
Ufficio in Italia

# Connact

Annual Meeting

# THE ITALIAN SYSTEM AND THE PRIORITIES OF THE EUROPEAN UNION

**BRUSSELS, 4 FEBRUARY 2026**

**AGRIFOOD COMPETITIVENESS  
BETWEEN NEW EU RULES,  
EXTERNAL SHOCKS, AND  
SUPPLY CHAIN INNOVATION**

prepared by



Consiglio Nazionale delle Ricerche  
Istituto di Scienze delle  
Produzioni Alimentari

The agrifood sector is called upon to safeguard competitiveness by adopting a more dialogue-oriented approach with all parts of the supply chain, while new measures (legislative and non-legislative) are being developed to implement the *'Vision for Agriculture and Food'* strategy. What initiatives are needed to balance security and traceability with competitiveness, and how can we work together to find solutions that ensure sustainability and innovation?

### **Rules and compliance: security and traceability without loss of competitiveness**

The EU regulatory framework imposes stricter compliance obligations and requires dedicated investments, with possible consolidation effects and the risk of exclusion for smaller operators unable to comply. The discussion between policy and business can focus on how to make compliance a factor in market reliability, avoiding 'margin squeeze' if costs are not accompanied by value recognition.

### **External pressures and market transformations: climate, geopolitics, digitalisation and consumption**

Converging shocks and trends are on the table: climate crisis, geopolitics and trade, food inflation and digital transformation, which can widen the digital divide and put non-digitalised SMEs in difficulty.

On the demand side, there is a growing focus on quality/sustainability/traceability and plant-based/functional foods segments, with an advantage for certified products and those who innovate on nutritional profiles. In fact, the plant-based sector is expected to earn \$162 billion by 2030, while the functional foods sector is expected to earn \$104 billion by 2033.

### **2025-2030 choices and shared levers for action: from innovation to technology transfer**

The proposed scenarios for 2025-2030 ("Consolidation & Quality Premium", "Green Resilience Pivot", "Digital Divide Acceleration") help focus decisions on which supply chains and investments to prioritise to remain competitive and resilient. These levers include resources and programmes for R&I, as well as collaboration and technology transfer mechanisms.

The aim is to identify a "system" path integrating innovation, adaptation, and implementation across the supply chain and the territory.