

Fallow Fields, Falling Incomes: The CAP 2023–2027 Framework in the Italian Cereal Sector

Champs en jachère, revenus en baisse : Le cadre de la PAC pour 2023–2027 dans le secteur cérééalier italien

Brachliegende Felder, sinkende Einkommen: Die GAP 2023–2027 im italienischen Getreidesektor



point de vue

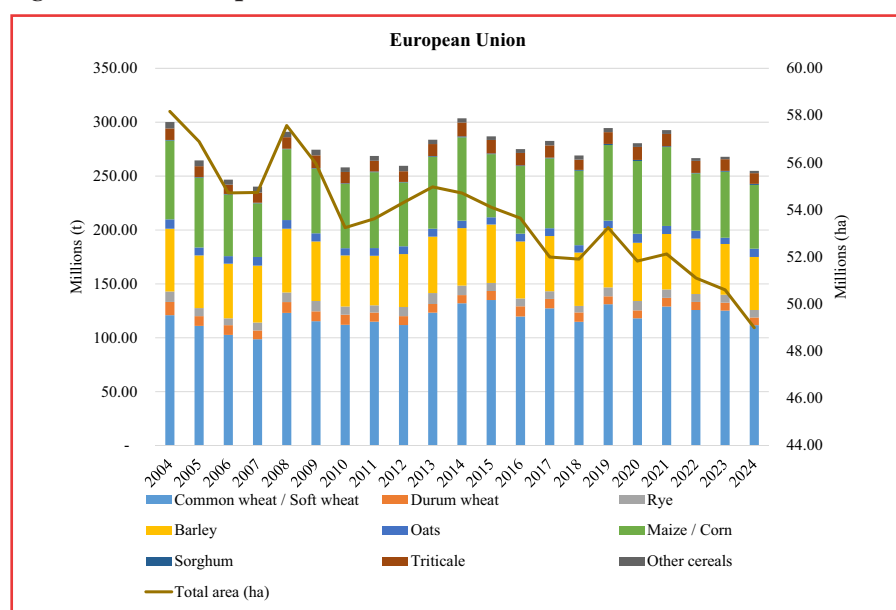
by
Emanuele Spada, Fabian Capitanio, Giacomo Falcone, Giovanni Gulisano and Anna Irene De Luca

EU cereal contraction (2022–2024)

Analysis of recent Eurostat data reveals an erratic trajectory in the EU's cereal production over the last two decades, characterised by significant fluctuations in both harvested quantities and key productivity indicators. This variability culminated in a sustained contraction in the 2004–2024 period (Figure 1). This downturn is rooted in a complex interplay of adverse meteorological phenomena, surging input costs – particularly for fertilisers and energy – and profound trade disruptions precipitated by the Russo-Ukrainian conflict. Since 2014, parallel to yield reductions, statistics reflect a significant contraction in cultivated area. This decline is consistent with the 2014–2020 CAP framework's institutionalisation of 'greening' measures, specifically the EFA (Ecological Focus Areas) requirements that necessitated the removal of arable land from active production.

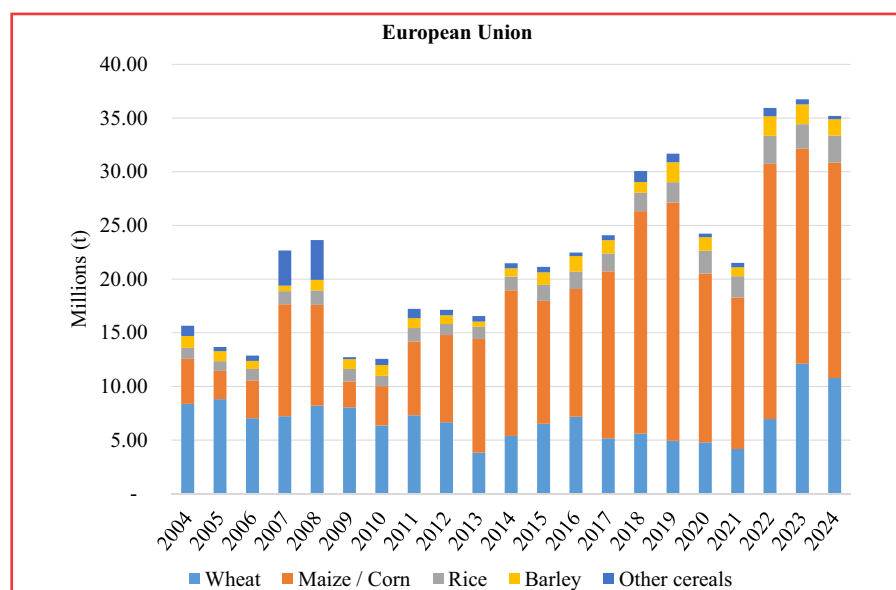
In contrast to the contraction in domestic output, EU cereal imports surged in 2022 (Figure 2), marking a substantial increase over the baseline (2017–2021). This influx served as a critical compensatory mechanism, effectively offsetting the systemic deficit in internal production. The expansion was primarily spearheaded by maize and wheat. By 2023, imports of both crops expanded, signaling a

Figure 1: EU cereal production and area trends



Source: Authors' elaboration on Eurostat data.

Figure 2: Extra-EU cereal imports



Source: Authors' elaboration on Eurostat data.

sharp escalation of 14 per cent and 134 per cent, respectively, compared to the baseline.

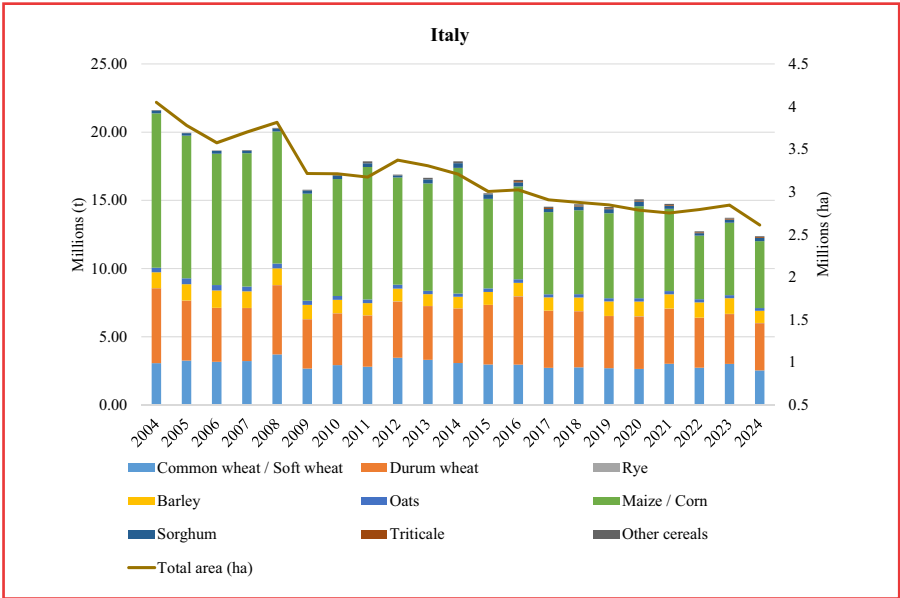
While 2024 saw a marginal correction in aggregate imports, the persistent growth in maize and wheat inflows (14 per cent and 115 per cent above baseline) indicates a structural deficit. This heightened dependency reflects a lasting shift in the EU’s supply-demand balance, driven more by the long-term withdrawal of productive land than by transient market shocks.

“ Les paiements agroenvironnementaux sont clairement perçus comme compromettant les objectifs de production des exploitations agricoles. ”

Since 2020, cereal markets have experienced extreme volatility; prices have not only doubled in value but have also undergone erratic fluctuations. Beyond natural drivers, the intensification of financialisation has significantly exacerbated this instability. This process has triggered a decoupling of commodity prices from physical supply-demand fundamentals, shifting the locus of price discovery toward global financial hubs, where prices are determined by speculative liquidity – e.g. vast flows of non-commercial capital seeking financial returns – rather than regional agricultural availability (Capitanio *et al.*, 2020).

Consequently, EU producers have increasingly assumed the role of ‘price takers’ within a framework defined by the erosion of ‘natural hedging’. This collapse of the traditional inverse correlation between yield and price has left agricultural holdings uniquely vulnerable to systemic financial shocks.

Figure 3: Italian cereal production and area trends



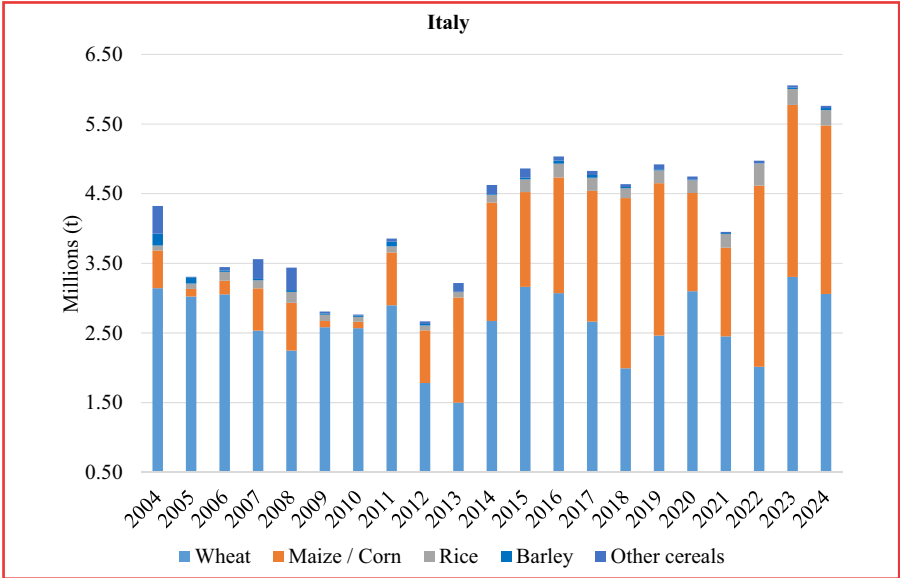
Source: Authors’ elaboration on Eurostat data.

Structural decline and import reliance in Italy

Agricultural production in Italy closely mirrored the broader systemic decline observed across the EU, as shown by Eurostat data, with cereal production reaching its lowest levels in the past two decades. In 2022, total output plummeted, representing a 13.5 per cent contraction relative to the 2017–2021 baseline (Figure 3). While 2023 saw a marginal recovery, this figure remained 7 per cent below the 5-year average, failing to signal a return to the pre-crisis levels. Crucially, the downward trajectory intensified in 2024, with production

further receding – a 15 per cent reduction against the baseline. A comparative analysis of land use reveals a significant decoupling between cultivated areas and actual output. Despite the sharp contraction in yields, the total cereal acreage remained remarkably resilient. This suggests that the initial production shocks were primarily driven by exogenous factors – such as climate volatility and input cost surges – rather than a deliberate reduction in land allocation, likely reflecting a delayed response to sustained market instability and the exhaustion of producer resilience.

Figure 4: Italian extra-EU cereal imports



Source: Authors’ elaboration on Eurostat data.

The significant domestic production deficit observed during the 3-year period necessitated a strategic pivot toward international markets, resulting in a significant escalation of cereal imports from extra-EU origins. Compared to a 2017–2021 average baseline, Italy's import volumes surged by 7.7 per cent in 2022, 31.1 per cent in 2023, and 24 per cent in 2024 (Figure 4). Throughout the 3-years, maize and wheat consistently remained the primary drivers of this trend. Notably, while the import-to-consumption ratio shifted dramatically, Italian cereals exports remained stagnant, showing no significant variation relative to historical averages. This divergence highlights a deepening structural trade deficit and a heightened vulnerability to global price fluctuations.

Despite its restricted temporal scope, this confirms that the observed declines in domestic production and land use align with EU forecasts. According to the European Commission (EC, 2023), the primary catalysts for this reduction are water scarcity and the fluctuating competitiveness of arable land. Although a shift toward extensive livestock farming is projected to provide a marginal buffer for grassland and fodder areas, persistent climate-induced yield constraints and input limitations are expected to keep output substantially below historical norms.

Italy's CAP Strategic Plan: the outlook for cereals

A pivotal structural innovation of the Common Agricultural Policy (CAP) 2023–2027 is the introduction of Eco-schemes. While Member States are mandated to allocate at least 25 per cent of their Pillar I budgets to these instruments, their adoption remains voluntary for farmers. However, upon elective participation, producers are contractually bound to comply with the specific environmental commitments for a minimum of two years. Operationalised in January 2023 through National CAP Strategic Plans (CSPs), these schemes are functionally analogous to the previous Pillar II agri-environment-climate measures

(AECMs). However, they are distinguished by their legal and financial disbursement framework: unlike competitive, project-based grants, Eco-scheme participants are entitled to direct, non-competitive funding upon fulfilment of eligibility criteria. Furthermore, in a departure from the formerly centralised and standardised 'greening measures', the current regulatory framework grants Member States significant subsidiarity and administrative autonomy. Member States are empowered to design bespoke interventions, provided they address at least two predefined environmental objectives, such as climate change mitigation, biodiversity enhancement, or the protection of water and soil quality. Within the Italian CSP, this autonomy led to the strategic formulation of Eco-schemes specifically tailored to the national agronomic landscape, with profound implications for the cereal sector's economic viability and production choices.

GAEC 7 rotation standards: the policy–practice gap

Within the framework of its National CSP, Italy has implemented five distinct Eco-schemes. The most critical intervention for the arable sector is Eco-scheme 4, titled 'Extensive Fodder Systems with Crop Rotation'. This

scheme is supported by an annual budgetary allocation of €169 million, representing 19 per cent of the total financial resources dedicated to Eco-schemes in Italy, whose primary objectives are aligned with the EU's Specific Objectives of climate change mitigation and carbon sequestration, and sustainable management of natural resources and reduced chemical dependency. Operationally, the scheme is predicated on compliance with the enhanced requirements of Good Agricultural and Environmental Conditions (GAEC 7). It incentivises the integration of leguminous, fodder and 'renewable crops' into rotation cycles, with a rigorous focus on crop residue management to foster carbon sequestration. The original mandate of GAEC 7 stipulated a strict annual crop rotation, requiring a change of the primary crop at the parcel level at least once per year (with specific derogation for perennial crops, grasses and fallow land). Under this initial framework, a 'crop' was defined by its botanical genus. Consequently, the succession of cereals belonging to the same genus – such as durum wheat, common wheat, triticale or spelt – was classified as monocropping, rendering such practices ineligible under GAEC 7 standards. Recognising the operational constraints imposed by this rigidity, EU institutions enacted a



Durum wheat field at maturity © the authors.

significant amendment (Regulation (EU) 2024/1468), which introduced crop diversification as a viable alternative to strict annual rotation. While the overarching principle of rotation remains a core environmental goal, this amendment eliminates the mandatory requirement for an annual crop change at the individual parcel level, providing producers with greater flexibility to balance environmental compliance with market and agronomic realities.

Divergent outcomes: territorial concentration vs. environmental efficacy

In 2023, voluntary participation in Eco-scheme 4 far exceeded institutional projections, recording an exceptionally high adoption rate. According to the 'Financial and Physical Monitoring of Ecological Schemes 2023' published by the National Rural Network, the measures attracted 284,000 eligible applications, encompassing a total area of 3.10 million hectares. This figure represents a significant portion of Italy's 7.19 million hectares of arable land (7th General Agricultural Census, 2020) and dramatically surpasses the Complementary Strategic Plan (CSP) target of 1.48 million hectares.

“Es herrscht eindeutig die Auffassung, dass Agrarumweltzahlungen die Produktionsziele der landwirtschaftlichen Betriebe gefährden.”

The spatial distribution of this uptake reveals a pronounced territorial imbalance: participation was predominantly concentrated in the Southern regions (48 per cent), followed by Central Italy (30 per cent), while Northern regions accounted for only 22 per cent. This geographic



Mediterranean agricultural landscape © the authors.

disparity provides robust empirical evidence for the concern raised by Latacz-Lohmann *et al.* (2022), who argue that voluntary, 'menu-based' selection mechanisms often incentivise the concentration of environmental practices on marginally productive land.

Conversely, highly intensive arable regions and livestock strongholds – most notably the Po Valley – exhibited significantly lower engagement. These areas, characterised by larger-than-average farms (14 ha compared to the national average of 9 ha, Italian National Institute of Statistics, ISTAT) appear to prioritise productivity and economic output over the marginal incentives offered by the scheme.

This trend invites a critical re-evaluation of the mechanism's environmental additionality. The concentration of subsidies in less intensive areas suggests a 'windfall effect' where payments may be supporting pre-existing low-impact practices rather than driving transformative changes in high-pressure agricultural zones. As noted by Nitsch *et al.* (2017), generalised and relatively lenient conservation standards often yield limited substantive impacts on climate protection, particularly when they fail to penetrate the most intensive production systems.

Geopolitical shocks and food security: derogations

The contraction in domestic output, alongside an escalating reliance on external supply chains, has intensified the EU's exposure to geopolitical volatility. The Russian–Ukrainian conflict starting in 2022 serves as a critical case study in this vulnerability; given the role of both nations as 'global breadbaskets', the disruption of cereal exports posed an immediate threat to international food stability. While the EU maintains some self-sufficiency in wheat, its livestock sector faces significant risks due to its structural dependence on Ukrainian maize for animal feed.

In response to this supply shock, the European Commission implemented an emergency framework to safeguard food security and bolster system resilience (Mezzacapo, 2024). Beyond a €500 million financial support package, the EU introduced strategic derogations from GAEC 7 and 8 standards and an Italian Ministerial Decree. These exemptions were designed to maximise the EU's productive potential by suspending mandatory environmental requirements, such as crop rotation and non-productive land set-asides. This policy shift reflects a pragmatic, albeit temporary, emphasis on domestic production preference over the transition to sustainable food systems,

directly affecting the operational baseline of the 2023 Eco-schemes.

Food sovereignty constitutes a holistic paradigm integrating rights, justice and ecological sustainability beyond mere self-sufficiency. The EU currently faces a structural paradox: the need for increased output is constrained by land saturation and a normative shift toward ecosystem restoration. This supply deficit is increasingly bridged via significant import reliance, effectively displacing environmental burdens toward the Global South (Fuchs *et al.*, 2020). Such externalisation of ecological impacts to offset domestic production losses undermines the integrity of the European Green Transition, reinforcing the very systemic vulnerabilities that food sovereignty seeks to dismantle.

Quality and risk: CAP uncertainty for Italian food excellence

In a complex geopolitical scenario, the decline in primary commodity production within the EU –specifically cereals – carries multi-level systemic risks. Beyond eroding food sovereignty and increasing exposure to external shocks, these developments threaten the stability of Italy's high-value

agri-food chains. A sustained reduction in maize and wheat output directly destabilises the livestock and the pasta industries, both of which are structurally dependent on these inputs.

The 2024 reports by the Italian Agri-food Sector – ISMEA and Qualivita – highlight that livestock production contributes €21.45 billion to the overall agricultural output of €59.17 billion. Within this framework, certified Geographical Indications (GIs) for cheese and meat account for €9.3 billion and €5.5 billion, respectively, at the consumer level. Collectively, these GIs constitute 83 per cent of the total value attributed to Italian GIs, underscoring their significant economic impact on the sector.

Similarly, Italy dominates European pasta production, accounting for 72.6 per cent of the EU's total turnover (€8.1 billion in 2023, according to CREA, 2023).

The operational risks of CAP instruments are exemplified by Eco-scheme 4, whose implementation has been hampered by ongoing regulatory revisions and political debate. It is these shifting requirements, rather than a lack of farmers' comprehension, that create a climate of technical uncertainty that obstructs correct application, potentially

constraining strategic choices and jeopardising short-term productivity and profitability.

The unprecedented uptake of this scheme – doubling initial surface area forecasts – underscores the powerful influence of CAP subsidies on farm-level decisions, especially as global market dynamics and rising input costs continuously erode profit margins, leaving farmers increasingly dependent on direct payments to maintain economic viability. Adherence to Eco-scheme 4 often means that production availability is dictated by GAEC 7 standards (rotation/diversification) rather than market demand or farm-specific strategic needs. In regions lacking economically viable alternatives, this regulatory alignment risks a medium-term decline in cereal production.

The initial biennial implementation revealed a notable decoupling between projected and actual financial returns. Due to an uptake rate that significantly exceeded institutional forecasts, the individual premia underwent substantial pro-rata adjustment. In Italy, the projected payment of €110 per hectare dropped to a realised disbursement of €64.33 in the first year (2024) and €58.00 in the second year



Straw cereal harvesting phase © the authors.

of implementation (2025). This dilution challenges the cost-effectiveness ratio of the intervention. Faced with unprecedented market volatility, many farmers sought refuge in the perceived financial certainty of Eco-schemes, viewing them as a *de facto* insurance policy against the risks of active cultivation. This mass transition was driven by the anticipation of stable, guaranteed payments in exchange for reduced production. However, this collective 'strategic retreat' triggered an unforeseen *ex-post* economic shock: the overwhelming rate of participation led to a rapid exhaustion of fixed budgetary envelopes. Consequently, producers were met with a drastic and unexpected dilution of aid, with final payments often reduced to nearly half of the anticipated amounts. This 'policy trap' transformed a risk-aversion strategy into a source of further economic destabilisation, exacerbating the crisis for European agricultural holdings.

Research by Colombo *et al.* (2024) suggests that the environmental

benefits, such as carbon sequestration, are often insufficient to offset the costs incurred by farmers under current carbon pricing models. Such low profitability, combined with regulatory complexity, risks farmer disengagement from the CAP (Testa *et al.*, 2025). Voluntarily foregoing these benefits not only halts the adoption of 'good practices' but also deprives legislators of the data required for accurate monitoring (Runge *et al.*, 2022).

This intersection of low profitability and stringent environmental mandates manifested in the widespread European farmers' protests of 2023–2024 (Mazzocchi *et al.*, 2024). These demonstrations highlighted a systemic instability driven by income pressure and trade competition (Matthews, 2024), effectively slowing the policy shifts toward greater environmental conditionality. Exogenous shocks – ranging from meteorological anomalies and armed conflicts to public health crises and logistical disruptions – can precipitate severe

repercussions for the availability of critical agricultural inputs. Such disruptions underscore the multifaceted challenges of agri-food security, necessitating intensified scrutiny across the EU. This is particularly salient for nations such as Italy, which, despite its leadership in the processing and exportation of high-value food products, maintains a structural dependency on external sources for strategic raw materials. The clear perception is that agri-environmental payments are undermining the production objectives of farms. From this perspective, attempts at compensation are being thwarted.

Consequently, and looking toward the post-2027 CAP period, it appears essential to adopt a holistic vision that integrates a broad spectrum of variables. This approach must strike a delicate equilibrium between environmental stewardship and the sustained production of high-quality agri-food products, while simultaneously accounting for broader global dynamics.



Mediterranean agricultural landscape: a rural view in the Calabria region, Southern Italy © the authors.

In this context, it could be argued that a more distinct decoupling of ecological objectives from production-oriented targets within support frameworks warrants consideration. Such a strategic separation might help prevent the adoption of environmental measures driven primarily by rent-seeking behaviour, thereby potentially mitigating the risk of market-distorting conduct. From our perspective, a significant systemic concern resides in the possible displacement of producers and global output volumes; this is a risk that, we argue, could be precipitated by the imposition of environmental commitments that may prove technically or economically non-viable in specific regional settings.

Specifically, policy instruments such as eco-schemes introduce significant income volatility, as the precise magnitude of attainable support remains opaque during the initial decision-making phase. This *ex-ante* uncertainty constrains strategic planning and threatens a further contraction in domestic output, potentially aggravating existing pressures on global food market stability (Capitanio *et al.*, 2020).

“The clear perception is that agri-environmental payments are undermining the production objectives of farms.”

Furthermore, within an EU characterised by diminishing income elasticity and heightened consumer vulnerability, a structural reliance on imports – by intensifying the transmission of global price shocks and logistical costs to the domestic market – exposes European citizens to sudden inflationary pressures. Rather than ensuring lower costs, this dependency threatens to erode purchasing power during periods of international market stress, as the lack of a stable domestic supply reduces the EU's capacity to buffer against exogenous price spikes and speculative volatility.

Among these are the accelerated global population growth, the shifting

of dietary patterns toward increased animal protein consumption, and the intensifying impacts of climate change (Capitanio, 2022).

In our view, it is vital to move beyond the assumption of stable supply chains and proactively prepare for future contingencies. While ‘*alea iacta est*’ (the die has been cast) regarding the urgency of action, we argue that this necessitates a concerted effort to strengthen the resilience of strategic raw materials, such as cereals, across the EU. From our perspective, such a relaunch serves a dual purpose: it addresses food security not merely as a producer-side support, but as a systemic safeguard against global price shocks for consumers. Furthermore, we believe this approach is essential to safeguard the foundational inputs of premium agri-food products, ensuring that European excellence remains grounded in a stable and high-quality domestic supply.

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Further Reading

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Emanuele Spada, Giacomo Falcone, Giovanni Gulisano and Anna Irene De Luca, Department of Agriculture, University Mediterranea of Reggio Calabria, Italy.

Emails: emanuele.spada@unirc.it; giacomo.falcone@unirc.it; ggulisano@unirc.it; anna.deluca@unirc.it

Fabian Capitanio, Veterinary and Animal Production Department, University of Naples Federico II, Italy.

Email: fabian.capitanio@unina.it

Summary

Fallow Fields, Falling Incomes: The CAP 2023–2027 Framework in the Italian Cereal Sector

 Analysis of recent Eurostat data shows a progressive decline in EU cereal production. While cultivated acreage has contracted steadily since 2013, the most severe output reduction occurred during 2022–2024, driving a surge in import volumes. This is mirrored in Italy, exposing systemic vulnerabilities within high-value agri-food supply chains amidst geopolitical volatility. Farm profitability has been eroded by a price-cost squeeze: input costs – notably fertilisers and energy – surged, while output prices frequently fluctuated below break-even thresholds. Concurrently, CAP 2023–2027 Eco-schemes have intensified regulatory complexity. Within this framework, Italy's National Strategic Plan implemented standards regarding crop rotation. However, its extensive adoption diluted per-hectare premiums, undermining the CAP's fixed-budget framework. This domestic instability is compounded by exogenous shocks, such as the Covid-19 pandemic and the Russia–Ukraine conflict, which exposed the EU's strategic dependencies and necessitated temporary environmental derogations to mitigate supply security risks. For the post-2027 CAP, resolving regulatory instability is a strategic imperative. A recalibrated synergy between environmental stewardship and the revitalisation of production is essential to safeguard the resilience and global competitiveness of the EU agri-food system.

Champs en jachère, revenus en baisse : Le cadre de la PAC pour 2023–2027 dans le secteur céréaliier italien

 L'analyse des données récentes d'Eurostat révèle un déclin progressif de la production céréalière de l'Union européenne (UE). Si les superficies cultivées se sont contractées régulièrement depuis 2013, la baisse de production la plus marquée a eu lieu au cours des trois dernières années, entraînant une forte augmentation des importations. Ce phénomène se retrouve en Italie, mettant en lumière les vulnérabilités systémiques des chaînes d'approvisionnement agroalimentaires à forte valeur ajoutée, dans un contexte de volatilité géopolitique. La rentabilité a été érodée par le resserrement du ciseau des coûts et des prix: les coûts des intrants – notamment les engrais et l'énergie – ont explosé, tandis que les prix des produits ont fréquemment fluctué en dessous du seuil de rentabilité. Parallèlement, les éco-régimes de la Politique agricole commune (PAC) pour 2023–2027 ont accentué la complexité réglementaire. Dans ce cadre, le Plan stratégique national italien a instauré des normes relatives à la rotation des cultures. Cependant, son adoption à grande échelle a dilué les primes à l'hectare, remettant en cause le cadre budgétaire fixe de la PAC. Cette instabilité interne est aggravée par des chocs exogènes, tels que la pandémie de Covid-19 et le conflit russo-ukrainien, qui ont mis en lumière les dépendances stratégiques de l'UE et nécessité des dérogations environnementales temporaires afin d'atténuer les risques pesant sur la sécurité d'approvisionnement. Pour la PAC post-2027, la résolution de cette instabilité réglementaire est un impératif stratégique. Un rééquilibrage de la synergie entre la gestion environnementale et la revitalisation de la production est essentiel pour préserver la résilience et la compétitivité mondiale du système agroalimentaire de l'UE.

Brachliegende Felder, sinkende Einkommen: Die GAP 2023–2027 im italienischen Getreidesektor

 Die Analyse aktueller Eurostat-Daten zeigt einen fortschreitenden Rückgang der Getreideproduktion in der EU. Während die Anbaufläche seit 2013 stetig geschrumpft ist, kam es im letzten Dreijahreszeitraum zum stärksten Produktionsrückgang. Dies führte zu einem sprunghaften Anstieg der Importmengen. Das spiegelt sich auch in Italien wider und offenbart systemische Schwachstellen innerhalb der hochwertigen Agrar- und Lebensmittelversorgungsketten inmitten geopolitischer Instabilität. Die Rentabilität wurde durch einen Preis-Kosten-Druck geschwächt: Die Inputkosten – insbesondere für Düngemittel und Energie – stiegen stark an, während die Erzeugerpreise häufig unterhalb der Gewinnschwelle schwankten. Gleichzeitig haben die Öko-Regelungen der GAP 2023–2027 die regulatorische Komplexität erhöht. In diesem Rahmen wurden im italienischen Nationalen Strategieplan Standards zur Fruchtfolge eingeführt. Die umfassende Umsetzung dieser Standards führte jedoch zu einer Verwässerung der Prämien pro Hektar und untergrub damit den Rahmen des festen GAP-Budgets. Diese innenpolitische Instabilität erfährt durch exogene Schocks wie die Covid-19-Pandemie und den Russland-Ukraine-Konflikt eine zusätzliche Verschärfung. In der Folge traten die strategischen Abhängigkeiten der EU deutlich zutage, was vorübergehende Ausnahmeregelungen im Umweltbereich erforderlich machte, um Risiken für die Versorgungssicherheit abzumildern. Für die GAP nach 2027 ist die Beseitigung der regulatorischen Instabilität ein strategisches Muss. Eine neu ausgerichtete Synergie zwischen Umweltschutz und der Wiederbelebung der Produktion ist unerlässlich, um die Widerstandsfähigkeit und globale Wettbewerbsfähigkeit des EU-Agrar- und Ernährungssystems zu sichern.