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Short communication

The 7th Italian Agricultural Census: new directions and legacies of the past

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Abstract. The release of the new Italian Agricultural Census shows many features in line with the previous decades and also some novelties, which shall be properly investigated in the upcoming future. The reduction in number of farms was largely announced and in line with the overall declining trend. However, in 2020 the average farm size has grown, showing a slowdown of land abandonment and soil consumption in agriculture and a reorganization of the farm structures. In this paper the main economic, social and functional transformations are analysed, by aggregating some of the most relevant trends in evidence. More in-depth analyses from scholars, stakeholders and policymakers are advocated, with the ultimate goal of highlighting and interpreting the long-term paths of Italian agriculture.

Keywords: farm structures, farm size, on-farm diversification, young farmers, contract services.
JEL codes: Q10, Q12.

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HIGHLIGHTS

- The new Census shows relatively few large professional farms integrated into the global supply chain and many small farms surviving despite their sharp decline.
- Large farms introduce innovations and diversification of activities that become an increasing part of their production and market orientation.
- Italian agriculture still suffers from a lack of a new generation of younger farmers taking over from the older generation.

1. INTRODUCTION

The Agricultural Census contributes to describing, analysing and measuring the overall economic, social and environmental changes occurring in the Italian primary sector alongside the European model of agriculture. It also shows the specificity of agricultural and rural areas as a privileged lab of the interactions amongst the structural changes occurring and the policies.

Many specific dynamics started in the past decades and were caught by the latest Census for different reasons: the growing attention to the environmental aspects of farming, which look at agriculture as both a polluting agent and also as an activity influenced by pollution; the increasing sensitivity of the sector to climate change and the higher frequency of extreme meteorological events; the growing multifunctional role of agriculture and its capacity to produce goods and services different from and conjoined to the primary products (food and fibres); the change in European policies supporting farming activities and putting them back at the centre of market relationships and global economic forces that act directly and indirectly on agriculture.

The primary function of agriculture has deeply and rapidly changed in the last decade, with an ongoing segmentation that is not secondary to what is happening in less mature branches of the economic system, and thanks to which we can see a combination of differentiated products originated in the same territories: from high quality products and designations of origin to products perfectly integrated into the value chains and international markets, organic products, those for niche markets, traditional local products, and so on. Such coexistence is particularly evident moving from the North to the South of Europe and it is also the result of the progressive articulation of the EU agricultural and rural policies from a top-down one-size-fits-all approach to a subsidiary, bottom-up and participatory approach (Ortiz-Miranda *et al*., 2013). This process has progressively allowed Member States to better fit policies to the needs and characteristics of their agricultures and this has been particularly relevant for those countries, mostly in the South of Europe, where the traditional Common Agricultural Policy (CAP) of the past was not fully accessible (Henke *et al*., 2018).

Another relevant consideration is the evidence of an increasing process of on-farm diversification that introduces new elements of analysis and classification in the statistical taxonomy (Van Huylenbroeck, Durand, 2003; Henke, Salvioni, 2008; Henke *et al*., 2014). Such changes involve the whole universe of farms to different extents according to their size, location and specialisation, and their functional role in the agri-food system (Sotte, 2006).

The analysis proposed here does not intend to provide a paramount picture of all the processes and changes occurring in the Italian primary sector, also because at the time of writing only a certain number of data and information are available[1]. We rather focus on three main directions of change, after a general introductive picture of the "new agriculture" emerging from the Census:

1. Economic transformations, looking at the evolution of the connections to markets and to the composition of revenues;
2. Social transformations, in terms of labour, young farmers, new entrepreneurs, age and education of farmers;
3. Functional transformations, looking at on-farm diversification generating income, contract services and digital innovation.

2. THE MAIN PICTURE: CHANGES AND CONTINUITY

At each new Census a wide scientific production attempts to give correct answers to the crucial questions: what are the economic and social roles of contemporary farming? As shown by some distinctive works (Fabiani, Scarano, 1995; Marinelli *et al*., 1998; Arzeni, Sotte, 2014; Russo, 2014), this is not an easy question, mainly because the relatively small number of professional farmers coexists with a large number of non-professional farmers with whom they share the use of land, access to the same family of policies, the production of some public goods and many social and environmental functions. Arzeni and Sotte (2014) used a selected number of variables (economic dimension, yearly workdays, self-consumption and outsourced services) to identify several categories, from small non-professional farms to large professional ones. According to the 6th Census (2010), the former category prevailed in the south and centre of Italy while the latter were concentrated in the north.

The issue of the number of units and their size has always received a lot of interest from scholars and stakeholders. In the latest Census 1,133,023 farms were recorded, with a loss of almost 500,000 units (-30%) (Tab. 1). Such a reduction was largely announced as a turning point of Italian agriculture; however, this is totally in line with what happened in the previous decades. The process of restructuring has been going on for a long time and the real switch can be identified in the first decade of the 21st century (Spinelli, Fanfani, 2012; Arzeni, Pecci, 2012). Overall, in 40 years, more than 2 million farms have vanished, a higher number than the ones survived. At the same time, the slowing down of

[1] The 2020 Census data available at the time of this note can be found, together with a Report by ISTAT, at the following link: https://www.istat.it/it/archivio/274950. For some very relevant topics, such as livestock or other specialisations, the current set of data offers only an instant picture, since there is no comparison with the past. For other issues such as organic farming, smart farming and so on, data are only partially available and reported together with the information on young farmers, whose detailed information is one of the biggest novelties of the Census.

Tab. 1. Evolution of Farms and UAA in Italy.

Year	Absolute figures			Variations on the previous decade			Average size (UAA) (ha)
	Farms (n)	UAA (ha)	TAA (ha)	Farms (n)	UAA (ha)	TAA (ha)	
2020	1,133,023	12,535	16,474	-29.9	-2.5	-3.6	11.1
2010	1,615,590	12,856	17,081	-32.5	-2.5	-9.0	8.0
2000	2,393,161	13,182	18,767	-16.0	-12.3	-13.2	5.5
1990	2,848,136	15,026	21,628	-9.1	-5.1	-3.4	5.3
1982	3,133,118	15,833	22,398	-	-	-	5.1

Source: elaborations on ISTAT data.

the consumption of soil (for alternative uses) and land abandonment (re-naturalisation) can be associated to a process of land consolidation, with fewer but larger units as a result. However, it is quite evident that the whole universe of Italian farms in 2020 does not exclusively include "market-oriented farms", as indicated by the European institutions, but also many small non-market-oriented units, which are mainly residences and hobby farms and that altogether still cover a significant share of the UAA (Matthews, 2021; Giacomini, 2022). While farms up to 10 hectares hold around 20% of the total UAA, a relatively small number of farms larger than 50 hectares (4.5%) hold almost 50% of the Italian UAA.

Between 2010 and 2020 the farm size categories up to 30 hectares all decreased, with different but high percentages: 50% of farms under 1 hectare of UAA are gone, as are 35% of those under 2 hectares. In total, of the around 500 thousand units missing, roughly 380 thousand are smaller than 2 hectares. Looking at the other side of the coin, farms larger than 100 hectares grew by 17%, while those from 50 to 100 hectares grew by 11%. All the categories up to 30 hectares feature a reduction in the number of farms, while the higher size categories show an increase, particularly relevant for the farms over 100 hectares.

The change in the UAA, altogether reaching -2.5%, is in line with the change of the previous decade and much less than the change that occurred in 2000 (-12.3%). Once again, it seems that the last decade is seeing the tail end of a process that started much earlier. The cumulative share of hectares of farms up to 10 hectares equals less than 20%, while it was 24.4% in 2010. The already small amount of land attributed to micro-farms (equal to or less than 2 hectares) almost halved from 2010 to 2020. The highest reduction in the UAA in 2020 is shown in the south of the country, -4%. Overall, the average size of Italian farms increased quite substantially, from 8 to 11 hectares. Despite a generalized increase, the average size hides quite a differentiated picture in different parts of the country: in the north it is quite in line with the size of other European countries and certainly with the European average, while the mainland south is still quite far from that, at 7 hectares.

To complete the picture, it is worth looking at land use, which decreases for all the main categories, included the wood farms and with the only exception being pasture farms (+3.8%). In terms of area, the reduction includes all types of products, with the only exception being arable crops (+2.7%).

The slow professionalization of agriculture also emerges from the change in the legal status of farms: there is a clear increase in corporations (+42%) and a significant increase in partnerships (+15%). However, figures are still quite low, so that individual business and family farms still dominate the sector (93.4%), although in sharp decline (-32%). This is because most of the reduction of farms in the decade is of that category of holdings. At the same time, the share of UAA for these farms is "only" 73% and the reduction equals -7%.

Given this very preliminary description of the main dynamics, what kind of general picture can one draw?

Overall, the restructuring process of the primary sector in Italy is still ongoing, alongside the socio-economic transformation of the country that demands a different and multifunctional role from the primary sector and farmers, but also driven by the process of long-term policy reform.

A very interesting element is the progressive slow reduction of dualism, which has historically characterized the Italian structures, between micro-farms and large farms. Small farms are still a large share of the Italian structures, but their reduction in number coincides also with a different and renovated function for them, from residual and marginal productive structures to mainly residential and hobby farms (Sotte, 2006; Salvioni *et al*., 2010; Arzeni, Sotte, 2014). Large farms are integrated in the supply chain, but they also contribute to the production of secondary goods and services. So, it seems that the relevant dichotomy is no longer about size but rather about economic, social and envi-

ronmental functions. However, the geographical dualism between north and south seems to resist compared with other historical ones: micro vs. large, capitalistic vs. family farms, part-time vs. full-time and so on. Some of the issues characterising past studies seem to have lost importance as analytical categories in favour of others: such as the multifunctional role of agriculture, income diversification and the rate of integration of farms into the supply chain (local, national, international) (Arzeni, Pecci, 2012; De Benedictis, 1992; Fanfani, Montresor, 2000; Mantino, 1995).

In this view, it is interesting to further investigate the changes occurring in Italian agriculture according to the Census following three main directions: economic, social and functional. The availability of data only allows some general considerations that should be further analysed once the full set of data are available, such as the classification according to the economic size or the single farm data. Other issues, such as innovation, digitalisation, environmental aspects would also be very interesting to explore, but at the moment data available do not allow a comprehensive vision of such changes. All in all, the agriculture that stems from the Census only partially overlaps with the latest narration of the sector in society and to a limited extent matches the expectations of the EU about the renovated role of agriculture in contemporary societies, as announced in the Farm to Fork strategy and, in general, in the EU Green Deal. However, it does not fully support other crucial aspects, such as the agri-food Made in Italy, of which the primary sector is a key element. As such, it should be supported by an adequate statistical database able to interpret the ongoing dynamics.

3. ECONOMIC TRANSFORMATIONS

Many aspects about the economic transformations occurring in Italian agriculture can be further investigated once ISTAT releases the data on the economic dimensions of farms. However, some relevant issues of the performance of farms can be observed here, thanks also to the evidence from previous studies.

To start with, the high percentage gaining no revenues at all from any agricultural activity is still quite relevant (Tab. 2), although in reduction when compared with the previous decade. In the 2010 Census, the topic was investigated in a much more direct way, referring to self-consumption (full or a relevant share of the total production); while in 2020, the question was less direct and could create some misinterpretation from the farmers. In any case, a good quarter of the total farms declare not to gain any revenue or receive any support from the policies. Such a share hides quite a substantial difference according to geographical areas, with a share of 13% in the north-east and of over 30% in the centre. Surprisingly enough, the southern regions are not, as in the past, the ones with the highest share of farms without revenues or subsidies.

With regards to the other share of the universe (Tab. 2), all farms record a significant share of revenues from non-agricultural activities or from public subsidies. In the table, for each component of the total revenues the simple mean of the shares of source of farms' revenues is reported. In such a rather complicated way, the Census adds precious information on how relevant each component is in the composition of revenues (take note that the shares do not add up to 100, due to the fact that each column shows the share for the group of farms declaring such a specific source). Among farms declaring to gain revenues from the sales of agricultural products the share goes from roughly 83% in the north to less than 74% in the south. As for the other gainful activities, for farms that take that diversification path the share is quite relevant, from 39% in the north-east to around 45% on the islands. Equally, the average share of subsidies is quite significant everywhere, however it is far more relevant in the south than in the north. This confirms the primary sector to be significantly supported by public policy, no matter the position, size and direct relationships with markets.

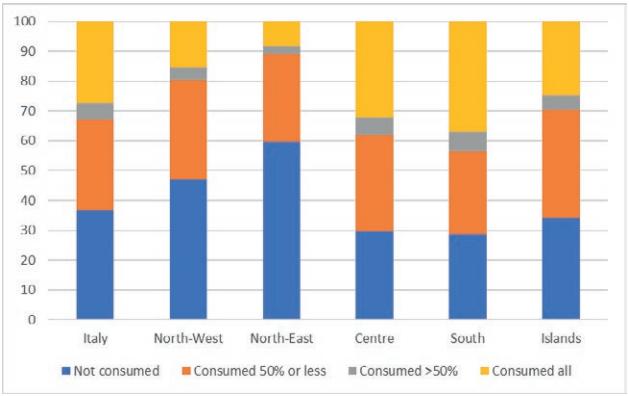
Another element of interest is the share of products consumed within the farms (Fig. 1). This share is particularly high in Italy according to the Census, mostly in consideration of the micro-farms included in it and

Tab. 2. Share of farms with and without revenues and average composition of revenues - 2020.

	No revenues/ subsidies	With revenues/ subsidies	Average composition of revenues*		
			Sales agr. products	Sales other products	Subsidies
North-west	20.3	79.7	82.9	40.2	28.1
North-east	13.4	86.6	83.3	39.1	27.3
Centre	32.3	67.7	72.9	43.8	49.7
South	28.3	71.7	73.7	43.3	60.6
Islands	27.0	73.0	75.0	44.8	46.8
ITALY	25.4	74.6	77.2	41.5	47.7

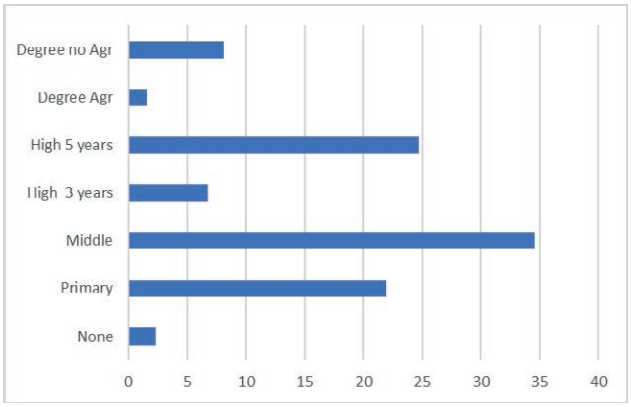
*Each share is the simple mean of the farms declaring a revenue from each of three different sources. Farms can have revenues from all, two or only one of the recorded sources. For this reason, the shares do not add up to 100.
Source: elaborations on ISTAT data.

Fig. 1. Farm composition according to the use of final production – 2020.



Source: elaborations on ISTAT data.

Fig. 2. Share of farms by farm holders' education – 2020.



Source: elaborations on ISTAT data.

often connected to the remoteness of the farms and the rural areas, which only allows for limited regular connections to the markets.

On average, in Italy 27% of farms consume all their products, which means, consequently, that they declare not to have any regular connections to the markets. Conversely, 37% of farms do not at all consume their own products. In between, there is a shady area in which around 36% of farms have "some" relationships with the markets, therefore gaining some revenues from the agricultural activities. This information is quite relevant for the share of farms producing regularly for the markets and integrated into the national and international value chains, which could, at a first glance, amount to about 60% of the total (between 600,000 and 700,000). The remaining units are oriented to residential, self-consumption, hobbyist functions, which if on the one hand do not contribute significantly to the integrated agri-food system, do, on the other, have a relevant role in terms of environmental, territorial and social functions.

Once again, the average scores in Italy are a combination of different features in the different parts of the country: the share of farms fully oriented to self-consumption is particularly high in the southern regions and in the centre, while the highest share fully oriented to production for the markets is in the north-east.

4. SOCIAL TRANSFORMATIONS

With regards to the social changes occurring in the primary sector, rather than trying to cover all the issues emerging from the new Census (such as gender issues, or the presence of foreign workers and rural-urban relationships), we chose to focus only on a few relevant aspects that somehow interlink also with other aspects investigated here: age, education and work force in agriculture.

The element of ageing of Italian farmers is common to other European countries (Cagliero, Novelli, 2012; Cardillo *et al.*, 2022). The reduction in absolute terms of the number of farms managed by young farmers (less than 40 years of age[2]) in the last 20 years also reflects a reduction of the share (from 10.3% in 2000 to 9.3% in 2020), which is probably due to the continuing process of ageing of farmers. This is certainly a bit worrying if one considers the implementation of policies in favour of young farmers and the support offered to new and innovative forms of entrepreneurship in agriculture. Such policies have as a main scope to insert new, more skilled and educated and strongly motivated forces in the primary sector, able to enhance and improve a new entrepreneurship in agriculture and rural areas (Davis *et al.*, 2013; Sargani *et al.*, 2020).

With regard to the education and skills of farm holders, the picture of Italian agriculture does not seem very different from that of the past: around 25% of farm holders do not have any form of education or a primary one; most of them have a "middle school" or "high school" education but few have a degree and even fewer a specialist degree (in agricultural science). This implies that, as in the past, the primary sector is still managed without a specialist education and specific skills coming from proper training are an option, and not a requirement, as in other sectors. Such specificity is to be related to the still high presence of elderly farmers, formally retired.

[2] The threshold of 40 years is traditionally chosen as the limit to access the measures in favour of generational change of the Common Agricultural Policy (CAP).

With regard to on-farm labour, the role of family work is key and predominant over wage-earning labour in Italy, and this is confirmed by the latest Census. However, it emerges that the contribution of the rest of the family (spouse, sons and daughters, others) is less relevant than in the past, concentrating especially on the farm holders. In fact, although some family labour is present in more than 98% of farms, the number of family members involved suffers a significant reduction (-50.3%), as does the total number of days worked by other members (equal to only 22.3% of the family total). This leads to a situation of near equivalence between family and non-family workers, which is reduced by looking at the standard working days, of which only about 30% come from non-family workers (whose contribution is often underdeclared). There is a sort of "professionalisation" of family farms too, so that the days of work of the other components of the family seem limited only to integrating that of the holder and non-family workers. Such a dynamic is very interesting not only for the quality of on-farm work, but also for the evolution of other possible sources of income. This topic will be developed further in the following pages.

5. FUNCTIONAL TRANSFORMATIONS

The first data from the 2020 Census allow us to analyse some strategic dynamics implemented by farms, as a reaction to the need to enhance and protect incomes from market fluctuations, both of final products and intermediate consumption. They are seen as a means of contrasting difficulties due to, on the one hand, the presence of a significant share of elderly farmers among agricultural entrepreneurs; on the other, to the technological challenges imposed by more advanced forms of management, which require both investments and the possibility to access IT technologies.

The diversification of on-farm activities – defined as the aggregation of two types of multifunctional activities: services and secondary conjunct activities – represents one of the most characterizing and significant strategies adopted by Italian farms in recent decades. This emerges not only from the periodical Census (Henke, Povellato, 2012; Fanfani, Sardone, 2017), but also from national agricultural accounts data which estimate the weight of diversification at around 20% of the total value of Italian agricultural production (Sardone, Monda, 2019; ISTAT, CREA, 2022). By 2020, the number of farms with secondary activities shows a decline (-14.5%), following the trend of general reduction, but the weight of diversified farms on the total rises from 4.7% to 5.7%[3]. Therefore, the role of these activities increases, showing how diversification has been able, at least, to contain the reduction of farm units.

There are a total of 21 multifunctional activities of diversification recorded by the Census, among which the most common are: agri-tourism, chosen by 37.8% of diversified farms (up on 2010, +27.4%); contract services, which involves a share of 14.5%, but in sharp decline (-52.2%); the production of energy from renewable sources, which shows a very rapid growth (+200% of farms involved in 10 years), where the solar source represents the most relevant (13.7%), followed by energy produced by biomass (1.8%), mostly located in the northern area; finally, the processing of farm products (first processing and processing of vegetables, milk and meat), although a decline comparable to the general agricultural trend, still ranges from around 8% to 10% of total diversified farms.

The production of renewable energies, although growing rapidly in all areas, still has a very unbalanced geographical spread, as shown by the fact that the south and islands count just 16.5% of farms equipped with solar plants, both for supplying internal demand for energy and/or for selling, while being the areas that can benefit from the greatest periods of sunshine.

In general, the territorial distribution of diversification does not follow that of farms; indeed, about three quarters of Italian farms with at least one multifunctional activity are in the northern and central area (Tab. 3). While in the north-west and north-east these activities involve 12% and 10.3% of total farms, the weight of diversification drops to just 2.4% and 3%, in the south and on the islands. The diversification processes, therefore, offer a dichotomic picture, with the central-northern area, more advanced, and the southern area less able to seize the opportunities coming from alternative production paths for strengthening and stabilizing the farm income (Aguglia *et al*., 2009).

It is to be noted that the diversification functions exceed the number of diversified farms (+32%), since several activities can be carried out simultaneously within the same unit. These different activities can be reorganized into two macro aggregates (van der Ploeg, Roep, 2003; Henke, Povellato, 2012): the "deepening" activities that keep together the closest and more interlinked functions to the proper agricultural business (such as on-farm processed and prepared food) and the "broadening" activities, for which there is a distance from the traditional agricultural activities (such as agri-tourism or other on-farm recreational activities). On the national

[3] It is worth noting that for farms run by owners under 40 years of age the share doubles (11.6%).

Tab. 3. Farms with activities of diversification - 2020.

	Farms with at least one diversified activity		% Farms with diversification on total farms	Functions		% Distribution of functions		
	Number	% Distribution		Number	% Distribution	Deepening	Broadening	Others
North-west	13,697	*21.0*	*12.0*	18,373	*21.4*	*28.5*	*62.7*	*8.8*
North-east	19,369	*29.7*	*10.3*	26,424	*30.8*	*25.6*	*65.9*	*8.4*
Centre	15,266	*23.4*	*8.5*	19,654	*22.9*	*21.1*	*73.0*	*5.8*
South	11,022	*16.9*	*2.4*	14,112	*16.5*	*35.3*	*55.3*	*9.4*
Islands	5,772	*8.9*	*3.0*	7,222	*8.4*	*35.7*	*51.5*	*12.8*
ITALY	65,126	*100.0*	*5.7*	85,785	*100.0*	*27.7*	*63.9*	*8.5*

Source: elaborations on ISTAT data.

average, the deepening activities saw their weight dropping to 27.7%, against 38.6% in the previous decade. Conversely, the broadening activities rose to around 64%, compared to 58.1% in 2010. In this context, the southern area remains grounded on the more traditional diversification processes that have been present for a long time.

In the opposite direction to diversification, we find disactivated farms that outsource all or part of their management to external parties, who operate on behalf of the landowner/holder (Arzeni, Sotte, 2014). The total number of farms employing contract services has been declining over time, pushed down by both the progressive exit of small farms, whose size often limits the possibility of making investments in innovative machinery and technologies, and the lack of a generational change in many farms run by elderly farmers, who have used such services for postponing the (inevitable) exit from professional farming.

In 2020, farms run under contract services accounted for 27.6% of the total; a figure considerably lower than that recorded in 2000 (51%) and declining in comparison with 2010 (33.3%). The use of external services is very different among geographical areas: in the north-east over 45% of farms outsource tasks to external professionals, while in the south only 22% of farms adopt this mode of management, using considerably fewer average hours. The main part of the hours worked (58%) is provided by professionals, with higher shares in the north and centre, whereas in the south over half of the total hours are provided by other farms supplying agricultural services, within the above-mentioned diversification processes.

However, in the last decade the area fully managed by contractors increased, as a national average, from 6.2% in 2010 to 9.6% in 2020 (equal to 1.2 million hectares), with peaks close to 14% and 11% in the north-east and centre but falling to 7% in the south. Even the areas under "partial management" show an increase in UAA involved by one or more external operations (+12% on 2010). The composition of the functions (hectares) changes over the period: harvesting and first processing remain dominant, despite declining from 60% to 48%; fertilization and "other processes" gain in importance, witnessing an evolution in the needs expressed by farmers, likely related to other evolutions occurred in the meantime (such as the reinforcement of farm machinery).

A further element characterising farms and the gap between the north and south is the propensity of farms to invest in technological innovations. The Census data are a novelty of this survey and refer to investments in the period 2018-2020. As a national average 11% of farms have introduced new technological or management solutions, a figure that doubles in the northern areas (rising to around 22%) and drastically decreases in the south (around 6%). The relevance of farms with innovations rises rapidly as the size increases – expressed in Annual Working Units (AWU) –, reaching the national average of 58% for farms with more than 10 AWU, a share that rises to around 70% in the north.

Most of the recorded innovations are in the category of mechanization, well over 50% of farms in all areas, with the only exception of the islands. In general, the innovations adopted mainly involve certain types of crop operations (planting and sowing, soil tillage and irrigation, between 23% and 17%), but also the renovation of buildings (13%). Managerial innovations or those linked to sales and/or marketing involve fewer farms (7.6% and 5.5%), in both cases with a rather homogenous distribution among regions.

During the 2000s, the emphasis placed on digitalisation in agriculture has grown considerably, as an essential tool for helping farms towards more sustainable management models. The 2020 Census indicates that 15.8% of Italian farms are equipped with IT, compared to 3.8% in 2010 and about 1% in 2000, with a very signifi-

cant growth that almost everywhere sees the total number of farms triple or more. Here again, territorial differences are relevant: in the north, computerisation involves a more than double share of farms (33%), the centre ranks on the national figure, while in the south the share is half the average. It follows that many of the computerised farms are in the north (55.8%) – especially in the north-east (34.8%) – and the remainder are divided between the centre (16%), south (17.3%) and islands (11%).

It is worth underlining that the importance of digitalisation is greater in larger farms, expressed in terms of AWU. In fact, in farms with over 10 AWU, computerization involves more than 78% of Italian farms (the same share falls to less than 9% for farms with less than 1 AWU). The same share rises to 90% for the northern area, while in the south less than two thirds of units in the same size category are equipped with IT. In summary, larger Italian farms, and especially northern ones, seem better equipped to take advantage of management innovation opportunities arising from IT endowments.

6. CONCLUDING REMARKS

The release of a new Census is not only an opportunity to investigate the structural evolution of an economic sector, given how fast the changes in economic systems occur, but also an occasion to discuss about what is the real object of investigation, what are the interlinks among the different components, what is relevant to the sector in order to design and enhance the more appropriate public policies.

With the publication of the preliminary data of the 2020 Census, a few relevant issues emerge, which will require a more in-depth and wider discussion among scholars, civil servants and stake holders.

First of all, the reduction in the number of small and micro units confirms an ongoing trend that reached its peak in the previous decade. Such a trend affirms the double nature of Italian farms: a relatively small number of large and professional units that are integrated into the global supply chain; a relatively large number of small farms that survive despite their sharply declining trend but have less or nothing to do with markets and are not business-oriented, being rather residences or hobby farms mostly or exclusively devoted to self-consumption. Even if micro farms are relevant in avoiding marginalisation of territories and land abandonment, it is the larger farms that contribute significantly to the multifunctional and diversified activities, and to the diffusion of innovations, in a way that becomes relevant for the sector as a whole. For micro and small farms, the physical size is often a constraint to grow and develop new activities, together with the entrepreneurial skills and the lack of a new generation taking over the farm management.

Diversification, although relevant in some cases and in some territories (for example, agri-tourism and energy production) is not booming as was expected and is still limited to a small number of farms. This is partly due to some size constraints, partly to the external socio-economic conditions, partly also to the missed generational change in agriculture, something that was largely announced and desired, but has not happened in significant numbers. There are certainly many virtuous experiences and some very successful ones, but it does not seem to be the rule, especially in the south, despite the way change in agriculture is often narrated and advocated by policy makers.

Of all the existing and traditional dichotomies within the Italian primary sector, the one still clearly represented by the new Census is the north-south one, in terms of size, functions, innovativeness, integration in the supply chain, and so on. Years of convergence policies and specific sectoral policies have not yet filled the gap, which has actually grown larger and presented new challenges (as in technology).

Finally, do we obtain the right picture of the primary sector from the Census? Does it catch all the dynamics, the many transformations it is going through and especially the necessary reshaping required by the new CAP and the main strategies of the European Union? To answer the question properly, more detailed information at the sub-regional level and innovative data integration are necessary. In conclusion, another more general question arises: what kind of Census do we really need? The answer comes from ISTAT itself, when the Italian Statistical Institute announced the end of the decennial survey and introduced the so-called Continuous Census. Such an innovation in the surveys should help to draw a clearer and more in-focus picture of such a dynamic sector, and to better represent the paths of economic, social and functional transformations that have already clearly emerged in the overall picture of Italian agriculture.

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