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Italy

Exporter Guide

Italy Exporter Guide 2017

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Report Highlights:
This report offers information for U.S. companies interested in exporting food and agricultural products to Italy, including an overview of the country's economic situation, market structure, export requirements, and best product export opportunities.

Post:
Rome

Executive Summary:

Author Defined:
Section I. Italian Market Overview

Macro-Economic Situation & Key Demographic Trends
Italy has a diversified industrial economy, divided into a developed industrial north and a less-developed agricultural south, with high unemployment. The Italian economy is driven in large part by the manufacture of high-quality consumer goods produced by small and medium-sized enterprises, many of them family owned. Italy is the third-largest economy in the euro-zone, but exceptionally high public debt burdens and structural impediments to growth have rendered it vulnerable to scrutiny by financial markets. Italy's GDP is estimated at $2.2 trillion and it has a per capita GDP of $36,800. Italy has few natural resources, with much land unsuited for farming. Being a net agricultural importer, most raw materials and ingredients are imported, as Italy's economic strength is in the processing and the manufacturing of goods. Italy exports mainly consumer products to the United States, while the United States exports mostly bulk commodities to Italy.

U.S.-Italian Agricultural Trade
In 2016, U.S. agricultural, fish, and forestry exports to Italy were $1.1 billion. U.S. imports from Italy reached $4.4 billion. The United States exports bulk and intermediary products to Italy, such as wheat, soybeans, hides and skins, hardwood lumber and planting seeds. Quantities exported in a given year can fluctuate widely depending on the internal European feed grain and wheat supply and demand situation as well as external competitive factors with third country suppliers. Products are processed into high value items such as cured meats and cheeses, pasta, shoes, and furniture, which are then re-exported to the United States.

Bilateral Ag Trade 2016 (Food, Fish and Forestry)

Total U.S. Exports to Italy: $1.1 billion	**Total U.S Imports from Italy:** $4.4 billion
U.S. leading exports to Italy	**Italian leading exports to the U.S.**
Tree nuts: $290.8 million	Wine and Beer: $1.875 billion
Wheat: $105.8 million	Olive oil: $580 million
Forest products: $97.7 million	Cheese: $307.2 million
Fish products: $93.2 million	Snack foods: $161.1 million
Beef and beef products: $60.3 million	Processed Red meats: $113.9 million
Hides & Skins: $57.9 million	Forest products: $98.7 million
Planting seeds: 56.8 million	Coffee: $101.4 million

- Italy is a major food processor and a net agricultural importer
- U.S. exports mostly bulk commodities to Italy
- Italy exports mainly consumer products to the United States

Italian Agriculture

Agriculture is one of Italy's key economic sectors, accounting for 2.3 percent of GDP. Italy's agriculture is typical of the northern and southern division found within the European Union (EU). The northern part of Italy produces primarily grains, soybeans, meat, and dairy products, while the south specializes in fruits, vegetables, olive oil, wine, and durum wheat. Even though much of its mountainous terrain is unsuitable for farming, approximately 4 percent of the population is employed in farming. Most farms are small, with the average size being only seven hectares. Italy has a diversified industrial economy with roughly the same total and per capita output as France or the United Kingdom. Italian industries, including the food-processing sector, rely heavily on imports of raw materials. Italy is one of the largest agricultural producer and food processors in the EU.

Italy’s major agri-food trading partners are other EU Member States, with France and Germany each accounting for slightly less than a fifth of the total. Italy’s leading agri-food exports are wine, pasta, olive oil, cheeses, and fruits and vegetables. The export market drives the Italian food-processing sector. However, exchange rates play a critical role outside the EU. Italy has invested heavily in a “Made in Italy” strategy to build consumer loyalty to weather exchange rate fluctuations. Although products with geographic indications represent only a small fraction of the total value of Italian food production, they play a major role in Italy's national food export marketing strategy to portray its products as 'high quality and Italian”.

Population & Language

Italy has a population of roughly 62 million. Italian is the official language and is spoken in all parts of Italy, although some minority groups in the Alto Adige and Aosta regions speak German and French, respectively. Correspondence with Italian firms, especially for an initial contact, should be in Italian. If a reply comes in English then the subsequent correspondence with the Italian firm can be in English. The use of Italian is not only regarded as a courtesy, but assures prompt attention, and prevents inaccuracies that might arise in translation. Most large commercial firms are able to correspond in various languages in addition to English and Italian, but a business overture or proposal is given more serious attention if written in Italian.

Labor

Unemployment is a regional issue in Italy -- low in the north, high in the south. In 2016, overall unemployment was 11.7%, but youth unemployment remained high at 37.1%. Persistent concerns about inadequate infrastructure, corruption, and organized crime have adversely affected investment and job creation in the south. A significant underground economy absorbs a substantial number of people, but they work for low wages and without standard social benefits and protections. Women and youth have a significantly higher rate of unemployment than do men.

Italian Importers

Italian importers are usually small to medium-sized companies, rather than the large, market-dominating types found in northern Europe. Consequently, these companies import smaller volumes and a broader range than their much larger European counterparts do. Most imported food products enter the Italian market through brokers or specialized traders. Price is always important, although quality and novelty alone do move some imported products. Imported products from North America often enter Italy indirectly from the Port of Rotterdam or directly by air. Processed food is primarily distributed through retail grocers, convenience stores and discount grocers.

Advantages and Challenges for U.S. Exporters in Italy

Advantages	**Challenges**
High consumer interest in new products.	Competition from similar food products produced in other EU countries that enter tariff free.
The tourism industry increases demand for hotel, restaurant, and institutional products.	Price competition is fierce.
U.S. products are viewed as "trendy, new and innovative," especially those with added benefits of health and lifestyle.	Strong cultural presumptions that Italian food products are superior to those of foreign suppliers.
Growing niche market for ethnic foods. Italians are traveling more, becoming aware of foreign cuisines.	Supermarket and hypermarket shelf space and product placement is expensive. Therefore, relationships with Italian trade contacts and channels of distribution are critical for marketing the product.
Exchange rate fluctuations can affect imports of U.S. products.	Mandatory customs duties, sanitary inspections, and labeling requirements can be onerous.
U.S. fast food chains, theme restaurants, and the food processing industry often request U.S. origin ingredients.	In-grained political opposition to modern biotechnology, which leads distribution chains to avoid GMO products.

Section II. Exporter Business Tips

Trade Regulations, Customs and Standards

As a member of the EU, the Common Agricultural Policy (CAP) governs Italy's agricultural sector. Similarly, Italy employs the same tariffs and border measures as the other EU member states. Products imported into Italy must meet all Italian and EU food safety and quality standards, as well as labeling and packaging regulations. It is important to work with experienced importers, and/or have an agent to work with Italian regulatory authorities to ensure the acceptability of specific products. Personal relationships and language ability are of value when conducting business transactions. It is

also advisable for the agent to contact health authorities at the port of entry as interpretation of health directives may vary from port to port.
For more information on Food and Import Requirements, please see Post's latest report at: https://it.usembassy.gov/embassy-consulates/rome/sections-offices/fas/

Market Entry Strategies

Market entry strategies for U.S. products intending to enter the Italian market should include:

- Market research in order to assess product opportunities
- Advanced calculations of the cost of introducing the product in the Italian market, in order to prove its competitiveness in the local market.
- Experienced distributor or independent reliable agent to counsel on import duties, sanitary regulations and labeling requirements.
- Information on the purchasing arrangements of the larger retail channels.

Section III. Market Sector Structure and Trends

The Italian Food Retail Sector

Italian retail chain outlets have started to make their own purchasing decisions. Success in introducing your product to the Italian market depends on acquiring local representation and personal contact. The advantages of local representation include up to date market knowledge and guidance on business practices and trade law, sales contacts, and market development expertise. Finding the right Italian agent, distributor, or business partner is, therefore, essential to enter the Italian market. It is usually not effective to rely on agents or distributors in neighboring markets, (since despite the existence of the EU common market), the Italian market remains very individual.

Italy's food and drink market is very mature, and remains relatively unconsolidated, and dominated by medium-sized, privately owned companies. Many Italian consumers have a strong bias towards well-known and long-established brands, making market entry difficult and limiting opportunities for revenue growth. A strong food culture means that Italy has one of the highest levels of per capita spending on food in the world, spending more than 20 percent of their disposable income on food, beverages, and tobacco. However, over the last decade, consumption has been adversely impacted by both relatively low economic growth and unfavorable demographics.

There are approximately five million foreign residents in Italy. Food retail outlets have begun to cater to these consumers with more foreign and ethnic foods, but these offerings remain small in the face of traditional Italian cuisine. With Europe's Muslim population growing rapidly, halal butcher shops and restaurants are becoming more commonplace, and there is an increased crossover between Muslim and non-Muslim cuisine. More than 1 million Muslims now live in Italy, and, according to reports, halal foods are making inroads into the local cuisine alongside North African and Middle Eastern spices.

Continuing tendencies toward smaller families, later marriages, and an increasing number of women in the workforce are resulting in food retail outlets offering more ready-made, ready-to-serve products and a wider range of products.

Italian households still prefer fresh rather than frozen and frozen to canned food, as shopping frequency is greater in Italy than in many other European markets.

The Italian grocery retail sector is one of the most fragmented and least saturated in Western Europe and many of the leading brands exist as networks of smaller companies. Most of the supermarkets, hypermarkets, and large shopping malls are mainly located in the North of Italy, while the south continues to lag behind with fewer retail outlets and a still underdeveloped distribution network. Large retailers have started to source products from buying groups who can ensure better deals with suppliers, while some large food retailers have decided to join buying groups to increase their advantage when dealing with suppliers. Although buying groups are largely the domain of large chain food retailers, independent retailers have started to understand their value. A number of large multinational retailers have either merged or made acquisition agreements with local Italian players to assimilate expertise and navigate strict Italian regulations.

Discount retailers are slowly emerging in the Italian market, but have had to modify their market approach by catering to Italian consumer preferences. Hard discounting in the past has proven not to work in Italy but by modifying their image and offering a mix of branded and private label products they seem to have made inroads with the Italian consumer. Private label products have also seen a surge in acceptance by Italian consumers. Each retailer has begun to offer a variety of private label food products, targeting different types of consumers, especially in the organic or typical regional categories. The two most important foreign retailers currently present in Italy are Carrefour and Auchan. Auchan has chosen to enter the Italian market with various formats; hypermarkets, supermarkets, department stores, variety stores and hardware stores, while Carrefour's formats include hypermarkets, supermarkets and convenience stores, with supermarkets being their best performer. For more information on the Italian Food Retail and Distribution Sector, please see Post's latest report at: https://it.usembassy.gov/embassy-consulates/rome/sections-offices/fas/

The Italian Hotel and Food Service Industry

Every year almost 50 million tourists visit Italy, making it the world's fourth most attractive tourist destination. The Italian hotel and food service industry is a lucrative and growing sector (it is the second largest in the world after the United States); however, it is also diverse and fragmented. It is dominated by many small establishments, bed and breakfasts, youth hostels, camping parks, resorts and rural tourism locations belonging to foreign investors.

Most imported food products enter the Italian market through brokers or specialized traders. Imported products from North America often enter Italy indirectly via the Netherlands' Port of Rotterdam or directly by air. Wholesalers are the main customers for fish and seafood products, as they purchase and distribute to numerous small restaurants and hotels. Most of the processed food and raw material sourcing decisions are made directly by the restaurant chef and/or hotel Food Purchasing Director. Restaurants, hotels, and catering companies tend to rely on importers, wholesalers, and food manufacturers, while trattorias and pizzerias purchase directly from large retail food outlets. While there are Category Associations for the Hotel and Food Service sectors, each establishment operates independently when it comes to sourcing decisions.

Changing Italian lifestyles, with more workers now forced to spend their lunch hours outside of the home due to either longer commuting times or shorter lunch breaks, have given a boost to the food service industry. Italy is slowly moving towards trends and lifestyles seen in other European countries, and it is forecast that an increasing number of consumers will eat out during their lunch breaks and possibly also for their evening meals because of their jobs, long working hours and business meetings. Although the trend is toward shorter lunch breaks, it is unlikely that most Italians will eat lunch at their desks. Italians still prefer leaving the office for a quick bite. For more information on the Italian Food Service - Hotel Restaurant Institutional sectors please see Post's latest report at: https://it.usembassy.gov/embassy-consulates/rome/sections-offices/fas/

Section IV. Best High Value Product Prospects

The consumer food/edible fishery and forestry products that offer the best U.S. export opportunities are as follows:

Commodity	**Imports 2016 $**	**Imports from U.S. $**	**2012-2016 Average annual import % growth**	**Key constraints over market development**	**Market attractiveness for the U.S.**
Pork meat	2.2 billion	893,912	+44.8	Competition from other EU countries.	Increasing domestic consumption.
Beer	611 million	2.5 million	+64.3	Competition from EU countries. Transport costs and time.	Although the Italian drinking culture has always been focused on wine, things have been changing recently. The beer market is growing with increased imports, new breweries and pubs where high quality beer is served at reasonable prices.
Soybeans	595 million	131 million	+111.2	Competition from Brazil.	Growing demand from the Italian feed industry.
Wine	335 million	42.3 million	+0.1	Competition from Italy and	The United States is the fourth largest wine producing

				other EU countries.	country in the world after Italy, France, and Spain. American wines offer great value, with prize-winning vintages at reasonable prices, and are increasingly available in Italy and Europe.
Chocolate	313 million	196,973	+60.3	Competition from other EU countries.	Growing demand from manufacturers, confectionary and snack industry.

Section V. Key Contacts

USDA FAS Contact in Rome, Italy
Office of Agricultural Affairs,
Foreign Agricultural Service,
American Embassy, Via Veneto 119a
Rome, 00187, Italy
Webpage: https://it.usembassy.gov/embassy-consulates/embassy/sections-offices/fas/
E-mail: agrome@fas.usda.gov
Tel: (011) (39) 06 4674 2396
Fax: (011) (39) 06 4788 7008

Principle Business Associations and Italian Ministries

American Chamber of Commerce in Italy, which is based in Milan: www.amcham.it.

Confindustria: The Confederation of Italian Industries is a principal trade association acting as an umbrella organization covering numerous industry trade associations: www.confindustria.it

UnionCamere: Italian union of the chambers of commerce, industry, handicraft and agriculture. Umbrella organization responsible for all chambers of commerce in Italy: www.unioncamere.gov.it

Federalimentare: The federation for the Italian food industry is a highly influential organization in Italy's agricultural and food processing sector: http://www.federalimentare.it

Ministero delle Politiche Agricole Alimentari e Forestali: Italian Ministry of Agriculture: www.politicheagricole.it

Ministero della Salute: Italian Ministry of Health: http://www.salute.gov.it

Appendix A. Key Trade and Demographic Information - Italy 2016

Agricultural, Fish/Forestry Imports from the United States: $1.1 billion
Consumer Food Imports from the United States: $497.7 million
Fish and Seafood Imports from the United States: $93.2 million
Italian Population: 62 million
Total Urban Population: 40 Million
Total Rural Population: 20 Million
Foreign Population: 5 million (approx.)
Gross Domestic Product: $2.234 trillion
Per Capita Gross Domestic Product: $36,800
Unemployment Rate: 11.7percent
Per Capita Food Expenditures (U.S. Dollars) $2,500
Labor Force: 26 million
Percent of Female Population Employed 49 %
Exchange Rate: EURO per U.S. Dollar Average 2016: € 0.9214 = $1.00

Source: BICO, ISTAT, Global Trade Atlas, and European Central Bank

Italian Map, Local Time, Holidays and Key Contacts

Local Time

The time zone for Italy is 6 hours ahead of U.S. Eastern Standard Time.

Holidays

Italian holidays must be taken into account when planning to do business in Italy. July and August are not good months for conducting business in Italy, since most business firms are closed for vacation during this period. The same is true during the Christmas and New Year period.

Holidays observed in Italy for 2018:

Jan 1	Monday	New Year's Day	National holiday
Jan 6	Saturday	Epiphany	National holiday
Mar 30	Friday	Good Friday	Observance
Apr 1	Sunday	Easter Day	National holiday
Apr 2	Monday	Easter Monday	National holiday
Apr 25	Wednesday	Liberation Day	National holiday
Apr 25	Wednesday	The Feast of St. Mark	Local holiday
May 1	Tuesday	Labor Day / May Day	National holiday
Jun 2	Saturday	Republic Day	National holiday
Jun 24	Sunday	The Feast of St. John (Florence, Genoa, Turin)	Local holiday
Jun 29	Friday	The Feast of St. Peter and St. Paul (Rome)	Local holiday
Aug 15	Wednesday	Assumption of Mary / Ferragosto	National holiday
Sep 19	Wednesday	The Feast of Saint Januarius (Naples)	Local holiday
Nov 1	Thursday	All Saints' Day	National holiday
Dec 7	Friday	The Feast of St. Ambrose (Milan)	Local holiday
Dec 8	Saturday	Feast of the Immaculate Conception	National holiday
Dec 25	Tuesday	Christmas Day	National holiday

Dec 26	Wednesday	St. Stephen's Day	National holiday
Dec 31	Monday	New Year's Eve	Observance

Table B. Consumer Food & Edible Fish Product Exports and Imports

Linking U.S. Agriculture to the World FAS

U.S. Exports of Agricultural & Related Products to *Italy(*)*
CY 2010 - 2016
(in millions of dollars+)

GATS Global Agricultural Trade System Online

Export Market: *Italy(*)*

Product	2010	2011	2012	2013	2014	2015	2016	%Chg
	Calendar Years (Jan-Dec)					Comparisons		
Bulk Total	217.0	253.2	207.9	335.5	217.6	323.4	251.8	-22.2
Wheat	144.0	160.6	130.0	215.5	163.3	250.7	105.8	-57.8
Corn	0.0	7.6	0.0	0.4	0.0	0.0	0.7	-
Coarse Grains (ex. corn)	0.0	10.1	0.0	12.5	0.0	0.0	0.0	-
Rice	0.0	0.2	0.8	1.0	0.6	0.5	1.1	117.8
Soybeans	36.0	0.7	35.6	54.2	0.1	18.5	77.9	321.2
Oilseeds (ex. soybean)	0.0	0.2	0.2	0.0	0.1	0.0	0.0	123.2
Cotton	13.0	37.4	10.6	5.2	5.8	8.1	3.4	-57.6
Pulses	15.0	26.1	17.6	26.5	29.2	31.6	34.7*	9.7
Tobacco	2.0	2.1	1.7	3.6	1.7	1.8	21.4	1097.6
Other Bulk Commodities	7.0	8.2	11.4	16.4	16.6	12.3	6.9	-43.9
Intermediate Total	185.0	255.0	196.2	262.1	302.5	197.2	166.6	-15.5
Soybean Meal	10.0	8.9	33.7	119.8	125.9	35.4	0.3	-99.3
Soybean Oil	0.0	0.2	0.3	0.0	0.0	0.0	0.2	1131.5
Vegetable Oils (ex. soybean)	17.0	19.0	16.7	13.9	6.6	3.8	2.5	-34.5
Animal Fats	0.0	0.1	0.1	0.0	0.0	0.1	0.0	-
Live Animals	3.0	1.0	0.5	0.4	0.2	0.1	0.4	400.1
Hides & Skins	84.0	125.9*	61.8	59.9	64.2	51.3	57.9	12.9
Hay	0.0	0.0	0.0	0.1	0.3	0.1	0.3*	153.0
Distillers Grains	0.0	3.1	0.0	0.0	0.0	0.0	0.0	-
Feeds & Fodders NESOI	3.0	8.6	4.4	5.0	8.1	8.5	6.8	-19.8
Planting Seeds	32.0	38.2	39.1	32.5	57.9	59.3	56.8	-4.2
Sugar, Sweeteners, Bev. Bases	0.0	0.4	0.8	4.7*	1.0	0.9	0.9	-4.1
Other Intermediate Products	36.0	49.7*	38.8	25.8	38.4	37.7	40.6	7.6
Consumer Oriented Total	316.0	365.1	351.8	477.6	555.9*	479.9	497.7	3.7
Beef & Beef Products	32.0	63.4	58.0	68.3	78.4*	72.9	60.3	-17.4
Pork & Pork Products	5.0	2.2	0.7	1.2	1.1	1.0	2.0	101.7
Poultry Meat & Prods. (ex. eggs)	1.0	1.1	0.5	1.3	0.2	0.1	0.2	79.1
Meat Products NESOI	0.0	0.8	0.3	0.2	0.6	0.5	0.6	39.0
Eggs & Products	1.0	0.9	3.2	2.4	2.3	1.1	1.3	16.7
Dairy Products	2.0	1.2	0.9	1.6	1.2	1.0	1.7	64.8
Fresh Fruit	0.0	0.6	0.1	0.1	0.0	0.0	0.1	175.9
Processed Fruit	20.0	14.4	13.2	15.4	14.0	15.8	18.9	19.7
Fresh Vegetables	1.0	0.4	0.4	0.3	0.3	0.1	0.4	196.1
Processed Vegetables	37.0	27.4	45.9	72.3	95.0*	33.9	64.7	91.1
Fruit & Vegetable Juices	1.0	3.1*	2.0	2.0	0.8	0.4	0.6	28.0
Tree Nuts	140.0	177.2	164.7	236.3	286.5	289.3	290.8*	0.5
Chocolate & Cocoa Products	0.0	0.7	0.2	0.2	0.3	0.1	0.3	220.2
Snack Foods NESOI	4.0	3.9	4.8*	4.0	4.0	3.2	3.4	4.6
Breakfast Cereals	0.0	0.2	0.0	0.0	0.0	0.0	0.0	-53.4
Condiments & Sauces	2.0	1.9	2.2	2.1	1.5	0.8	2.9*	246.3
Prepared Food	4.0	4.5	5.2	9.6	8.8	9.5	9.4	-1.4
Wine & Beer	56.0	49.7	40.1	51.2	53.2	43.7	36.3	-17.0
Non-Alcoholic Bev. (ex. juices)	5.0	5.9*	2.3	1.7	1.0	1.5	1.6	3.2
Dog & Cat Food	4.0	5.0	6.7	7.2	6.5	4.2	2.0	-52.1
Other Consumer Oriented	1.0	0.8	0.3	0.2	0.2	0.4	0.2	-48.8
Agricultural Related Products	310.0	283.1	220.3	265.6	293.8	265.4	217.2	-18.1
Distilled Spirits	33.0	31.8	28.5	25.7	30.3	24.7	26.1	5.9
Ethanol (non-bev.)	0.0	0.0	0.0	0.2	0.2	0.0	0.0	7.9
Biodiesel & Blends > B30	0.0	2.1*	0.0	0.0	0.0	0.0	0.1	-
Forest Products	189.0	161.4	113.1	159.9	169.0	152.2	97.7	-35.8
Fish Products	88.0	87.8	78.7	79.8	94.3*	88.4	93.2	5.4
Agricultural Products	717.0	873.2	755.9	1,075.1	1,075.9	1,000.5	916.2	-8.4
Agricultural & Related Products	1,027.0	1,156.3	976.2	1,340.7	1,369.6*	1,265.9	1,133.4	-10.5

U.S. Imports of Agricultural & Related Products from *Italy(*)*
CY 2010 - 2016
(in millions of dollars+)

Import Supplier: *Italy(*)*

Product	2010	2011	2012	2013	2014	2015	2016	%Chg
	Calendar Years (Jan-Dec)					Comparisons		
Bulk Total	26.0	24.8	28.9	20.8	26.4	25.5	29.8	16.6
Wheat	0.0	0.2	0.2	0.4*	0.3	0.2	0.4	46.6
Coarse Grains	0.0	0.0	0.0	0.0	0.0	0.0	0.0	159.8
Rice	10.0	14.5	12.3	10.8	15.2	14.9	16.6*	11.6
Tobacco	13.0	5.0	8.9	4.4	5.0	3.1	4.1	28.8
Rubber & Allied Products	0.0	0.2	1.0*	0.2	0.3	0.3	0.5	37.4
Coffee, Unroasted	1.0	0.6	2.1	1.1	0.6	0.6	0.6	3.4
Cocoa Beans	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-50.2
Tea, Incl Herb	2.0	3.3	3.7	3.0	4.0	5.5	4.5	-17.9
Raw Beet & Cane Sugar	0.0	0.0	0.0	0.1*	0.0	0.0	0.0	-
Other Bulk Commodities	1.0	1.0	0.5	0.6	0.9	0.8	3.1	279.8
Intermediate Total	573.0	615.5	638.6	669.3	685.1	689.2	710.6	3.1
Tropical Oils	0.0	0.0	0.0	0.0	0.0	0.0	0.1*	126.2
Other Vegetable Oils	509.0	544.3	547.5	575.5	559.7	549.0	580.3	5.7
Feeds & Fodders	5.0	3.5	8.0	7.2	10.3*	7.8	5.6	-28.1
Live Animals	0.0	0.3	0.4	0.1	0.3	1.4	0.4	-69.5
Hides & Skins	0.0	0.4	0.2	0.5	0.3	0.3	0.4	33.4
Planting Seeds	5.0	5.9	9.7	9.4	11.5	12.1	13.6*	12.4
Sugars, Sweeteners, Bev Bases	1.0	2.3	1.8	3.2	3.7*	2.5	3.0	20.4
Essential Oils	20.0	18.5	18.4	18.0	30.3	25.5	30.4*	19.3
Cocoa Paste & Cocoa Butter	5.0	5.6	6.4*	5.3	4.6	4.8	3.2	-32.0
Other Intermediate Products	28.0	34.7	46.2	50.1	64.4	85.8	73.5	-14.4
Consumer-Oriented	2,339.0	2,746.5	2,831.1	3,056.3	3,315.3	3,362.8	3,527.3*	4.9
Snack Foods	114.0	132.0	129.1	150.5	153.6	154.7	161.1*	4.1
Red Meats, FR/CH/FR	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Red Meats, Prep/Pres	62.0	71.8	86.7	97.3	114.3	120.0	113.9	-5.1
Cheese	277.0	311.5	301.3	309.7	307.4	303.8	307.2	1.1
Other Dairy Products	27.0	35.5	44.6	42.7	42.6	53.5	54.4*	1.6
Other Fresh Fruit	16.0	23.1	25.9	36.1	48.7	41.7	54.8*	31.3
Fresh Vegetables	1.0	5.5	9.4	8.9	9.8	13.2	20.3*	53.3
Processed Fruit & Vegetables	48.0	55.3	66.9	66.7	80.4	82.1	104.2*	26.9
Fruit & Vegetable Juices	10.0	20.9	22.3	29.6	39.5	47.3	41.1	-13.0
Tree Nuts	9.0	11.6	16.1	17.3	25.9	32.7	20.5	-37.3
Wine and Beer	1,311.0	1,549.3	1,537.2	1,669.2	1,763.7	1,763.5	1,875.7*	6.4
Nursery Products	5.0	5.0	5.9	5.7	4.9	6.0	7.6	25.8
Roasted & Instant Coffee	47.0	60.0	68.3	71.5	82.1	97.7	101.4*	3.9
Spices	3.0*	2.5	1.8	2.3	2.2	1.9	1.4	-25.0
Other Consumer Oriented	408.0	462.5	515.4	548.7	640.2	644.6	663.6*	2.9
Forest Products	71.0	67.4	78.1	89.0	98.5	98.7	119.3	20.9
Logs and Chips	0.0	0.0	0.1	0.0	0.1	0.2	0.5*	118.8
Hardwood Lumber	1.0	1.9	2.5	2.6	2.6	3.4	2.5	-26.0
Softwood and Treated Lumber	0.0	0.2	0.1	0.1	0.0	0.0	0.1	828.9
Panel Products (Incl Plywood)	22.0	28.3	31.4	32.4	41.6	41.3	55.2*	33.7
Other Value-Added Wood Prod.	48.0	37.0	44.1	54.0	54.3	53.7	60.9	13.5
Seafood Products	10.0	11.7	12.0*	10.2	9.9	10.2	10.6	4.4
Shrimp	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Tuna	1.0	1.5	1.4	1.0	1.3	1.2	1.5	19.2
Lobster	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Groundfish, Fillet/Steak	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Salmon Whole or Eviscerated	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Edible Fish & Seafood	9.0	10.2	10.5*	9.1	8.5	8.9	9.2	2.8
Agricultural Products	2,939.0	3,386.8	3,498.6	3,746.4	4,026.9	4,077.5	4,267.7*	4.7
Ag, Fish & Forest Prods	3,019.0	3,466.0	3,588.8	3,845.6	4,135.3	4,186.4	4,397.6*	5.0

Table C: Italy's top 15 consumer food imports from the world

Commodity HS Code	Description	United States Dollars			% Share		
		2013	2014	2015	2013	2014	2015
Consumer Oriented			25,246,211,	21,567,295,	100	100	100

Total		24,842,991,773	737	982			
020312	Swine Meat	1,462,224,706	1,461,014,216	1,081,115,753	5.89	5.79	5.01
020120	Bovine Meat	1,222,530,426	1,209,480,296	1,001,645,045	4.92	4.79	4.64
040690	Cheese	1,349,501,240	1,307,121,189	963,540,000	5.43	5.18	4.47
040120	Milk	1,041,029,283	947,264,308	637,276,950	4.19	3.75	2.95
210690	Food Preparations	602,059,872	665,382,431	612,031,323	2.42	2.64	2.84
220300	Beer Made From Malt	644,540,095	654,173,017	599,731,322	2.59	2.59	2.78
230910	Dog And Cat Food	623,965,563	675,655,786	585,395,485	2.51	2.68	2.71
190590	Bread, Pastry, Cakes, and Puddings	558,076,560	569,689,799	500,944,686	2.25	2.26	2.32
080390	Bananas, Fresh Or Dried	512,632,038	527,876,550	468,270,962	2.06	2.09	2.17
080222	Hazelnuts Or Filberts, Fresh Or Dried, Shelled	270,480,955	319,938,910	432,742,253	1.09	1.27	2.01
080212	Almonds, Fresh Or Dried, Shelled	220670686	280620759	330266856	0.89	1.11	1.53
040310	Yogurt	252258181	283604440	242160441	1.02	1.12	1.12
180690	Cocoa Preparations	252365303	265625411	236002919	1.02	1.05	1.09
200410	Frozen Potatoes	287063694	281837269	230165705	1.16	1.12	1.07

060290	Live Plants, Cuttings & Slips, Mushroom Spawn	235617698	226579106	202944540	0.95	0.9	0.94

Source: Global Trade Atlas (GTA)

Table C: Italy's top 15 consumer food imports from the United States

Commodity HS Code	Description	United States Dollars			% Share		
		2013	2014	2015	2013	2014	2015
Consumer Oriented Total		421,867,820	534,173,267	437,353,431	100	100	100
080212	Almonds, Fresh, Dried, Shelled	122,651,080	174,729,249	185,092,822	29.07	32.71	42.32
080231	Walnuts, Fresh, Dried, In Shell	65,347,282	85,156,656	53,702,610	15.49	15.94	12.28
220429	Wine	56,465,300	59,500,324	44,809,350	13.38	11.14	10.25
200290	Tomato Paste	63,020,021	76,166,827	42,388,855	14.94	14.26	9.69
080251	Pistachios, In Shell, Fresh, Dried	21,384,083	22,957,533	18,254,528	5.07	4.3	4.17
020130	Bovine Meat	15,994,382	20,496,065	11,976,555	3.79	3.84	2.74
081320	Dried Prunes	12,584,253	12,516,777	11,656,114	2.98	2.34	2.67
080232	Walnuts, Fresh, Dried, Shelled	12,680,376	13,404,785	10,364,348	3.01	2.51	2.37
210690	Food Preparations	4,560,944	5,424,699	9,399,596	1.08	1.02	2.15
230910	Dog And Cat Food	7,823,211	9,655,161	8,242,052	1.85	1.81	1.88

080252	Pistachios, Shelled, Fresh, Dried	6,564,286	11,634,582	6,840,936	1.56	2.18	1.56
080211	Almonds, Fresh, Dried, In Shell	4,819,288	6,502,364	6,306,349	1.14	1.22	1.44
080290	Nuts, Fresh, Dried, Shelled	1,845,956	2,406,145	3,228,921	0.44	0.45	0.74
220300	Beer Made From Malt	1,547,310	2,869,485	2,903,859	0.37	0.54	0.66
200893	Cranberries, Prepared, Preserved	1,443,172	2,463,262	2,484,740	0.34	0.46	0.57

Source: GTA

Table C: Italy's top 15 fish and seafood products imports from the world

Commodity HS Code	Description	United States Dollars			% Share		
		2013	2014	2015	2013	2014	2015
Fish & Seafood Products Total		5,613,960,974	5,949,218,731	5,401,873,280	100	100	100
160414	Tunas, Skipjack, Bonito	813,874,204	808,497,835	624,115,969	14.5	13.59	11.55
030617	Shrimps And Prawns, Frozen	445,929,842	561,961,328	442,596,947	7.94	9.45	8.19
030749	Cuttle Fish, Squid, Frozen, Dried, Salted, In Brine	448,336,650	454,709,315	423,559,008	7.99	7.64	7.84
030759	Octopus, Frozen, Dried,	210,870,430	287,621,030	285,701,428	3.76	4.83	5.29

	Salted, In Brine						
030214	Atlantic Salmon And Danube Salmon, Fresh, Chilled	210,119,134	229,662,371	222,444,966	3.74	3.86	4.12
030541	Pacific, Atlantic And Danube Salmon, Smoked	201,118,275	237,230,631	211,721,037	3.58	3.99	3.92
030285	Sea bream, Fresh, Chilled	172,397,550	190,257,947	175,731,456	3.07	3.2	3.25
030799	Mollusks, Frozen, Dried, Salted, In Brine	146,209,798	163,671,024	156,242,774	2.6	2.75	2.89
030284	Sea bass, Fresh, Chilled	149,931,475	164,066,939	155,244,605	2.67	2.76	2.87
160420	Fish, Prepared, Preserved	145,790,020	151,342,058	151,782,319	2.6	2.54	2.81
030474	Hake Fillets, Frozen	147,729,821	125,195,029	114,816,433	2.63	2.1	2.13
030615	Norway Lobsters, Frozen	87,140,878	92,203,806	85,445,602	1.55	1.55	1.58
160416	Anchovies, Prepared Or Preserved, Not Minced	70,826,328	70,844,694	70,532,074	1.26	1.19	1.31
030357	Swordfish,		63,618,53	67,291,64	1.15	1.07	1.25

	Frozen	64,606,489	6	4			
030741	Cuttle Fish and Squid, Live, Fresh, Chilled	67,766,595	65,558,321	65,102,471	1.21	1.1	1.21

Source: GTA

Table C: Italy's top 15 fish and seafood products imports from the United States

Commodity HS Code	Description	United States Dollars			% Share		
		2013	**2014**	**2015**	**2013**	**2014**	**2015**
Fish & Seafood Products Total		68,633,479	84,809,030	84,694,209	100	100	100
030622	Lobsters, Live, Fresh, Chilled, Dried, Salted, In Brine	43,641,587	48,475,230	45,307,132	63.59	57.16	53.49
030474	Hake Fillets, Frozen	13,575,630	18,138,018	15,672,169	19.78	21.39	18.5
030749	Cuttle Fish & Squid, Frozen, Dried, Salted Or In Brine	2,201,735	5,626,879	8,169,458	3.21	6.63	9.65
030390	Fish Livers And Roes, Frozen	2,545,780	5,525,044	4,704,389	3.71	6.51	5.55
030363	Cod, Frozen	1,757,341	2,761,637	3,370,567	2.56	3.26	3.98
160530	Lobster, Prepared Or Preserved	1,447	-	2,421,218	0	0	2.86
030481	Pacific, Atlantic And Danube Salmon Fillets, Frozen	1,620,628	1,312,605	1,923,912	2.36	1.55	2.27
030741	Cuttle Fish & Squid,	124,818	909,745	685,429	0.18	1.07	0.81

	Live, Fresh, Chilled						
030311	Sockeye Salmon	122,830	114,363	317,887	0.18	0.13	0.38
030289	Fish, Fresh, Chilled	701,767	496,967	316,347	1.02	0.59	0.37
030213	Pacific Salmon, Fresh, Chilled	272,501	346,818	296,933	0.4	0.41	0.35
030721	Scallops, Live, Fresh, Chilled	291,185	285,789	289,395	0.42	0.34	0.34
030612	Lobsters, Including In Shell, Frozen	119,647	28,410	287,406	0.17	0.03	0.34
030629	Crustaceans	221,793	132,738	182,490	0.32	0.16	0.22
030281	Dogfish And Other Sharks, Fresh, Chilled	598,580	-	127,963	0.87	0	0.15

Source: GTA

Table C: Italy's top 15 suppliers of consumer oriented products

Partner Country	United States Dollars			% Share		
	2013	2014	2015	2013	2014	2015
World	24,842,991,773	25,246,211,737	21,567,295,982	100.00	100.00	100.00
Germany	5,859,887,598	5,769,547,382	4,442,319,915	23.59	22.85	20.60
France	3,862,710,787	3,847,024,825	3,194,469,134	15.55	15.24	14.81
Spain	2,523,331,791	2,593,052,378	2,372,485,980	10.16	10.27	11.00
Netherlands	2,668,959,777	2,658,211,820	2,297,977,582	10.74	10.53	10.65
Belgium	1,186,044,412	1,188,919,038	1,020,621,476	4.77	4.71	4.73
Austria	1,236,852,858	1,232,379,801	987,088,778	4.98	4.88	4.58

Poland	969,970,898	1,053,810,915	968,009,996	3.90	4.17	4.49
Turkey	473,790,740	519,083,965	570,174,002	1.91	2.06	2.64
Denmark	580,145,197	555,156,306	448,439,294	2.34	2.20	2.08
United States	421,867,820	534,173,267	437,353,431	1.70	2.12	2.03
United Kingdom	418,543,199	446,648,641	375,829,566	1.68	1.77	1.74
Ireland	383,767,984	399,079,508	298,446,279	1.54	1.58	1.38
Brazil	267,500,817	273,233,375	279,836,503	1.08	1.08	1.30
Greece	247,794,241	278,713,022	271,207,606	1.00	1.10	1.26
Costa Rica	221,873,766	229,250,066	251,439,997	0.89	0.91	1.17

Source: GTA

Table C: Italy's top 15 suppliers of fish and seafood products

Partner Country	United States Dollars			% Share		
	2013	2014	2015	2013	2014	2015
World	5,613,960,974	5,949,218,731	5,401,873,280	100.00	100.00	100.00
Spain	1,138,084,495	1,188,942,185	1,137,627,433	20.27	19.98	21.06
Netherlands	362,898,889	383,744,616	363,043,612	6.46	6.45	6.72
Denmark	357,478,371	347,078,271	316,123,909	6.37	5.83	5.85
Sweden	207,041,743	247,140,683	236,826,991	3.69	4.15	4.38
France	279,444,902	253,480,772	231,225,894	4.98	4.26	4.28
Greece	268,525,020	280,530,184	228,556,673	4.78	4.72	4.23
Germany	204,217,937	227,564,545	200,379,203	3.64	3.83	3.71
Ecuador		304,583,92	198,309,04	5.22	5.12	3.67

	293,020,204	9	1			
Morocco	192,132,038	187,711,098	192,877,607	3.42	3.16	3.57
United Kingdom	136,487,369	147,435,840	142,810,677	2.43	2.48	2.64
Thailand	189,724,373	209,145,487	142,605,713	3.38	3.52	2.64
India	123,215,694	149,690,999	141,421,423	2.19	2.52	2.62
Argentina	150,766,586	145,732,514	125,445,806	2.69	2.45	2.32
Vietnam	146,166,682	141,815,092	120,104,377	2.60	2.38	2.22
China	119,603,767	108,119,938	114,981,638	2.13	1.82	2.13

Source: GTA