USDA Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Template Version 2.09

Required Report - Public distribution

Date: 9/23/2008

GAIN Report Number: IT8024

Italy

Exporter Guide

Road Map to the Italian Market

2008

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

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Rome [IT1]
[IT]

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Section I. Market Overview

Macro Economic Situation & Key Demographic Trends

Italy has a diversified industrial economy with roughly the same total and per capita output as France and the UK. Most raw materials required by Italian industry, including the food processing sector, and more than 75% of energy requirements, are imported. Over the past decade, Italy has pursued a tight fiscal policy in order to meet the requirements of the Economic and Monetary Union and is part of the Euro Zone. Italy has moved slowly, however, on implementing needed structural reforms, such as lightening the high tax burden and overhauling Italy's rigid labor market and over-generous pension system, because of the current economic slowdown and opposition from labor unions. But the leadership faces a severe economic constraint: Italy's official debt remains above 100% of GDP, and the Berlusconi government has found it difficult to bring the budget deficit down to a level that would allow a rapid decrease in that debt. The economy continues to grow by less than the euro-zone average and growth is expected to decelerate from 1.9% in 2006 and 2007 to less than 1.5% in 2008 as the euro-zone and world economies slow.

Italy is one of the largest agricultural producer in the European Union (EU). Its major trading partners in food and agricultural products are EU member states, with neighboring France and Germany each accounting for roughly a fifth of Italy's trade. Italy's major exports consist of wine, olive oil, cheeses, and fruits and vegetables. Italian perception of the place and role of Italian food in the global marketplace ties into the issue of protected designations of origin, or geographic indications, which represent only a small fraction of the value of total food production yet loom large in Italy's national marketing of its food exports as 'high quality and Italian".

On balance, Italy is a net importer of agricultural products. In 2007, Italy imported $1.0 billion of U.S. food and agricultural products. Italy's total annual food and agriculture imports were more than $38.5 billion. The EU remains Italy's most important trading partner: Italy's trade quota with EU-25 countries for exports amounted to 68.3%, slightly lower than the previous year, with imports at 70.1%. The top five suppliers to Italy were France, Germany, Spain, the Netherlands and Austria, while the main importers of Italy's goods, in addition to Germany and France, were the United States, followed by the UK and Spain. Wine dominates Italy's food exports, followed by pasta, virgin and extra-virgin olive oil, canned tomatoes, cheese, biscuits and baked goods. The United States is Italy's largest non-EU market. The United States imported more than $3.1 billion worth of Italian food and agricultural products in 2007, with wine comprising almost $1.3 billion of that total. Because of its large food processing sector's need for inputs, Italy has become a net agricultural importing country.

The United States is, for Italy, primarily a supplier of high quality inputs for Italian food processing–wheat for pasta and confectionary, forest products for furniture and housing components, tree nuts for bakery products, seeds for planting, hides and skins, seafood for the restaurant sector, and tobacco. While consumer-ready products also do succeed in this market, the EU's system of making technical conclusions subordinate to political decisions has constrained trade for many U.S. products, but in particular, meats and products containing genetically modified ingredients.

Because the export market drives the Italian food processing sector, the economic performance of the world market, and particularly the economic performance of Germany and other northern neighbors, heavily influences Italian business performance. Outside the

EU, where Italy competes in global food markets, the weak dollar and strong euro have continued to exert pressure on Italian food export prospects. The notable exception is the United States where Italian wine sales continue to grow in spite of the 'expensive' euro.

Italian Importers and Retailers

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. 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 Netherlands' Port of Rotterdam, or directly by air.

Processed food is primarily distributed through retail grocers, convenience stores and discount grocers. Italian retail chain outlets have started to make their own purchasing decisions.

Advantages and Challenges for U.S. Exporters in Italy

Advantages	***Challenges***
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.	Ingrained political opposition to modern biotechnology, which leads distribution chains to avoid GMO products.
Weak dollar versus a strong EURO favors U.S. exports.	The detention of U.S. products by Italian border inspectors for not conforming to EU sanitary standards.
U.S. fast food chains, theme restaurants, and the food processing industry are demanding U.S. origin ingredients.	Need to develop and invest in the relationship with the Italian trade contacts and the marketing of the product. Supermarket and hypermarket shelf space and product placement is expensive.

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. Product 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 Product Trade Restrictions, Food Standards and Regulations, please refer to Post's FAIRS GAIN Report IT8022.

Section III. Market Sector Structure and Trends

The Italian Food Retail Sector

Italians spend an enormous amount of their disposable income on food, beverages and tobacco (more than 20%). In 2006 household expenditure in Italy on food and drink (including alcoholic beverages) was approximately $173 billion—a 4.2% increase from the previous year. In Italy there are 2.3 million foreign residents and food retail outlets have started 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.

There were 194,205 fixed retail outlets selling food as their main commercial activity at the end of 2006, an increase of 1.1% from the previous year. This was the result of a different trend for non-specialized outlets, which increased by 3,585 businesses and specialized outlets of which there were fewer dealing in fruits and vegetables, 442 fewer dealing in meat and 685 fewer dealing in other specialized products. There was however an increase in businesses specializing in wine, olive oil and drinks.

Geographically speaking, the number of food outlets showed the greatest increases in the Center. As of 1 January 2006 there were 8,181 registered supermarkets in Italy. Italian food retailing is still very fragmented and dominated by a high number of small to medium-sized outlets. 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 leverage when dealing with suppliers. Although buying groups are largely the precinct 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, in order to assimilate know-how and avoid fairly strict Italian regulations.

Discount retailers are slowing 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.

COOP is presently the most important retailer in Italy. Born as a cooperative between farmers, they have succeeded in incorporating small to medium sized Italian businesses, which have flourished by maintaining their in-depth knowledge and appreciation of Italian and local tastes and needs.

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.

The Italian Hotel and Food Service Industry

Every year more than 87 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, with only 6% of the over 130,000 hotels, bed and breakfast, youth hostels, camping's, resorts and rural tourism 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 numbers of consumers will

eat out during their lunch breaks and possibly also for their evening meals as a result of their jobs, long working hours and business meetings. In the future very few will be able to have a siesta in the afternoon, while most will have to cut down on their lunch break time. Although lunch breaks are likely to become shorter, it is unlikely that most Italians will eat lunch at their desks. Italians still prefer leaving the office for a quick bite.

Section IV.
Best Prospects for U.S. Agricultural, Fish and Forestry Exports

U.S. bulk and intermediate commodities are used as ingredients or inputs for value-added Italian products re-exported. North American high-quality durum wheat, for example, is used to produce pasta. Italy is the world's fifth largest importer of seafood products, with an annual per capita consumption of almost 25 kilograms of fish and seafood. Last year Italy imported from the United States $83.5 million in seafood products (the highest export level since 1970.)

Opportunities exist in the supply of fish, especially tuna, salmon, crab, surimi, roe, seafood for the canning industry, frozen fish fillets such as hake, cod and plaice to meet the demand for convenient, ready-to-prepare products, peeled and processed shrimp, squid, cuttlefish, octopus and lobster. Opportunities also exist for fruit berries, condiments, fruit juices, and tree nuts, all sectors that have seen growth in recent years.

Leading U.S. Agricultural Exports to Italy in 2007
(Thousands of U.S. $)

Forest Products	$ 228,543
Tree nuts	$ 138,672
Wheat	$ 155,761
Fish & Seafood	$ 83,550
Vegetable Oils	$ 58,815
Hides and Skin	$ 52,206
Wine & Beer	$ 49,683
Soybeans	$39,973
Cotton	$ 23,908
Planting Seeds	$ 22,606
Source: *BICO*	

Leading Italian Agricultural Exports to the United States in 2007
(Thousands of U.S. $)

Wine & Beer	$ 1,303,648
Other Vegetable oils	$ 607,327
Cheese	$ 300,945
Snack Foods (including chocolate)	$ 106,532
Red Meats	$ 57,472
Processed Fruit & Vegetables	$ 42,675
Roasted Instant Coffee	$ 42,132
Panel Products (incl. Plywood)	$ 39,471
Fresh Fruit	$ 19,524
Essential Oils	$ 11,453
Source: *BICO*	

Key Trade & Demographic Information - Italy 2007
(Thousands of U.S. $)

Agricultural, Fish and Forestry Imports from the U.S. 1,000,330	***Consumer Food Imports from the U.S.:*** 278,691
Fish and Seafood Imports from the U.S.: 83,550	***Population Growth rate:*** -0.019% (2008 est.)
Population 58,145,320 (July 2008 est.)	***Total Rural Population:*** 19 Million ***Total Urban Population:*** 39 Million
Major City Centers: (13) Rome, Milan, Naples, Turin, Palermo, Genoa, Bologna, Florence, Catania, Bari, Venice, Messina and Verona	***Per Capita Income:*** $30,400
Gross Domestic Product: $1.785 trillion (2007 est.)	***Labor Force by Occupation:*** Agriculture: 1.3 million Industry: 6.9 million Services: 16.5 million
Unemployment Rate: 6% (2007 est.)	***Labor Force:*** 24.71 million (2007 est.)
Exchange Rate: EURO per U.S. Dollar Average 2007 $0.7345= $1.00 Average 2006: €0.7964 = $1.00 Average 2005: €0.8041 = $1.00 Average 2004: €0.8054 = $1.00 Average 2003: €0.8860 = $1.00 Average 2002: €1.0626 = $1.00	

Source: *BICO, ISTAT, Global Trade Atlas, European Central Bank, and CIA Fact Book*

Italy Import Statistics
Fish & Seafood Products

Quantity=tons

Rank	Country	2006	2007	2008
1	Spain	77,867	71,899	73,145
2	France	24,340	21,794	23,679
3	Netherlands	21,696	19,594	20,509
4	Thailand	18,540	21,970	20,130
5	Vietnam	11,783	11,654	18,179
6	Germany	15,541	14,623	17,495
7	Greece	14,514	14,904	16,310
8	Denmark	19,100	15,445	15,225
9	Ecuador	12,445	13,950	13,339
10	Morocco	10,648	12,048	11,809
11	Argentina	13,780	12,592	11,185
12	India	7,365	8,254	9,216
13	Malaysia	7,203	6,781	7,287
14	United Kingdom	7,280	7,333	7,064
15	China	5,980	9,285	7,049

Value=U.S. Dollars

Rank	Country	2006	2007	2008
1	Spain	339,718,935	354,189,293	432,531,151
2	Netherlands	156,910,835	153,849,586	176,532,451
3	France	133,335,248	140,290,529	170,079,341
4	Denmark	158,453,062	137,647,972	152,816,078
5	Germany	59,594,548	65,403,543	102,727,184
6	Greece	69,503,754	86,512,236	98,250,779
7	Thailand	67,792,744	80,616,992	89,227,784
8	Morocco	56,063,880	71,452,987	86,710,644
9	Ecuador	66,603,749	72,403,422	84,472,955
10	Vietnam	36,484,022	39,079,833	65,732,451
11	United Kingdom	51,423,402	57,740,633	61,652,214
12	Sweden	27,324,974	39,660,350	45,311,953
13	Tunisia	27,303,625	38,931,104	44,940,533
14	Colombia	31,220,598	30,034,905	40,454,707
15	Argentina	40,127,033	45,121,027	39,444,052

Source: Global Trade Atlas

Italy Import Statistics From United States
Commodity: Fish & Seafood Products,
Year To Date: January - May

Rank	Description	Quantity 2006	Quantity 2007	Quantity 2008	% Share 2006	% Share 2007	% Share 2008	% Change
		3,093	4,156	3,045	100	100	100	-26.73
1	Lobsters, Live, Fresh,Ch, Dried, Saltd Or In Brine	981	880	1,071	31.7	21.2	35.2	21.74
2	Cuttle Fish & Squid, Froz, Dri, Salted Or In Brine	1,117	1,257	904	36.1	30.2	29.7	-28.11
3	Mackerel Except Fillets, Livers And Roes, Frozen	522	1,123	478	16.9	27	15.7	-57.49
4	Pacific Salmon, Nesoi, Excl Filet, Liver,Roe, Froz	251	405	285	8.12	9.74	9.34	-29.68
5		0	36	99	0	0.86	3.25	177.81
6	Fish Livers And Roes, Frozen	44	78	96	1.41	1.87	3.14	23.2
7	Cuttle Fish & Squid, Live, Fresh Or Chilled	38	39	28	1.22	0.93	0.92	-27.65
8	Eels (Anguilla Spp.), Live	5	15	17	0.17	0.37	0.56	11.76
9	Sockeye Salmon, Excl Fillet, Livers & Roes, Frozen	28	221	16	0.91	5.31	0.54	-92.56
10	Fish, Prepared Or Preserved, Nesoi	0	0	14	0	0	0.47	
11	Salmon, Prepared Or Preserved, Whole Or Pieces	15	3	14	0.48	0.07	0.46	386.21
12	Mussels, Frozen, Dried, Salted Or In Brine	6	8	7	0.19	0.2	0.24	-10.98
13	Crabs, Including In Shell, Frozen	0	1	4	0	0.03	0.13	192.86
14	Rock Lobster And Other Sea Crawfish, Frozen	0	0	4	0	0	0.13	
15	Scallops Incl Queen Scallops, Live, Fresh, Chilled	0	0	2	0	0	0.08	1100

16	Fish, Ornamental, Live	1	1	2	0.02	0.02	0.06	137.5
17	Dogfish, Other Shark Excpt Fillet Liver Roe, Fr/Ch	1	6	1	0.04	0.14	0.05	-76.67
18	Lobsters, Including In Shell, Frozen	0	0	1	0	0	0.04	
19	Fish Livers And Roes, Fresh Or Chilled	1	0	1	0.02	0	0.03	700
20	Shrimps/Prawns Inc Live, Fr/Ch/Drd/Salted/In Brine	0	0	1	0	0	0.02	
21	Molluscs Etc Nesoi, Live, Fresh Or Chilled	0	0	0	0	0.01	0.01	0
22	Fish, Nesoi, With Bones, Fresh Or Chilled	2	0	0	0.05	0	0.01	
23	Molluscs Etc Nesoi, Frozen, Dri, Salted Or In Brin	0	34	0	0	0.82	0	-99.71
24	Mussels, Live, Fresh Or Chilled	1	0	0	0.02	0	0	
25	Shrimps And Prawns, Including In Shell, Frozen	0	0	0	0	0	0	
26	Salmon, Pac, Atl & Danube, With Bones, Fr Or Chill	0	21	0	0	0.5	0	-100
27	Flatfish Nesoi Except Fillet, Liver Roe Fresh/Chld	7	3	0	0.21	0.06	0	-100
28	Sole, Except Fillets, Livers And Roes, Frozen	0	1	0	0	0.03	0	-100
29	Fish Fillets, Frozen	24	0	0	0.77	0	0	
30	Fish, Nesoi, With Bones, Frozen	26	3	0	0.84	0.06	0	-100
31	Fish Meat Nesoi, Exc Fish Steaks & Fillets, Froz	23	0	0	0.73	0	0	
32	Fish Liver & Roe, Dried, Smoked, Saltd Or In Brine	2	0	0	0.06	0	0	0

Source: Global Trade Atlas

Italy Import Statistics
Consumer Oriented
Agriculture

Quantity=tons

Rank	Partner Country	Quantity=tons 2006	2007	2008
1	Germany	148,088,029	176,030,137	165,531,479
2	Netherlands	100,689,902	88,452,414	89,229,344
3	Austria	58,260,423	73,258,852	75,944,188
4	Spain	33,761,356	30,294,118	50,236,124
5	Netherlands	31,711,063	34,176,866	27,365,128
6	Thailand	28,265,925	29,297,531	26,804,189
7	France	24,793,372	25,343,516	21,838,940
8	Denmark	18,933,469	21,848,679	21,771,009
9	United States	20,175,167	28,162,007	21,097,039
10	Greece	16,303,000	11,277,042	18,432,506
11	Belgium	11,215,716	10,652,853	13,057,601
12	France	10,363,485	12,749,151	12,679,335
13	Slovenia	8,585,225	9,693,009	12,204,644
14	United Kingdom	7,232,370	8,115,645	6,959,311
15	Mexico	1,558,915	1,846,327	5,437,251

Value=U.S. Dollars

Rank	Partner Country	Value=U.S. Dollars 2006	2007	2008
	World	7,364,257,869	7,813,711,446	9,954,890,930
1	Germany	1,658,540,603	1,808,865,080	2,310,945,092
2	France	1,137,822,036	1,182,901,250	1,536,737,524
3	Netherlands	943,142,126	951,694,503	1,176,553,430
4	Spain	645,282,643	649,638,770	889,008,624
5	Belgium	377,131,923	397,716,008	506,757,027
6	Austria	375,032,001	375,675,783	498,101,848
7	Denmark	275,382,936	261,552,399	331,576,577
8	Poland	152,482,731	165,383,639	243,371,847
9	Ireland	153,790,756	141,505,269	180,793,778
10	United Kingdom	134,242,680	129,561,772	169,696,887
11	Brazil	132,625,302	181,489,304	151,696,599
12	Argentina	98,127,598	122,527,107	148,390,265
13	Ecuador	113,365,007	103,276,072	145,953,107
14	Switzerland	81,929,153	111,832,539	141,865,736
15	Turkey	139,092,516	130,646,783	140,466,657

Source: Global Trade Atlas

Italy Import Statistics From United States
Commodity: Consumer Oriented Agriculture
Year To Date: January - May

Rank	Description	Quantity 2006	Quantity 2007	Quantity 2008	% Share 2006	% Share 2007	% Share 2008	% Change
1	Wine, Fr Grape Nesoi & Gr Must With Alc, Nesoi	19,593,137	27,432,756	20,444,375				-25.47
2	Fermented Beverages Nesoi (Cider, Perry, Mead Etc)	385,227	451,750	325,994				-27.84
3	Nonalcoholic Beverages, Nesoi	171,440	199,176	244,367				22.69
	Birds' Eggs, In The Shell, Fresh, Preserv Or Cookd	20,150	1,197,000	58,320				-95.13
	Waters, Incl Mineral & Aerated, Sweetnd Or Flavord	0	0	38,143				
6	Wine, Fr Grape Nesoi & Gr Must W Alc, Nov 2 Liters	25,363	48,060	25,045				-47.89
7	Tomato Paste Etc, Not Prepared With Vinegar Etc.	0	21	23,674				8
8	Water, Mineral & Aerated Natrl/Artfcl Nt Swtn/Flav	0	17,028	19,000				11.58
9	Almonds, Fresh Or Dried, Shelled	7,657	5,243	7,815				49.07
10	Dog And Cat Food, Put Up For Retail Sale	2,408	2,202	2,254				2.33
11	Walnuts, Fresh Or Dried, In Shell	2,333	1,401	1,756				25.4
12	Prunes, Dried	1,241	2,339	1,499				-35.91
13	Meat Of Swine, Nesoi, Frozen	49	458	1,354				195.37
14	Pistachios, Fresh Or Dried, Shelled Or Not	932	1,041	1,087				4.47
15	Almonds, Fresh Or Dried, In Shell	407	353	427				20.97

16	Walnuts, Fresh Or Dried, Shelled	332	397	412	3.96
17	Birds' Eggs, In The Shell, Fresh, Preserv Or Cookd	90	48,895	293	-99.4
18	Live Plants, Cuttings & Slips,Nesoi;Mushroom Spawn	44	140	222	58.81
19	Hazelnuts Or Filberts, Fresh Or Dried, In Shell	619	204	222	8.84
20	Grapefruit Juice,Nesoi,Nt Fortorified W Vitamins	0	47	132	183.48
21	Grapes, Dried (Including Raisins)	55	20	129	552.28
22	Food Preparations Nesoi	87	107	117	9.82
23	Beer Made From Malt	0	11,072	115	-98.96
24	Onions And Shallots, Fresh Or Chilled	73	54	114	109.19
25	Fruit, Dried, Nesoi, Ex That Of Heading 0801-0806	61	59	86	44.35
26	Dextrins And Other Modified Starches	79	63	85	35.41
27	Milk Albumin,Inc Concen Of 2 Or More Whey Proteins	56	56	56	0
28	Yeasts, Inactive; Oth Single-Cell Dead Micro-Orgnm	13	39	49	25.91
29	Bread, Pastry, Cakes, Etc Nesoi & Puddings	42	75	44	-41.5
30	Wine Lees; Argol	0	0	40	
31	Yogurt, W/N Sweetened, Flavored Or Cntg Fruit/Coco	21	38	38	0
32	Peas, Raw Cooked In Boiling Water, Frozen	0	0	36	

33	Sauces Etc. Mixed Condiments And Seasonings Nesoi	50	72	35	-50.63
34	Nuts Nesoi, Fresh Or Dried, Shelled Or Not	73	87	31	-63.94
35	Fruit & Edible Plant Parts Nesoi, Prep Etc. Nesoi	213	36	29	-20.22
36	Fruit & Nuts Provisionally Preserved Inedible Neso	8	61	22	-63.98
37	Pears And Quinces, Fresh	0	0	19	
38	Meat, Bovine Cuts With Bone In, Fresh Or Chilled	2	13	18	42.52
39	Enzymes And Prepared Enzymes, Nesoi	10	15	18	19.21
40	Pasta, Stuffed, Whether Or Not Cooked, Etc.	0	0	18	
41	Nuts (Exc Peanuts) And Seeds, Prepared Etc. Nesoi	0	15	16	10.88
42	Egg Yolks, Dried, Whether Or Not Sweetened	0	11	15	35.14
43	Fruit Nesoi & Nuts, Sweetened Etc Or Not, Frozen	0	18	14	-22.53
44	Mustard Flour And Meal And Prepared Mustard	17	7	13	81.43
45	Vegetable Waxes (Other Than Triglycerides)	9	9	11	26.14
46	Peanuts, Prepared Or Preserved, Nesoi	23	14	11	-19.26
47	Tea Or Mate Extracts/Essences /Concentrates & Preps	21	21	10	-50

48	Vegetble Prodcts (Inc Unrt Chicory Rt) Edible Neso	1	10	7	-27.37
49	Meat Of Bovine Animals, Boneless, Fresh Or Chilled	4	35	6	-83.05
50	Coffee, Roasted, Not Decaffeinated	0	1	6	366.67
51	Foliages, Branches Etc Drid/Dyed/Blachd/ Impreg Etc	18	13	5	-61.42
52	Pasta, Uncooked, Not Stuffed Etc., Nesoi	33	3	4	25
53	Fats And Oils Derived From Milk, N.E.S.O.I.	0	0	3	
54	Tomato Ketchup And Other Tomato Sauces	0	4	3	-20
55	Flour & Meal Of Sago, Roots/Tubers Of Heading 0714	0	2	2	0
56	Asparagus, Fresh Or Chilled	12	0	2	
57	Soups And Broths And Preparations Therefor	1	1	2	80
58	Vegetables, Nesoi, Fresh Or Chilled	0	0	2	
59	Malt Extract; Flour, Meal, Milk Etc Prod Etc Nesoi	4	1	1	120
60	Cocoa Preparations, Not In Bulk Form, Nesoi	0	0	1	300
61		0	7	1	-88.57
62	Prep Food, Swelling/Roasting Cereal/Cereal Product Prepared Etc.	0	0	1	
63	Poultry Meat, Except Turkey, Nesoi	0	0	1	
64	Cocoa Powder Cont Added Sugar Or Other Sweetening	0	0	1	

65	Mixes & Doughs For Prep Of Bakers Wares Hdg 1905	29	28	1	-98.23
66	Yeasts, Active	1	3	0	-90.91
67	Baking Powders, Prepared	0	0	0	
68	Coffee Extracts, Essences Etc. & Prep Therefrom	0	0	0	
69	Waters Not Sweetnd Or Flavored Nesoi; Ice And Snow	2	0	0	
70	Pasta, Uncooked, Not Stuffed Etc., Containing Eggs	0	1	0	-100
71	Cookies (Sweet Biscuits)	3	0	0	-100
72	Pasta, Prepared Nesoi	0	0	0	
73	Tomatoes Whole/Pieces Prep/Pres Ex Vinegar Etc	44	10	0	-100
74	Truffles, Prep/Pres Except By Vinegar/Acetic Acid	0	0	0	
75	Beans, Shelled, Prep Etc., No Vinegar Etc, Not Frz	34	0	0	
76	Olives Prep/Pres Ex Vinegar/Acetic Acid Not Frozen	0	1	0	-100
77	Vegs Inc Mixtures Nesoi Prep/Pres Nesoi Not Frozen	7	0	0	
78	Rennet And Concentrates Thereof	0	0	0	
79	Albumin & Albumin Derivatives, Nesoi	0	0	0	-100
80	Casein	0	0	0	
81	Other Egg Albumin, Except Dried	0	0	0	

82	Chocolate Prep Nesoi, In Blocks Etc. Over 2 Kg	0	0	0	-100
83	Margarine, Excluding Liquid Margarine	0	0	0	
84	Prepared Or Preserved Swine Nesoi, Hams Etc	0	2	0	-100
85	Lactose & Lactose Syrup Cont 99% More Lactse By Wt	0	1	0	-100
86	Lactose In Solid Form And Lactose Syrup, Nesoi	1	2	0	-100
87	Chewing Gum, Whether Or Not Sugar Coated	1	0	0	-100
88	Sugar Confection (Incl Wh Choc), No Cocoa, Nesoi	3	2	0	-100
89	Flour, Meal & Powder Of The Products Of Chapter 8	0	0	0	-100
90	Coffee, Roasted, Decaffeinated	0	0	0	
91	Spices, Nesoi	20	40	0	-100
92	Flour And Meal Of Potatoes	0	17	0	-100
93	Flakes, Granules And Pellets Of Potatoes	0	204	0	-100
94	Cherries, Sweet Or Tart, Fresh	0	6	0	-100
95	Peaches, Including Nectarines, Fresh	0	0	0	
96	Raspberries/Blckberries/Mulberries/ Loganberrs Frsh	0	0	0	
97	Cranberries, Blueberries, Etc, Fresh	0	0	0	
98	Chestnuts, Frsh Or Dried, W/Nt Shelled Or Peeled	46	160	0	-100

99	Vegetables Nesoi & Mixtures, Dried, No Furth Prep	36	11	0	-100
100	Sweet Potatoes, Fresh Or Dried, Whether/Nt Pellets	0	1	0	-100
101	Cashew Nuts, Fresh Or Dried, In Shell	20	0	0	
102	Cashew Nuts, Fresh Or Dried, Shelled	0	7	0	-100
103	Hazelnuts Or Filberts, Fresh Or Dried, Shelled	10	0	0	
104	Cheese, Nesoi, Including Cheddar And Colby	0	0	0	
105	Live Plant Cuttings And Slips, Unrooted	0	0	0	-100
106	Butter	1	0	0	
107	Sparkling Wine Of Fresh Grapes	0	15	0	-100
108	Meat Of Horses, Asses, Mules, Hinnies Fr, Chld, Fz	29	36	0	-100
109	Meat Of Swine Nesoi, Salted, In Brine, Dried, Smkd	0	11	0	-100
110	Mlk & Crm,Cntd,Swt,Powdr,Gran/Solids,Nov 1.5% Fat	0	0	0	-100
111	Mlk/Cream Cnctrd Nt Swtn Pwd/Oth Solids Ov 1.5% Fa	0	5	0	-100
112	Carcasses/Half-Carcasses Of Bovine Animals, Frozen	0	0	0	
113	Meat Of Bovine Animals, Boneless, Frozen	26	0	0	-100

114	Bulbs, Tubers, Corms, Crowns & Rhizoms Etc Dormant	0	0	0	
115	Edible Fruit Or Nut Trees, Shrubs And Bushes	0	0	0	
116	Cut Flowers And Flower Buds, Fresh	9,600	0	0	
117	Juice Of Any Single Fruit/Vegtble Unfermentd Nesoi	0	0	0	
118	Mixtures Of Fruit And/Or Vegetable Juices	0	0	0	
119	Vinegar & Substitutes For Vinegar From Acetic Acid	0	2,150	0	-100
120	Food Preparations Nesoi	0	66	0	-100

Source: Global Trade Atlas

Section V. Key Contacts

USDA FAS Contacts in Rome, Italy

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Key Italian Government Agencies and Associations

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(Ministry of Treasury)
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