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Report Highlights:

This report offers information for U.S. companies interested in exporting agri-food products to Italy, including an overview of the country's economic situation, market structure, export requirements, and market trends.

Market Fact Sheet: Italy

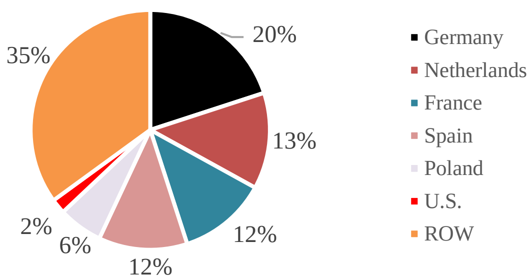
Executive Summary

Italy's economy is the eighth largest in the world and the third largest in the euro-zone, with a GDP estimated at $2 trillion and a per capita GDP of $40,236 in 2024. 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-oriented products to the United States, while the United States exports mostly bulk commodities to Italy. In 2024, U.S. agricultural exports to Italy were $1.7 billion, while U.S. imports from Italy were $8.9 billion.

Imports of Consumer-Oriented Products

In 2024, Italy's imports of consumer-oriented products were $38.3 billion, of which 84 percent originating from other EU member states. Imports from the EU were primarily dairy products, meat, and fruits and vegetables.

Imports of Consumer-Oriented Products, 2024



Food Processing Industry

The Italian food-processing industry is highly fragmented, characterized by a growing consolidation of smaller companies. Progress in food technology, marketing innovations, "Made in Italy" products, and exports of finished food products have all contributed to Italy's increasing demand for food ingredients. Italian consumers continue to favor baked goods, processed meat and seafood, and dairy products.

Food Retail Industry

The Italian food retail industry is highly diversified. Hypermarkets, supermarkets, convenience stores, major discount stores, and specialized stores coexist with traditional corner grocery stores and open-air markets. Italy's food retail sales reached $173.6 billion in 2024, up 0.7 percent compared to the previous year. Increased sales were registered in discounters (+5.8 percent), supermarkets (+3.6 percent), grocery retailers (+3.4 percent), and hypermarkets (+2.0 percent).

Quick Facts CY 2024

Imports of Consumer-Oriented Products: $38.3 billion

List of Top 10 Growth Products in Italy

1) Coffee
2) Vegetable Oils
3) Dairy Products
4) Beef
5) Food Preparations
6) Chocolate Confectionary
7) Tree Nuts
8) Processed Vegetables
9) Baked Goods
10) Sauces, Dressings, and Condiments

Food Industry by Channels ($ billion)

Food Exports	$63.5
Food Imports	$38.3
Retail Food	$173.6
Food Service	$90.8

Top 10 Italian Retailers

1) Conad
2) Esselunga SpA
3) Coop Italia
4) Crai Secom SpA
5) Selex Gruppo Comm.
6) Lidl Italia SpA
7) Gruppo VéGé
8) Gruppo Eurospin
9) Carrefour SA
10) Despar Italia

GDP/Population

Population: 58.9 million
GDP: 2 trillion
GDP per capita: $40,236

Strengths/Weaknesses/Opportunities/Threats	
Strengths	**Weaknesses**
Italy's food consumption levels are among the highest in the world.	Competition from EU countries that export to Italy tariff-free.
Opportunities	**Threats**
Italy is dependent on raw imports for its processed food industry. Italian food products have a reputation for being of high quality.	Non-tariff barriers, including traceability requirements, can hinder U.S. exports.

Data and Information Sources:
Trade Data Monitor (TDM), LLC; Euromonitor; industry contacts.

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SECTION I. MARKET OVERVIEW

Among EU-27 Member States, Italy is the fourth largest export destination for U.S. agricultural products, where U.S. sales valued a record $1.7 billion in 2024.

Italy's economy is the eighth largest in the world and the third largest in the euro-zone with an estimated GDP of $2 trillion and a per capita GDP of $40,236 in 2024. As a net agricultural importer, Italy utilizes raw materials and bulk commodities to support its strong food processing and livestock sectors. Annually, nearly half of Italy's agricultural imports, including those bought from the United States, are destined for processing. In 2024, U.S.-origin food processing ingredients to Italy reached $1.1 billion.

U.S. - Italy Agricultural Trade 2024

U.S. leading exports to Italy	Italian leading exports to the United States
Soybeans: $628.9 million	Wine: $2.4 billion
Tree Nuts: $362.8 million*	Baked Goods, Cereals, and Pasta: $1.2 billion*
Wheat: $187.1 million	Olive Oil: $1.05 billion
Seafood: $76.1 million	Condiments and Sauces: $810.6 million*
Pulses: $55.3 million	Dairy Products: $567.9 million*
Total: $1.7 billion*	**Total: $8.9 billion***

Source: BICO

*Denotes highest export/import levels since 1970

Advantages	Challenges
The tourism industry increases demand for hotel, restaurant, and institutional products.	Competition from similar EU-produced goods that enter Italy tariff-free.
U.S. style food is popular among the younger generation.	Negative attitude towards foods containing or made from biotech products.
U.S. food products are viewed as "trendy, new, and innovative," especially those with health benefits.	Limited presence of U.S consumer-oriented products in retail market.
Italians are becoming more interested in foreign cuisines.	Strong competition in the Italian market and many consumers prefer traditional Italian products.
Exchange rate fluctuations can make imports of U.S. products more competitive.	Mandatory customs duties, sanitary and phytosanitary, and labeling requirements are onerous.

SECTION II. EXPORTER BUSINESS TIPS

- Identify a key importer, broker, distributor, agent, or wholesaler, as they know how to best navigate the import and distribution process. Italian importers are mostly small to medium-sized companies and normally work across several product categories.
- Survey existing and potential opportunities by reviewing FAS GAIN reports and consider retaining a market research firm to assist in analyzing market opportunities and challenges.
- Price is always important, although quality and novelty alone can move some imported products.
- Be prepared to ship limited volumes when first entering the market. Italians place high importance on building trust within their business relationships.
- Scrutinize the purchasing procedures of the larger retail channels.
- Recognize special EU labeling requirements and consider working through a consolidator or participating in mixed container shipments.
- Participation in some of the larger European international food trade shows (ANUGA, SIAL, and TUTTOFOOD) which provide a sense of the Italian market and the opportunity to meet Italian importers or distributors.

General Consumer Tastes and Trends

- Dining out remains a popular activity among Italian consumers and tourists alike.
- Hybrid work models have reduced spending on breakfasts and lunches.
- Health and wellness is a major consideration, and younger Italians are more open to global food trends.
- Demand for convenience in food products is growing with an uptick in the consumption of snacks, quick meals, and takeaway.
- Consumers are becoming more health conscious. Healthy options made their way onto menus and greater attention continued to be paid by food service operators to food intolerances and allergies, as they offered menus dedicated to consumers with specific health and dietary needs.

SECTION III. IMPORT FOOD STANDARDS, REGULATIONS AND PROCEDURES

As a member of the EU, Italy applies the "*Community Acquis*", i.e., the entire body of EU laws and regulations associated with the treaties and international agreements to which the EU is a party. EU member states share a customs union, a single market in which goods can move freely, a common trade policy, and a common agricultural and fisheries policy. Products imported into Italy must meet all Italian and EU food safety and quality standards, as well as labeling and packaging regulations. Italy's Ministry of Health is responsible for food safety, while food production falls under the Ministry of

Agriculture. Italy's Ministry of Enterprises and Made in Italy covers standards, labeling, and trade promotion, and the Ministry of Economy and Finance is responsible for customs and duties.

For more information, see the latest *Italy Food and Agricultural Import Regulations and Standards (FAIRS)* and *Italy FAIRS Certificate* reports at: https://gain.fas.usda.gov/#/ and FAIRS reports produced by the U.S. Mission to the EU in Brussels, Belgium that are available at: https://usda-eu.org/reports/fairs-report/.

Most imported food products enter the Italian market through brokers or specialized traders. Imported products from North America often enter Italy indirectly from the Port of Rotterdam or via air cargo. Italian importers and distributors an in-depth knowledge of import requirements, such as product certification, labeling, and packaging. They also typically handle shipping, customs clearance, warehousing, distribution, and occasionally promotion. American exporters who can assist in consolidating shipments from other U.S. sources or have a wide range of products for export have a greater chance for success in the Italian market.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Italian Food Processing Ingredients Sector

Italy depends on imports of raw agricultural products for its food processing sector, most of which are sourced from other EU countries. Some principal ingredients include dairy, meat products, and wheat for pasta. While there is some ongoing consolidation of smaller food processing companies by larger players, the Italian food processing industry continuous to be highly fragmented. Italy's food processing industry accounts for more than 55,000 enterprises that contribute $156.5 billion to the country's gross domestic product. Annually, approximately 47 percent of Italy's agricultural products imports are destined for food processing. In 2024, the U.S. ranked 11th supplier to Italy registering food processing ingredients exports valued at $1.1 billion. For additional information, see *Italy Food Processing Ingredients 2025* report at: https://gain.fas.usda.gov/#/

Italian Food Retail Sector

The Italian retail food market is highly diversified. Hypermarkets, supermarkets, convenience, discount, and specialized stores coexist with traditional corner shops and open-air markets. The majority of supermarkets are located in northern Italy, followed by the south, and then the central region. Convenience stores and small supermarkets are commonly located in central locations of towns and cities. Hypermarkets and supermarkets tend to be positioned within large shopping malls in suburban areas and on the outskirts of cities.

Italy's food retail sales reached $173.6 billion in 2024, a 0.7 percent increase from 2023. Increased sales were registered at discount stores (+5.8 percent), supermarkets (+3.6 percent), grocery retailers (+3.4 percent), and hypermarkets (+2.0 percent). Supermarkets is the grocery retailers' channel with the highest penetration in Italy. 2024 was a relatively good year for supermarkets with the sector seeing an increase in the number of outlets as well as growth in current value terms. Despite a growing e-commerce trend, physical supermarkets remain important for local consumers, especially older consumers who appreciate face-to-face contact with sales staff. Nonetheless, innovation and investments as part of an omni-channel strategy remain key to remaining competitive in the Italian market. For additional information, see *Italy Retail Foods 2024* report at: https://gain.fas.usda.gov/#/

Italian Food Service – Hotel, Restaurant, Institutional

Consumer foodservice in Italy registered a relatively positive performance in 2024, up by 1.7 percent, with an increasing number of outlets, transactions and moderate growth in value terms. Italy's tourism sector registered 129.3 million visitors in 2024 (down 3.3 percent from the previous record year) which significantly contributed to the expanding consumer food service industry.

The sector faced challenges in 2024 that were linked to the lingering impact of the pandemic, which had a huge negative impact on the industry, and the subsequent high inflation and cost of living crisis. Additionally, geopolitical issues have also impacted the market, reducing the consumer confidence and available income. Large price gaps between premium and value consumer goods forced many Italians to reduce their discretionary spending and focus on primary need expenditures. In this context, Italy's food service industry adopted strategies to operate in a tight economy by offering attractive promotions, improving their menu options and dining experience, and catering to consumers with specific health and dietary needs (e.g. celiac, vegan, and vegetarian). Furthermore, restaurant and hotel dining are centerpiece activities among Italian consumers and tourists who utilize the experience as a form of entertainment and socializing.

For more information, see *Italy Food Service – Hotel Restaurant Institutional 2024* report at: https://gain.fas.usda.gov/#/

➢ Competitive situation for select imported products

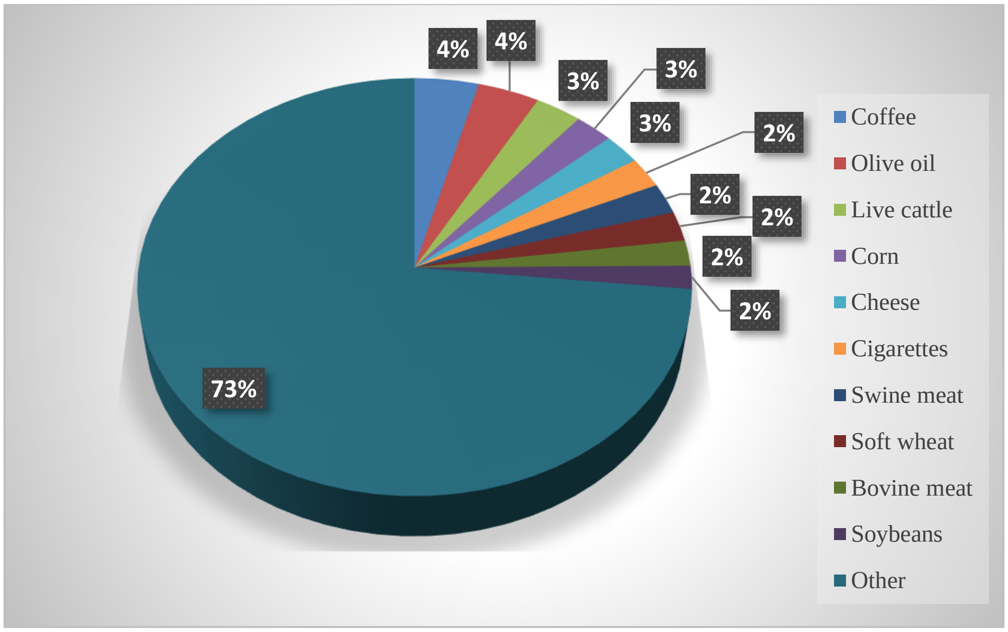
Commodity	Italy's imports from the world 2024	Italy's imports from the United States 2024	Key constraints over market development	Market attractiveness for the United States
Pork meat and products	$3.5 billion	$515,119	Competition from Germany, Spain, the Netherlands, and Denmark	Growing consumer demand.
Coffee	$2.7 billion	$28,917	Competition from Brazil, Vietnam, Uganda, and India.	In 2024, Italy's coffee imports increased 26.8% from the previous year.
Bakery goods	$2.1 billion	$15.6 million	Competition from other EU countries, mainly Germany, France, Austria, and Spain.	U.S. bakery goods exports to Italy significantly increased in 2024.
Tree nuts	$1.8 billion	$432.3 million	Competition from Turkey, Spain, Chile, and Germany.	Growing demand from manufacturers, confectionary, and snack industry.
Corn	$1.6 billion	$4.1 million	Competition from Ukraine, Slovenia Hungary, and Croatia.	Strong demand from feed processing industry.
Wheat and meslin	$1.5 billion	$87.4 million	Competition from Hungary, Canada, Austria, and Ukraine.	Food processing industry among top European industries.
Soybeans	$1.2 billion	$330.9 million	Competition from Brazil and Canada.	Strong demand from feed processing industry.

Source: Trade Data Monitor LLC

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Top 10 Agricultural Products Imported by Italy in 2024

(Total Imports in 2024: $66.9 billion)



Best consumer-oriented product prospects based on growth trends

Commodity	Total imports, $ billion, 2024	U.S. market share, 2024	Estimated average annual import growth
Dairy products	6.3	0.01%	5%
Beef and beef products	2.9	1.4%	5%
Processed vegetables	2.3	2%	7%
Bakery goods, cereals, & pasta	2.1	0.7%	10%
Chocolate and cocoa products	2.1	0.02%	15%
Tree nuts	1.8	23.8%	10%
Distilled spirits	1.1	25.2%	10%

Export Market: *Italy(*)*

U.S. Exports of Agricultural & Related Products to *Italy(*)*
CY 2020 - 2024 and Year-to-Date Comparisons
(in millions of dollars+)

Product	2020	2021	2022	2023	2024	January - April Comparisons 2024	2025	%Chg
Bulk Total	466.0	439.7	602.4	860.6	895.2*	269.8	233.6	-13.4
Wheat	216.0	112.7	136.3	111.2	187.1	52.5	36.3	-30.8
Corn	0.0	0.0	17.4	5.2	3.5	3.5	12.7	263.6
Coarse Grains (excl. corn)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Rice	1.0	0.3	0.3	0.4	0.4	0.3	0.2	-44.7
Soybeans	178.0	258.5	371.9	653.6*	628.9	187.7	154.4	-17.7
Oilseeds (excl. soybean)	0.0	0.0	0.5	0.0	0.0	0.0	0.0	-
Cotton	8.0	9.4	7.1	5.5	6.7	2.2	2.1	-4.7
Pulses	39.0	46.7	53.8	65.0*	55.3	20.0	16.4	-18.3
Tobacco	15.0	4.2	6.0	12.0	6.3	1.1	8.4	631.3
Other Bulk Commodities	8.0	7.9	9.0	7.7	6.9	2.4	3.1	30.5
Intermediate Total	127.0	143.9	136.5	120.5	150.3	80.5	51.1	-36.5
Milled Grains & Products	0.0	0.4	0.5	0.6	0.4	0.3	0.2	-29.2
Soybean Meal	0.0	20.8	0.1	0.0	33.1	33.1	0.0	-
Soybean Oil	0.0	0.1	0.4	0.1	0.0	0.0	0.0	-
Vegetable Oils (excl. soybean)	3.0	1.2	1.4	2.6	2.1	0.6	5.4	774.9
Animal Fats	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Live Animals	2.0	1.2	1.8	2.0	2.2	0.7	0.6	-7.7
Hides & Skins	17.0	16.9	35.9	33.9	10.5	5.5	5.1	-8.1
Hay	0.0	0.3	0.2	0.0	0.0	0.0	0.0	-
Distillers Grains	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Feeds, Meals & Fodders	8.0	7.8	6.7	8.2	8.1	3.1	4.3	40.0
Ethanol (non-bev.)	1.0	3.6*	2.0	0.7	1.7	0.6	0.0	-
Planting Seeds	57.0	56.2	43.7	41.8	40.7	13.5	15.9	17.4
Sugar, Sweeteners, Bev. Bases	2.0	1.8	2.8	1.3	5.1*	0.4	0.7	68.9
Dextrins, Peptones, & Proteins	1.0	1.7	2.5	1.6	1.3	0.5	1.6	241.5
Essential Oils	6.0	7.4	10.0	8.9	13.4*	6.5	6.7	2.6
Other Intermediate Products	29.0	24.6	28.4	18.8	31.8	15.6	10.5	-32.6
Consumer Oriented Total	443.0	448.7	415.1	473.3	536.5	180.7	230.4	27.5
Beef & Beef Products	11.0	19.0	28.9	40.0	37.3	13.0	13.8	6.3
Pork & Pork Products	0.0	0.7	0.2	0.0	0.3	0.0	0.0	-
Poultry Meat & Prods. (excl. eggs)	0.0	0.2	0.6	0.6	0.7	0.5	0.1	-87.6
Meat Products NESOI	0.0	0.2	0.2	0.0	0.1	0.0	0.0	90.5
Eggs & Products	1.0	0.3	0.1	1.0	1.2	0.5	0.2	-57.6
Dairy Products	1.0	0.6	0.9	0.5	0.7	0.1	0.3	142.7
Fresh Fruit	0.0	0.0	0.0	0.0	0.1	0.0	0.0	-
Processed Fruit	11.0	13.7	19.8	10.4	12.4	4.7	4.3	-10.5
Fresh Vegetables	0.0	0.8	0.2	0.1	1.2	0.4	0.3	-26.9
Processed Vegetables	38.0	21.9	14.4	24.9	51.4	20.7	10.1	-51.4
Fruit & Vegetable Juices	1.0	0.5	0.5	0.6	0.7	0.2	0.4	88.6
Tree Nuts	314.0	321.2	276.5	314.9	362.8*	113.4	158.6	39.9
Confectionery	2.0	1.3	0.3	0.4	0.1	0.0	0.1	2074.1
Chocolate & Cocoa Products	0.0	0.3	0.4	0.4	0.4	0.2	0.0	-79.4
Bakery Goods, Cereals, & Pasta	1.0	1.1	1.5	1.4	0.8	0.3	0.3	6.0
Food Preparations	14.0	16.4*	14.7	14.4	15.2	5.5	4.1	-25.3
Condiments & Sauces	2.0	2.8	2.4	3.3*	2.7	1.0	1.4	34.4
Non-Alcoholic Bev. (excl. juice)	2.0	1.7	2.2	2.3	1.4	0.5	0.6	19.5
Beer	1.0	2.2	1.5	1.1	0.8	0.2	0.2	-19.9
Wine & Related Products	1.0	2.0	4.1	3.3	3.5	1.1	1.5	37.2
Distilled Spirits	41.0	40.6	44.4	48.2*	38.4	15.6	32.8	110.3
Nursery Products & Cut Flowers	0.0	0.5	0.2	1.1	0.6	0.0	0.9	5438.9
Dog & Cat Food	1.0	0.6	0.8	0.4	1.1	0.4	0.2	-56.6
Other Consumer Oriented	1.0	0.3	0.6	3.6	2.9	2.3	0.4	-82.3
Agricultural Related Products	96.0	147.3	199.9	156.3	129.6	42.8	42.4	-0.9
Biodiesel & Blends > B30	0.0	0.0	0.0	0.2	0.0	0.0	0.0	-
Forest Products	56.0	84.2	115.3	78.9	53.5	20.7	22.3	7.8
Seafood Products	40.0	63.1	84.5	77.2	76.1	22.1	20.1	-9.1
Agricultural Products	1,035.0	1,032.3	1,154.0	1,454.4	1,582.0*	531.0	515.2	-3.0
Agricultural & Related Products	1,131.0	1,179.7	1,353.9	1,610.6	1,711.6*	573.8	557.6	-2.8

Prepared By: Trade & Economic Analysis Division/GMA/FAS/USDA
Source: U.S. Census Bureau Trade Data

* Denote Highest Export Levels Since at Least CY 1970

www.fas.usda.gov/GATS
GATSHelp@fas.usda.gov

Biodiesel aggregate includes only higher-level and pure biodiesel HTS chapter 38 codes; biodiesel blends below 30% by volume (aka. petroleum oils containing biodiesel) found in chapter 27 are excluded.

SECTION VI. KEY CONTACTS AND FURTHER INFORMATION

FAS Italy publishes numerous market and commodity reports available through the Global Agricultural Information Network (GAIN) at: https://gain.fas.usda.gov/#/

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For more detailed U.S. trade statistics, check USDA's Global Agricultural Trade System (GATS): https://apps.fas.usda.gov/gats/default.aspx

Attachments:

No Attachments