Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Required Report - public distribution

Date: 9/27/2002

GAIN Report #IT2021

Italy

Fishery Products

Annual

2002

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Report Highlights: With a population of 58 million and an annual per capita consumption of about 23 kg of fish and seafood, Italy is the world's fifth biggest importer of these products. After two annual increases in domestic demand for fish products, last year household consumption slightly decreased by 1.2 percent in quantity, while the value increased by 3.5 percent. The Italian fishing fleet catch continues to decline while aquaculture is growing modestly. Italy imports $2.7 billion of fish and seafood yearly. Imports from the U.S. totaled about $46. Half of Italy's seafood imports come from EU member states, particularly Spain.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Rome [IT1], IT

EXECUTIVE SUMMARY . . . . Page 2 of 36
PRODUCTION . . . . Page 3 of 36
Marine fisheries . . . . Page 3 of 36
Table: Italian Fishing Activity . . . . Page 4 of 36
Table: Total Italian Seafood Production, 2000 . . . . Page 5 of 36
Inland fisheries . . . . Page 5 of 36
Fish Farming - Aquaculture . . . . Page 6 of 36
Outlook for Aquaculture . . . . Page 7 of 36
Table: Italian Aquaculture Production by Species (Tons), 2000 . . . . Page 8 of 36
Processing Industry . . . . Page 8 of 36
Table: Italian Fish Canning Industry - Production, 2000 and preliminary 2001 Page 9 of 36
Table: Leading Italian Fish Canning Industries by Name and Turnover (1999) Page 10 of 36
Frozen Seafood Sector . . . . Page 10 of 36
Table: Frozen Seafood Sales (MT) Year 2001 (% 2001/2000) . . . . Page 11 of 36
Distribution Channels and Marketing in Italy . . . . Page 11 of 36
Table: Italy: Sales Channels for Fish Products, 2001 (%) Estimates . . . . Page 13 of 36
Table: Fish Products Sales Channels, 2001 . . . . Page 14 of 36
CONSUMPTION . . . . Page 15 of 36
Table: Italian Household Consumption of Seafood, CY 2000 and CY2001 . . . . Page 16 of 36
Table: Italian Household purchase of Fresh Seafood - Marine Fish , 2001 . . . . Page 17 of 36
Table: Italian Household purchase of Fresh Water Fish 2001 . . . . Page 18 of 36
Table: Italian Household purchase of Fresh Mollusks, 2001 . . . . Page 18 of 36
Table: Italian Household Purchase of Fresh Crustaceans, 2001 . . . . Page 19 of 36
TRADE . . . . Page 19 of 36
Trade Trends . . . . Page 19 of 36
Table: Average price for Imported Products, CY 2000 and 2001 . . . . Page 20 of 36
Table: Italian Fish Trade, 2001 . . . . Page 20 of 36
Table: Italian Fish Trade, 2001 by Category . . . . Page 21 of 36
Table: Italian Fish Trade, 2001 by Countries . . . . Page 22 of 36
Table: Italian Fish Trade with the U.S. , 2001 by Category . . . . Page 23 of 36
Potential Growth Markets for Seafood Products . . . . Page 23 of 36
General Factors Affecting U.S. Trade . . . . Page 25 of 36
POLICY . . . . Page 26 of 36
LOBSTERS PSD TABLE . . . . Page 27 of 36
Production . . . . Page 28 of 36
Consumption . . . . Page 28 of 36
Trade . . . . Page 28 of 36

ITALIAN EXPORTS OF LOBSTERS . . . . Page 29 of 36
ITALIAN IMPORTS OF LOBSTERS . . . . Page 30 of 36
SQUID PSD TABLE . . . . Page 31 of 36
Production . . . . Page 32 of 36
Consumption . . . . Page 32 of 36
Trade . . . . Page 32 of 36
ITALIAN EXPORTS OF SQUID AND CUTTLEFISH . . . . Page 33 of 36
ITALIAN IMPORT OF SQUID AND CUTTLEFISH . . . . . Page 34 of 36
FISH STRATEGIC INDICATOR TABLE . . . . Page 35 of 36

EXECUTIVE SUMMARY

In 2001, the BSE crisis had a positive effect on Italian fish consumption, but only for the first three months of the year. This positive trend didn't continue due to various factors including a retail price increase and a negative media campaign against farm-reared products. The annual per capita consumption is established at about 23 kilograms (Kg). Italy is a net importer of seafood products and the Italian trade deficit is expected to increase. Seafood consumption and imports are linked to the general economic climate in the country.

The internationalization of trade, especially through the free market inside the EU, has generated great competitiveness in fisheries markets. The prices of domestic products have dropped to compete with cheaper imports with lower unit costs. These imports are often cheaper due to the lower operating costs of fleets in northern seas or in developing countries and to the organoleptic characteristics of such production. Because of the wide sales margins of imported products, national fishery enterprises find it difficult to compete on the market.

The commercial and institutional catering sector is the largest outlet for fish consumption in Italy. Modern distribution is also increasingly playing an important role in the distribution and consumption of seafood products in Italy.

Total Italian fish imports in 2001 increased both in quantity and in value. Their respective increases were 7.5 percent and 11 percent reaching an equivalent of US $2.67 billion.
Almost half of Italy's seafood imports come from other EU member states. Spain is by far the leading supplier accounting for more than 21 percent (by volume) of total Italian imports.

Italian imports from the United States decreased during 2001 by 17 percent mainly due to the strong dollar relative to the Euro and the decrease in imports of squid. US export prices were also up making the US product less competitive. Major exports to Italy were: live lobsters, frozen squid, frozen salmon, frozen surimi, and surimi paste. Salmon continues to face stiff price competition from northern European countries and Chile. While the market for lobster and squid is stable and mature the market for surimi is young and expanding quickly. Whitefish fillets, cod and dogfish could improve their presence in the market. Another growing opportunity is private label products for major supermarket chains. which have begun to sell products under their own labels in order to obtain a higher profit margin.

A recent survey indicates that consumers are indeed willing to pay the price for products perceived as being superior in quality and providing assurance of meeting safety criteria.
Italian consumers prefer seafood products of higher quality which meet more demanding specifications for size, color, and lower bacteria counts. Consumers are also looking for convenient, already cleaned and easy to prepare products.

Exchange rates used in this report are as follows:
2000: $1 = ¡ 1.09
2001: $1 = ¡ 1.12

PRODUCTION (Aquaculture/Wild Catch)

Marine fisheries

The protection of resources at EU and national levels has led to the establishment of specific regulations to monitor and limit catches. This policy resulted in Multi-Annual Guidance Programs and part of the EU Common Fishery Policy which will expire at the end of 2002. The EU has already admitted the failure of this policy referring to problem issues such as depletion of commercial fish stocks, excess fleet capacity, illegal fishing and others. In Spring of 2001 the EU proposed a "Green Paper" on the future of the CFP. The Green Paper is intended to stimulate debate with all sectors of the fishing industry and contains concrete proposals for the regionalization of fisheries management whereby the fishermen's organization will become responsible for the implementation of stock management programs in their own areas. Reaction from various parties in Italy have been positive on this proposal.

The Italian fishery sector presents the following characteristics: predominance of small and relatively old vessels, wide distribution of the fleet along the 8000 km coastline, fragmentation of landing sites and sales, and adaptability to multiple uses.

Fishing in Italy is multi-species and multi-gear (there are many types of gear competing on multi-species stocks simultaneously.) There are a large number of vessels using combinations of gear grouped in the multipurpose class (about 80 percent of the total). Moreover, each type of equipment competes in catching more than 140 commercial species. Many of the fishing techniques belong to the small scale artisan fisheries segment; however, this artisan management of the boat guarantees the necessary flexibility to have stable volume of catch and income.

Table: Italian Fishing Activity

	2000	% Change 00/99
Number of Vessels*	18,390	-7.1
GRT (Gross Registered Tonnage)	207,550	-9.8
Total Engine Power (KW)	1,404,929	-8.4
Fishing Activity (Number of days)	3,077,816	-4.0
Average GRT	11.3	-2.9
Average Engine Power	76.4	-1.4
Average Fishing days	167.4	3.3
Source: IREPA		
Note: *The above data does not include 30 vessels for high-seas or distant water fishing.		

There are just over 802 landing ports equipped for fishing boats. Among these, only 25 percent are harbors in the strict sense of the word, the rest are mooring sites where the catch is landed and sometimes sold. There are 80,000 fishermen in Italy but only 52,000 are full time/preliminary sector while the remainder belongs to the secondary sector. Fishing cooperatives account for more than 80 percent of Italian production. Fishing has been for years a traditional vocation and still has a social-economic impact in costal communities where alternative jobs are not easily available and some qualified fishermen are facing economic hardships.

The Italian commercial fish catch (wild catch and aquaculture) during 2000 equaled 666,884 MT, 2.0 percent lower than the previous year. Over the past five years, the decrease in total Italian catch has remained relatively constant. It is expected that this trend will continue in the future.

Table: Total Italian Seafood Production, 2000 (the latest data available)

	M.T.	% Change 00/99	Value Million USD	Average value (USD/Kg)
Mediterranean catch	392,285	-5.8	1,426	3.63
of which: Anchovies	62,543	9.5	83	1.31
Pilchards	31,778	-25.1	18	0.58
Others	170,766	-9.2	722	4.23
Clams	27,953	-19.6	54	1.94
Mussels *	63,203	5.0	265	4.20
Crustaceans	36,042	6.5	284	7.90
Mytilidae (natural banks)	30,000	0.0	16	0.52
Oceanic Catch	17,000	0.0	36	2.11
TOTAL WILD CATCH	439,285	-5.2	1,477	3.36
Fish Farming	68,600	1.9	256	3.76
Shellfish farming	159,000	6.0	183	1.16
TOTAL AQUACULTURE	227,600	4.7	441	1.93
GRAND TOTAL	666,885	-2.0	1,919	2.88
Exchange rate $1= **i** 1.09 * clams not included				

The catch in the Mediterranean Sea during CY 2000 continued to decline (- 5.8 percent).
The quality of the catch has worsened with an increase of poor marketing value species (pesce azzurro) and a decrease of the white fish species.

Inland fisheries

Italy has about 20,000 km2 of inland water, including rivers, lakes, reservoirs and brackish water lagoons. Both commercial and sport fishing take place on these waters. Most inland waters are regularly restocked. Freshwater lakes and reservoirs produce about 9,000 mt of fish.

Fish Farming - Aquaculture

Aquaculture production - freshwater fish and marine - makes a large and growing contribution to the economics of rural and marine regions of Italy and helps toward decreasing the negative balance of the fish trade. Italian aquaculture is characterized by the variety of both cultured species and production strategies. Aquaculture is mainly concentrated in norther Italy where 75 of the farms are located. The main cultured fin fish species are trout, eel, seabass and gilt bream; molluscs cultured include Mediterranean mussels and Japanese carpet shell clams.

Italy has an ancient tradition of extensive culture of euryhaline species in coastal lagoons, but increases in aquaculture production over the last ten years have been mainly due to the development of intensive practice in the culture of sea bass, gilthead sea bream and Japanese carpet shell clams. Nevertheless, more than half of total aquaculture production comes from extensive practice. Mullets are still cultured almost entirely by extensive techniques.

Mussels are cultured both on the traditional ropes suspended on poles in protected coastal areas and lagoons, and in open sea on long-line systems. Production of carpet shell clams grew significantly between the mid 1980s and the beginning of 1990, thanks to the introduction of new techniques and artificial restocking with the Japanese carpet shell in the brackish waters of the Po Delta, Trieste Gulf and the Venetian lagoon system which has almost displaced the autochthonous clam.

The intensification of acquaculture techniques has also led to the establishment of a certain number of hatcheries. The Italian supply of juveniles for CY 2000 is estimated in 90 million units: 50 million for sea bass and 40 million for gilt head sea bream. While Italian hatcheries have been able to export some fingerlings to Greece for sea bass and sea bream production, in Italy there is a lack of production of elvers for eel farms; the cost of the rearing of elvers weigh upon the final cost by about 50 percent. Reportedly some hatcheries prefer to send them to Japan for human consumption where quotations are very high. Eel production in Italy dropped by 15.2 percent in CY 2000.

Farm rainbow trout was considered the most important farmed product from an economical point of view. Recently the production is facing tougher competition from imported fresh salmon from marine aquaculture.

Total aquaculture production has been regularly increasing during the past years reaching 257,600 MT in CY 2000. This trend is expected to continue in the future.

Production costs for Italian fish farming are high compared to other European countries such as Greece, which now ranks first within the EU in farmed sea bream and sea bass. Two thirds of these species are exported mainly to Italy and other EU countries. However, Italian farmers have also decided to face foreign competition by increasing production, improve quality standards and diversification of product size in order to meet consumer preferences. The decision to switch to larger-sized products will increase production costs but will at the same time obtain a more remunerative product.

Outlook for Aquaculture

The freshwater aquaculture production sector is influenced by two major factors: the climate and the water availability at a specific site. While water limitations have traditionally governed the maximum production capacity, environmental legislation on waste loading has largely replaced water availability as the criterion. These limitations have generally restricted corporate growth; consequently Italy is dominated by family owned and operated units.

Marketing problems associated with aquaculture products include low prices, lack of reliable commercial information, a limited product range based on a small number of species and products (not always suitable to modern market requirements), difficulties in diversification and lack of promotion. Another key measure affecting trade in the future will be rules health and safety governing fisheries - mainly aquaculture products. There is increasing attention paid to feedstuffs, veterinary drug residues (in particular antibiotics) and contaminants.

Fish farmers must be more attuned to changing market requirements. Current trends among consumers towards traditional, "genuine" or more convenient foods is also reflected in the demand for aquaculture products. These are increasingly required to be organic or at least consumer-friendly, filleted, packaged or part of a ready meal rather than whole gutted fish. A more aggressive attitude towards improving the image of farmed fish products to consumers and to the institutional food service market could increase sales volume.

The demand for organically produced aquaculture products is slowly increasing; however, certification is still based on the standards of private certification bodies. It is expected that a minimum set of common standards for organic aquaculture will be produced at the European level in the near future.

Table: Italian Aquaculture Production by Species (Tons), 2000

Species	2000 M.T.	% Change 00/99	2001 * (preliminary) M.T.
Sea bass	8,100	12.5	9,550
Sea bream	6,000	5.3	7,650
Sargo	400	14.3	
Gray Mullet	3,000	0.0	
Eel	2,700	-15.6	2,500
Trout	44,500	1.1	44,000
Catfish	550	-26.7	
Carp	700	0.0	
Sturgeon	550	22.2	
Others	2,100	5.0	
Total Finfish	68,600	1.9	
Mussels	136,000	4.6	
Carpet shells	53,000	6.0	
Total Bivalves**	189,000	5.0	
Grand Total	257,600	4.1	

Source: FEAP, API, ICRAM
* Preliminary FEAP data
** Total of bivalves includes wild catch Mytilidae (natural banks) (o/a 30,000 mt) output from aquaculture

Production

Processing Industry

There are two major processing types of industries in Italy: the canning, smoking, and preserving fish industry and the freezing industry.

Cured, Canned and Prepared Seafood

According to ANCE (Italian Association of Canned Seafood Products) the total production for the sector reached 120,000MT (2% over the past year) for a value of USD 625 million.

The Italian tuna processing industry is the third largest in the world and uses about 104,000 MT of raw materials of which almost all is imported. In order to cut production costs, tuna processors have been switching their purchases to frozen tuna loins, vacuum packed and pre-cooked thus making substantial savings on labor costs. Italy's own catch of tuna of approximately 8,000 MT a year is high priced bluefin tuna and is consumed fresh on the domestic market of exported to Japan. The Italian tuna industry is not price competitive but tends to provide a high quality product suited to local taste. Eighty five percent of the market is tuna in olive oil and only 12 percent is in brine.

The canned anchovy (salted and in oil) industry has increased production in order to meet domestic demand. As a consequence of the decreased anchovy catch in Italian waters, processors have had to import salted anchovies from Greece, Spain, Turkey and Argentina.

The canned sardines in oil processing industry is stable after the steep drop of recent years. Per capita consumption is very low and competition from North African countries is heavy.

Table: Italian Fish Canning Industry - Production, 2000 and preliminary 2001

Products	MT 2000	% 00/99	Million USD	MT 2001	% 01/00	Million USD
Tuna in oil	80,000	-10.1	348	85,000	6.2	366
Sardines in oil	2,000	11.1	7	2,000	0.0	7
Salted Anchovies	11,000	0.0	49	11,500	4.5	51
Anchovies Fillets in oil	8,300	3.8	52	8,500	2.4	55
Canned Clams	2,500	4.2	17	**n/a	n/a	n/a
Other fish preparations Incl. marinated, natural	14,600	5.8	142	**n/a	n/a	n/a
Total	118,400		613	120,000		625
Source: Ancit ** Detailed data for canned clams and other fish preparations is not available.						

Table: Leading Italian Fish Canning Industries by Name and Turnover * (1999)

Name of Company	Turnover Million US $	% Change 99/98
Star Stabilimento Alimentare	517	0.0
Trinity Alimentare Italia	263	8.2
Nostromo SpA	n/a	n/a
Palmera SpA	83	15.4
Giolfo & Calcagno SpA	61	5.8
Iginio Mazzola SpA	n/a	n/a
Mediterranea Pesca	34	n/a
Coalma	29	15.2
Taranpesca	25	-18.2
Delicious Rizzoli S.p.A.	19	6.3
Veneta Pesca	19	6.3
Sud Pesca S.r.l.	n/a	n/a
Amati Riccione SpA	18	-23.3
Calippo Giacinto Cons. Alim. SpA	18	18.5
La Nuova Pesca S.r.l.	17	6.9
Daunia Food	14	-24.2
Exchange Rate 1999 1 $ = .92 i		
Source: Largo Consumo Turnover is referred to the Company's whole production		

Frozen Seafood Sector

Frozen products and in particular frozen fish is a growing industry. The introduction of a fishing fleet with refrigerated systems, the improvement of the distribution chain for frozen products, the implementation of educational program for retailers on handling and storing frozen fish and advertising campaigns targeted to stimulate growth in consumption have all generated a growing demand for frozen fish products.

According to IIAS, the Italian Frozen Food Institute, the total domestic frozen fish consumption in 2001 amounted to 67,400 MT (+5.1%) for fish products while frozen mollusks and crustaceans amounted to 26,350 MT (+10%). The Italian frozen seafood processors produce about one third of the total national consumption of frozen fish (excluding clams). Not included in the above totals are fish-based prepared/frozen products such as fish soups, fish and rice dishes (risotto alla marinara), etc. Consumption of frozen meals (fish, vegetable or rice based) during 2001 registered a 15 percent increase compared to the previous year - reaching a total of 60,820 MT. These frozen meals are becoming more widely accepted due to some positive observations by consumers. These are: the products are of good quality; there are many varieties; they use natural ingredients; and they are very versatile.

The frozen food market is dominated by a few large companies. Sagit/Unilever is the market leader in Italy with the Findus brand, followed by Nova with the Mare Pronto and Brina brands, Nestle (Buitoni) and Orogel. Home deliveries are slowly increasing their market share. The market is dominated by Bo Frost followed by Novagel.

U.S. frozen seafood products could increase their market share mainly in the natural frozen fillets sector, predominantly with groundfish species, such as hake and cod. In addition U.S. frozen cooked spiny lobsters, king crabs, and frozen valued-added cephalopods could increase their presence in the frozen section of Italian supermarkets. Frozen surimi for the canning and catering sectors are promising. Italy's imports of frozen surimi for 2001 reached 1,271 MT; the U.S exported 859 MT.

Table: Frozen Seafood Sales (MT) Year 2001 (% 2001/2000)

Products	Retail	%	Catering	%	Total	%
Frozen Fish	57,850	5.0	9,550	6.1	67,400	5.1
Natural Frozen	33,700	11.8	3,000	0.0	36,700	10.7
Breaded Fish	24,150	-0.3	3,380	9.0	27,530	-1.9
Others	0		3,170	9.3	3,170	9.3
Molluscs and Crustaceans	21,000	9.7	5,350	12.6	26,350	10.3
Total	78,850	11.6	14,900	12.6	93,750	12.1
Source: IIAS, 2002						

Distribution Channels and Marketing in Italy

There are no major changes in the Italian extensive network of seafood distribution from landing sites to final consumers.

Fishery and aquaculture products are distributed by wholesale fish traders and only a part is sold directly by fishermen or farmers. Nationally, there is no overlap between products from aquaculture and fisheries, because the volumes of catches of cultured species do not represent any competition on the market, and capture fisheries mainly target species which are not suitable or profit-making for aquaculture.

Wholesalers take possession of fish at landing and transport it directly to consumers, restaurants, fish mongers and the canning industry, or sell it to another smaller wholesaler. This catch is then resold fresh/chilled or frozen and prepacked if it is to be exported. Imported live/fresh fish (like U.S. live lobsters) are brought in principally by air using the Milan and Rome airports, but local catch landed in Sicilian ports can reach the Milan market the following morning by truck. Half of the catch is sold through traditional fish markets.

There are eight major fish markets - which also act as dispatching agents. In Italy there are over 1,000 companies registered as fish wholesalers. Of these 100 can be also considered importers and about 20 are shareholders in vessels operating in major fishing countries. The companies are of various size from the small to the largest ones, which own fishing fleets in other countries.

Some traders avoid fish markets and ports registration authorities in order to evade required administrative and phytosanitary formalities. In addition, wholesale markets are often located far from the landing ports and are inconvenient to use. Traders fear that going through the markets (i.e. official distribution channels) could mean a delay in delivery and subsequently an increase in cost.

A number of agents (Italian and foreign) are also very active on the Italian market in providing their customers (wholesalers, industry processor and fish importers) with large quantities of fishery products. There are about 150 freezer centers located in Italy which have helped to increase the availability of frozen fish on the markets. Private networks of importers and wholesalers distribute more than 95 percent of all frozen fish products.

Despite the growing share of hypermarkets and supermarkets in fish distribution in Italy, the role of the local fish shop is still important due to the high level of personalized services they provide. The fish shops are, with the exception of some mega-stores, are too small to import directly and choose to buy from local wholesalers, either operating in fish markets or outside of the markets. The future role of local fish shops could be penalized by the fresh/wet stands in super/ hypermarkets.

The number of large supermarkets with fresh/wet fish stand continues to increase. The variety and quality of fish products is generally wide and nicely displayed. The retail services provided by wet fish stands at modern distribution (cleaning, cutting, filleting) is increasing.

Modern distributors receive frozen fish in consumer-ready packages from importers and wholesalers. Supermarkets normally offer a wide variety of frozen seafood including value-added products. Also frozen shellfish reaches the final consumer primarily through supermarkets and small retail outlets which sell exclusively frozen foods.

Table: Italy: Sales Channels for Fish Products, 2001 (%) Estimates

Purchasing Point	Total Fish Products	Fresh & Defrosted	Frozen unpacked	Frozen packed	Preserved	Salt, Dried smoked
Modern distribution						
Hyper/Supermarket	53.1	40.3	27.8	76.4	84.4	39.0
Discounts	4.6	0.6	7.2	12.4	9-9	2.4
	57.7	40.9	35.0	88.8	94.3	41.4
TOTAL						
Traditional distribution						
- Food Stores						
- Fish shops	6.6	2.9	31.8	8.6	4.2	12.9
- Specialty shops	26.9	43.2	27.7	0.8	0.1	23.1
- Local Markets	0.3	0.1	0.6	0.4	0.5	2.1
	8.0	12.3	4.5	0.1	0.5	20.0
TOTAL						
	41.8	58.5	64.6	10.9	5.3	58.1
Others						
- Cash & Carry/ & Producer Outlets	0.3	0.3	0.3	0.2	0.4	0.3
- Direct sale	0.2	0.3	0.1	0.1	0.0	0.2
TOTAL	0.5	0.6	0.4	0.3	0.4	0.5
GRAND TOTAL	100.0	100.0	100.0	100.0	100.0	100.0
Source: Estimates based on ISMEA preliminary data						

Table: Fish Products Sales Channels, 2001 - Volume as a % and Change as a % (01/00)

Products	Modern Distribution.		Traditional Distribution		Others	
	Volume	Change	Volume	Change	Volume	Change
	%	01/00	%	01/00	%	01/00
Fresh and Defrosted						
-Natural						
Marine Fish	19.6	4.8	42.4	-5.3	33.3	13.6
Freshwater fish	6.7	7.7	6.0	-7.2	20.6	77.2
Mollusks	5.7	13.2	22.7	-3.3	11.6	8.5
Crustaceans	2.7	12.5	4.0	1.0	1.8	216.7
Total Natural	34.7	7.2	75.1	-2.7	67.3	28.8
-Processed						
Breaded	0.8	1.5	0.6	-23.9	0.1	-71.4
Other preparation	1.6	8.4	0.4	-21.1	0.3	-46.2
Total Processed	2.4	6.1	1.0	-22.7	0.4	-60.0
Total Fresh /Defrosted & Processed	37.1	7.1	76.1	-3.0	67.7	27.2
Frozen, frozen not packaged						
-Natural						
-Prepared	4.4	21.1	11.6	-11.1	7.8	-41.9
Total	0.6	25.9	1.4	6.0	0.6	44.4
	5.0	21.6	13.0	-9.5	8.4	-39.7
Frozen Fish, packaged						
-Natural						
-Prepared	14.1	2.6	2.0	-1.4	3.2	-1.5
Total Frozen Packaged	9.2	15.3	1.6	1.3	1.5	-18.4
	23.3	7.4	3.6	-0.3	4.7	7.6
Fish Preserved						
	29.9	4.4	2.6	-9.2	15.2	22.1
Dried, Salted, Smoked						
	4.7	-9.7	4.7	-4.4	4.0	-12.6
Total Fish						
	100.0	6.3	100.0	-4.0	100.0	11.2
Source: Ismea-Nielsen						

CONSUMPTION

Italians prefer to have their seafood outside the home. Only 36 percent of their 23 Kg. per capita is consumed domestically, the rest is consumed in restaurants and from catering services. Per capita consumption didn't improve, contrary to expectations last year, due to an increase in fish prices at the consumer level and a negative media campaign of farm-reared products which emphasized levels of dioxin in feed and fish.

Fresh fish is still preferred to frozen - either natural or processed, although the trend is slowly changing. The expansion of well supplied and equipped supermarkets and frozen food centers, will improve the distribution and consumption of frozen products. Italian consumers demand top-quality seafood products; product presentation and packaging play an important role. There is a long tradition of seafood consumption and Italians are very selective when it comes to seafood. Although seafood consumption and imports are linked to the general economic climate in the country a recent survey indicates that Italian consumers are indeed willing to pay the price for products perceived as being of good quality healthy.

Italian preferences are notable in the following categories: salted fish, smoked salmon, and several varieties in the squid/octopus family (cephalopods). Italy is the third European consumer of salt fish (salted cod fish, dried salted, wet salted fillets), and the first of dried un-salted cod.
Italy is also the second European importer of smoked salmon, mainly from Denmark, but France, the U.K., and Germany are also well represented in the market. Scottish and Irish smoked salmon have a superior image. Fresh salmon is imported for processing in Italian smokehouses, as well as Alaska frozen wild salmon for the gourmet market. Competition in supermarkets outlets have forced down costs and most of the imported products are now produced with the salt injection method, while Italian smokehouses generally use traditional methods and they position the products in the superior categories. Cephalopods are for the most part consumed as hors d'oeuvre. Domestic processors produce prepared or semi-prepared dishes that are sold directly to the catering trade but also as frozen value added products distributed through retailers. Only a small part of the domestic catch is consumed fresh in top restaurants or on the coast close to fishing ports.

There is also a great demand for bivalves, especially mussels and clams, while there has been a significant increase in imports of shrimps, prawn and lobsters. Traditionally Italians have preferred head-on product, but in recent years headless products as well as cooked and peeled shrimp have gained acceptance because of added convenience to consumers.

Regarding fresh aquaculture products, Italians prefer sea bream and bass. As for wild fresh fish, mullet, grouper, dentex and monkfish are much in demand. Aquaculture products are mostly sold fresh and whole, but some products, such as trout, are also sold filleted or smoked in order to add value to the product.

Italians are great consumer of swordfish and various types of shark. Shark is prepared in several ways; most popular is part of the fish soup but it is also eaten fried or grilled, especially when it is available as fresh product.

Table: Italian Household Consumption of Seafood, CY 2000 and CY2001

	Quantity (MT) CY 2000	Quantity (MT) CY 2001	Value (000 USD) CY2001
Fresh and Defrosted:			
Marine Fish	133,639	131,166	962,286
Freshwater fish	31444	30,183	197,825
Mollusks	69,528	67,615	314,406
Crustaceans	11,997	12,161	134,694
Processed, Breaded	2,533	2,737	40,437
Processed, other	2,733	3,203	45,459
Total Fresh & Defrosted	251,874	247,065	1,695,107
Frozen/ Not Prepackaged:			
Natural	35,534	34,330	198,305
Prepared	4,584	5,428	26,121
Total Frozen/not prepackaged	40,118	39,758	224,426
Frozen, Packaged:			
Natural	35,965	34,119	296,013
Prepared	25,219	24,014	197,943
Total Frozen, Packaged	61,184	58,133	493,956
Canned Fish:			
Canned (purchased)	84,193	85,687	594,150
Home preserved	2,512	2,540	59,456
Total Canned Fish	86,705	88,227	653,606
Cured, Dried, Smoked:			
Smoked salmon	1,374	1,375	26,268
Other cured, dried and smoked	15,312	16,697	164,378
Total Cured, Dried, Smoked	16,686	18,072	190,646
GRAND TOTAL	456,567	451,255	3,257,741
Exchange Rate 2001 1 $ = 1.12 i			
Source: Ismea- Nielsen, AgOffice			

Table: Italian Household purchase of Fresh Seafood - Marine Fish , 2001

Products	Quantity MT	Value (000 USD)	Average Price US $ / Kg. (2001)
Anchovy	18,145	80,541	4.44
Gilthead Bream	17,013	116,820	6.87
Sea bass	9,741	76,243	7.83
Cod	9,626	81,499	8.47
Pilchard	7,374	19,856	2.69
Sole	6,494	83,479	12.85
Mackerel	5,757	27,815	4.83
Swordfish	5,729	84,539	14.76
Mullet	4,902	36,634	7.47
Grouper	3,280	33,481	10.21
Grey Mullet	2,441	10,755	4.41
Smooth	2,022	19,614	9.70
Hake	1,513	13,508	8.93
Monk Tail	1,278	15,964	12.49
Dentex	1,014	10,698	10.55
Mixed Fish	3,517	26,794	7.62
Fried Mixed Fish	6,324	42,651	6.74
Other Seafood	24,996	181,395	7.26
Total	131,166	962,286	7.34
Exchange Rate 2001 1 $ = 1.12 i			
Source, AC Nielsen, Ismea			

Table: Italian Household purchase of Fresh Water Fish 2001

Products	Quantity MT	Value (000 USD)	Average Price U.S. $ / Kg. (2001)
Salmon Trout	11,200	65,135	5.82
Trout	6,229	26,510	4.26
Salmon	6,709	49,142	7.32
Perch	3,940	38,073	9.66
Eels	1,569	15,205	9.69
Other fresh water fish	536	3,760	7.01
Total	30,183	197,825	6.55
Exchange Rate 2001 1 $ = 1.12 i			
Source: AC Nielsen, Ismea			

Table: Italian Household purchase of Fresh Mollusks, 2001

Products	Quantity MT	Value (000 USD)	Average Price US $ / Kg. (2001)
Mussels	25,964	46,140	1.78
Clams	10,911	62,245	5.70
Octopus	10,388	66,914	6.44
Squid	8,953	60,528	6.76
Cuttlefish	8,004	55,762	6.97
Oysters	614	3,151	5.13
Scallops	249	2,837	11.39
Other bivalves	1,592	8,976	5.64
Other Cephalopods	940	7,853	8.35
Total	67,615	314,406	4.65
Exchange Rate 2001 1 $ = 1.12 i			
Source: AC Nielsen, Ismea			

Table: Italian Household Purchase of Fresh Crustaceans, 2001

Products	Quantity MT	Value (000 USD)	Average Price U.S $ / Kg. (2001)
Prawns	4,827	61,951	12.83
Shrimps	3,214	31,918	9.93
Norway Lobsters	1,391	17,102	12.29
Squill	1,235	8,125	6.58
Crab	213	1,477	6.93
Lobster	283	5,068	17.91
Spiny Crab	60	422	7.03
Spiny Lobster	153	3,432	22.43
Other crustaceans	785	5,199	6.62
Total	12,161	134,694	11.08
Exchange Rate 2001 1 $ = 1.12 i			
Source: AC Nielsen, Ismea			

Italian household consumption in 2001 decreased by 1.2 percent in volume but increased by 3.2 percent in euro value due to the upturn of fish prices at consumers' level. Increases were above the annual inflation rate (+2.7%); they reached a peak of +7.8 percent between February and April due to the BSE crisis and +5.5 percent between September and October.

The Italian hotel, restaurants and institution are (HRI) catering sector plays an important role in food consumption. Restaurants are the primary location for seafood consumption.

Caterers engaged in the institutional sector are increasingly becoming interested in fish products. The most requested commodities are fish fillets which are frequently served as the main course while surimi and cephalopods are served as appetizers.

TRADE

Trade Trends

Italy is an important net importing country, whose 2001 imports of fish and fish products rose both in quantity (7.5%) and value (11.5%). The trend is for a general expansion of net imports in order to satisfy demand for fish and fishery products and compensate for the reduction of the local catch.

The EU member states continue to be the favored source of Italian imports due to the improved coordination and harmonization of the regulations for quality control on imported fishery products. Spain continues to be the number one supplier of seafood to Italy, with 21 percent of volume in 2001 followed by France, Netherlands, Denmark and Greece.

US product is often included in the data on imports from EU member countries. To avoid strict and unnecessary inspection, importers bring US product into other EU-member countries where inspection and import requirements are not as rigid as in Italy. These products are then brought into Italy with no additional inspection.

Italy's imports from third countries slightly increased both in volume and in value (11 and 14 percent respectively) compared to CY2000, mainly due to price competition. Major third country suppliers in 2001 were: Argentina, Morocco China and South Africa.

Table: Average price for Imported Products, CY 2000 and 2001

	2000	2001
Average price paid for EU fish products	4.04 Euro/Kg	4.23 Euro/Kg
Average price for Third Countries' fish products	3.76 Euro/Kg	3.89 Euro/Kg

Source ISTAT

Table: Italian Fish Trade, 2001

	M.T.	% Change 01/00	000 Euro	% Change 01/00	000 US $
Import	768,937	7.5	2,990,853	11	2,670,832
Export	132,348	-4.9	431,188	6.5	385,051
Trade Balance	-636,589		-2,559,665		-2,285,781
Average Price US $/kilo: Import 3.47 - Export 2.91					
Note: Total Import and export figures does not include fish meal, fish oil and fats, or fish products not intended for human consumption. Source: ISTAT					

Table: Italian Fish Trade, 2001 by Category

Description	Import Quantity	Value	Export Quantity	Value
	M.T.	000 USD	M.T.	000 USD
Live fresh fish	115,535	525,798	44,950	114,347
Frozen fish	170,368	431,140	16,538	32,830
Preserved Fish	171,934	669,812	27,363	97,784
Crustaceans and Mollusks	308,624	1,033,448	42,055	138,553
Others	2,462	10,637	1,427	1,536
Total	768,923	2,670,835	132,333	385,050
Exchange Rate 2001 1 $ = 1.12 i				
Source: ISMEA-ISTAT				

Table: Italian Fish Trade, 2001 by Countries

	Total Imports		Total Exports	
	M.T.	000USD	M.T.	000USD
Austria	117	271	4,068	11,620
Belgium	4,077	18,199	2,956	9,505
Denmark	46,383	282,194	352	1,134
Finland	3	17	25	171
France	57,990	188,655	20,664	45,349
Germany	31,459	95,384	16,816	52,533
Greece	37,686	105,628	12,136	40,755
Ireland	5,670	29,303	104	140
Luxemburg	74	622	59	210
Netherlands	54,624	246,798	3,608	10,931
Portugal	6,976	32,602	192	678
U.K.	17,611	89,795	1,377	5,173
Spain	162,759	483,823	47,679	128,162
Sweden	10,377	71,161	77	291
TOTAL EU	435,806	1,644,452	110,113	306,652
Argentina	26,583	107,430	0	0
Brazil	1,258	7,359	0	0
China	14,976	38,954	0	0
Hungary	0	0	355	1,222
Morocco	26,181	87,042	0	0
New Zealand	5,500	11,367	0	0
Peru	13,025	20,243	0	0
Romania	0	0	351	565
South Africa	13,359	49,083	0	0
South Korea	6,096	14,217	0	0
Switzerland	0	0	3,100	14,785
Taiwan	10,620	16,604	0	0
Tunisia	8,973	40,389	1,538	2,119
Uruguay	5,487	18,464	0	0
U.S.A.	9,741	45,779	627	3,495
Others (Africa)	61,039	179,588	670	1,915
Others (America)	43,231	160,119	384	2,107
Others (Asia)	64,168	169,609	1,719	12,257
Other Eastern countries	9,150	20,068	8,087	17,961
Others Europe (not EU)	9,587	26,273	4,075	15,966
Others not specified	4,143	13,795	1,314	6,006

TOTAL THIRD COUNTRIES	333,117	1,026,383	22,220	78,398
GRAND TOTAL	768,923	2,670,835	132,333	385,050

Table: Italian Fish Trade with the U.S. , 2001 by Category

Description	Import Quantity	Value	Export Quantity	Value
	M.T.	000 USD	M.T.	000 USD
Live fresh fish	561	1,282	46	598
Frozen fish	2,964	5,837	0	0
Preserved Fish	775	2,548	505	2,638
Crustaceans and Mollusks	5,338	33,368	76	259
Others	103	2,744	0	0
Total	9,741	45,779	627	3,495
Exchange Rate 2001 1 $ = 1.12 i				
Source: ISMEA-ISTAT				

In 2001, Italy imported almost $46 million in U.S. fish and seafood products, the bulk of which was in lobster (2,414 MT) and squid (2,874 MT) (Source ISTAT). Surimi imports from the US almost doubled in 2001 reaching 724 MT. The Unites States was the leading supplier of frozen surimi. The United States leading competitors on the Italian market for surimi base are Canada and Chile. Italy's leading suppliers for prepared surimi products are South Korea and China.
Italy's total imports of prepared surimi reached 7,714 MT and 1,271 MT for frozen surimi. Italy's surimi consumption has increased considerably during recent years.

Potential Growth Markets for Seafood Products

In Italy's evolving seafood market, almost any fresh, white fleshed edible fish variety is a prime candidate for dinner.

Continued growth of the following products is expected:

S Raw material for Italian canning industry, mainly tuna.

S All frozen fillets such as hake, cod and plaice for the retail sector.

S Frozen fillets of dab (limanda limanda) for the catering sector.

S Fresh and frozen turbot which is highly valued and not always available in restaurant. Frozen shrimps for the HRI and value added processors sectors. The product is losing its exclusivity and is increasingly seen by the consumer as a daily food. Peeled and processed product will take a bigger share of domestic demand. The forecast for imports of Norway lobsters and lobsters from the US is good.

S Crabs. The market for crab is still relatively modest. Live crabs could improve their presence on the market. Prepared/conserved products are being imported. The quality needs to be upgraded.

S King crab legs (IQF) of king crab. Promotion at the HRI level could increase their presence in Italy since the product is not well known in Italy.

S Surimi both frozen and processed.

S Well rinsed (no sand, no grit) bivalves well sorted by size, frozen and in good condition.

S Value added products such as lobster patè, soup and sauce are still considered luxury specialties and are right now consumed in modest quantities mainly in restaurants.

S Cephalopods are expected to continue growing: squid, cuttlefish, octopus and flying squid. Increases in use of frozen seafood and value-added products are factors that will contribute positively to this growth.

S Frozen shark: they are imported in dressed form and sold as frozen steaks or fillets.

S Shark cartilage capsules. The importation of powdered shark cartilage from third countries is regulated by the EU Directive 91/493 as a fishery product. If the product is in the form of pills, capsules, oil etc., the product falls under the EU Directive 89/398 for Medical/Pharmaceutical sector.

General Factors Affecting U.S. Trade

The low catches in Italian and international waters and improved demand for fish products both at the consumer and processor levels will continue to stimulate Italian imports of fishery products. Countries such the U.S. have provisional clearance to export to EU countries, however the EU reserves the right to carry out inspection visits to verify information.

U.S. processors packers, or fish and fishery product establishment must be approved by the Food and Drug Administration to export into the EU countries. This allows the issuance of a health certificate which is mandatory in Italy. A broker cannot be on the approved list. The name of the Country of Origin and the number of the FDA approved company MUST appear on the packaging.

U.S. exporters should be aware that Italian authorities impose strict quality control product specification, labeling, and certification requirements for fish products. The regulations are very complex, and exporters are strongly advised to seek information and practical advise on a case-by-case basis from experienced agents and importers.

As of January 1, 2002 the European Commission has adopted the Regulation 2065/2001/EC requiring more detailed information for consumers regarding fishery and aquaculture products. From that date all fisheries and aquaculture products on sale at retailers will have to be appropriately labeled with the following information:

- The commercial name of the species (the Latin name is not compulsory except if the customer requires it). Each member state has established a list of commercial names applicable.

- Production method (wild catch or aquaculture). The proper language to use is: "caught in...", "caught in fresh water", "farmed" or "cultivated".

- The catch area. Product caught at sea has to show the area from FAO list (Annex). Products caught in fresh water will require a reference to the Member State or third country of origin of these products. As for farmed products, the reference will be to the Member State or third country in which the product undergoes the final development stage.

This provision is intended to inform consumers about the product’s traceability at all stages of the marketing process. Products need to be labeled or accompanied by a document indicating the above information as well as the scientific (Latin) name of the products.

POLICY

Italian inshore fisheries will benefit from a grants program running until 2006. On June 18 the Commission announced that aid schemes to 12 Italian regions for various fisheries projects are compatible with the rules governing state aid. Italy's financial contribution will amount to euros 55.24 million, while the Financial Instrument for Fisheries Guidance (FIFG) will provide euros 39.88 million. Under EU co-financing rules, Italy must put up seed funding before grants can be released from the EU. Grants will be made available for measures to protect fish stocks, aquaculture, upgrading of port facilities, processing and marketing of fisheries products. Measures in favor of the small-scale fleet and various operations undertaken by the industry to improve the situation of the sector are also to benefit.

LOBSTERS PSD TABLE

PSD Table						
Country	Italy					
Commodity	Lobster				(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Beginning Stocks	50	50	50	50	50	50
Total Production	240	240	240	230	0	230
Intra-EC Imports	1000	942	950	960	0	1000
Other Imports	3800	3973	3950	4000	0	4000
TOTAL Imports	4800	4915	4900	4960	0	5000
TOTAL SUPPLY	5090	5205	5190	5240	50	5280
Intra-EC Exports	50	51	60	50	0	50
Other Exports	30	17	40	30	0	30
TOTAL Exports	80	68	100	80	0	80
Domestic Consumption	4860	4987	4940	5010	0	5050
Other Use/Loss	100	100	100	100	0	100
TOTAL Utilization	4960	5087	5040	5110	0	5150
Ending Stocks	50	50	50	50	0	50
TOTAL DISTRIBUTION	5090	5205	5190	5240	0	5280

Production

The domestic catch of spiny lobster (Palinurus) is reported to be modest. The majority of the Italian catch is wild. The quality of the local catch is excellent but the price, due to its shortage, is extremely high.

Consumption

Lobster consumption slightly increased in CY 2001. Most lobster imported from the U.S. is live and it is very popular in the catering sector due to its reasonable price. Lobsters are often served fried, split-in-two, in which case the meat from the second half can be used for a pasta first course. The high priced spiny lobster is still considered a luxury product with peak consumption taking place in upper-class restaurants on special occasions. When locally available, fresh spiny lobsters are in particularly high demand.

Trade

Italy is a net importer of live, fresh and frozen lobsters and will continue to be so considering the modest local production and the growing consumer demand. Italian lobster importers have long- established trade ties with the U.S. and Canada. In 2001 imports of lobsters increased by 2 percent. The U.S. and Canada are by far the most important suppliers of live lobsters to the Italian market although during 2001 the strength of the U.S. dollar has slightly reduced export quantities.

Total Italian imports of lobster include the species Homarus (Maine lobster, or astice in Italian) and the spiny lobster/rock lobster (aragosta in Italian.) For 2001, imports are reported at 4,915 MT for a total of 64 million US$.

Customs duties for lobsters are 8 percent ad valorem for live products and 6 percent for frozen lobster. Frozen spiny lobsters' custom duties amount to 12.5 percent . VAT is 20% on all products. Italy also exports some of the local lobster catch.

ITALIAN EXPORTS OF LOBSTERS

Export Trade Matrix			
Country	Italy		
Commodity	Lobster		
Time period	CY	Units:	Tons
Exports for:	2000		2001
U.S.	7	U.S.	
Others		Others	
Greece	27	Greece	30
France	23	Slovenia	9
Malta	18	France	6
Slovenia	10	Germany	6
Germany	6	Switzerland	4
Switzerland	4	Portugal	4
Croatia	1	Spain	3
Romania	1	Malta	3
Bosnia	1	Austria	2
Hungary	1	Croatia	1
Total for Others	92		68
Others not Listed	3		2
Grand Total	102		70

ITALIAN IMPORTS OF LOBSTERS

Import Trade Matrix			
Country	Italy		
Commodity	Lobster		
Time period	CY	Units:	Tons
Imports for:	2000		2001
U.S.	2479	U.S.	2414
Others		Others	
Canada	952	Canada	1004
Spain	638	Spain	690
France	125	Ghana	149
Ghana	111	France	124
South Africa	97	Ecuador	103
Cuba	72	South Africa	78
Peru	55	Cuba	60
Denmark	54	Denmark	57
U.K.	53	Australia	33
Belgium	27	India	32
Total for Others	2184		2330
Others not Listed			171
Grand Total	4663		4915

SQUID PSD TABLE

PSD Table						
Country	Italy					
Commodity	Squid/Cuttlefish				(MT)	
	Revised	2001	Preliminary	2002	Forecast	2003
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Beginning Stocks	7500	7500	7500	8000	7500	7500
Total Production	24000	23900	23900	23900	0	23900
Intra-EC Imports	42000	45928	41500	44000	0	45000
Other Imports	61000	74937	71000	75000	0	75500
TOTAL Imports	103000	120865	112500	119000	0	120500
TOTAL SUPPLY	134500	152265	143900	150900	7500	151900
Intra-EC Exports	2900	3344	2700	3000	0	3000
Other Exports	1200	1121	1100	1100	0	1100
TOTAL Exports	4100	4465	3800	4100	0	4100
Domestic Consumption	121650	138550	131350	138050	0	139050
Other Use/Loss	1250	1250	1250	1250	0	1250
TOTAL Utilization	122900	139800	132600	139300	0	140300
Ending Stocks	7500	8000	7500	7500	0	7500
TOTAL DISTRIBUTION	134500	152265	143900	150900	0	151900

Production

The Italian production of cephalopods is equally distributed between squid, cuttlefish and octopus and depends largely on the fishing operations carried out in the Atlantic and in the Mediterranean Sea.

Three species of Italian squid are commonly fished: the "calamaro" or common squid (Loligo Vulgaris), the "totano" or European flying squid (Todarodes sagittatus) and the "totano volatore" or Mediterranean flying squid (Illex coindetti). Commercially, the latter two are generally lumped together, and the only distinction made is between the calamaro and totano.

Consumption

In 2001, Italian squid consumption is reported to be increasing. It appears that this trend is continuing as the demand for frozen, convenient and ready to cook products is growing both at the retail and catering level. Squid and cuttlefish have a high level of consumption throughout the country.

Boston squid used to be the preferred squid in Italy, particularly the frozen-at-sea product, as it is generally considered to be of superior quality. The California squid is generally considered of less value. Both US species may be processed or sold as imported and in most cases the country of origin is not well advertised at the retail and/or consumers levels. Importers are looking for smaller units or retail packaging for the USA origin squid.

Squid rings of Illex imported from Spain are well accepted by the market. Mixed squid rings and tentacles are also used by caterers. The rings and tentacles are usually separated in blocks. Consumption of squid increases during summer months in connection with the Italian vacation period and higher tourist season. Outlook for squid consumption remains good.

Trade

The Italian supply of squids is very dependent on imported products which increased by 8.4 percent during CY 2001. Exports from the U.S. didn’t follow this trend, in fact during CY 2001 it registered a sharp decrease (-66%) compared to the previous year. Spain and Thailand continue to be the leader in exports to the Italian market. Exports from Peru more than doubled, which had a strong impact on US exports. Peruvian squids low origin cost (about 50 percent less than the Boston squid) and duty free status (US exports are assayed six percent tariff), made the Peruvian product very attractive for the Italian market. Other factors explaining the US drop were the unfavorable exchange rate and high stocks in some European countries during 2001. Reportedly Peruvian exports to Italy will somewhat decrease during 2002.

Total Italian imports of squid and cuttlefish for 2001 are reported at 120,865 MT for a total of 271 Million USD.

TVA on frozen squid is 10 percent.
ITALIAN EXPORTS OF SQUID AND CUTTLEFISH

Export Trade Matrix			
Country	Italy		
Commodity	Squid/Cuttlefish		
Time period	CY	Units:	Metric Tons
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Spain	999	Spain	1627
Germany	819	Germany	1019
Greece	446	Romania	289
Croatia	242	Austria	207
Romania	210	Greece	206
Austria	198	Croatia	172
Switzerland	162	France	170
Slovenia	161	Slovenia	165
France	117	Switzerland	138
Portugal	85	Tunisia	96
Total for Others	3439	Total for Others	4089
Others not Listed	291	Others not Listed	376
Grand Total	3730	Grand Total	4465

ITALIAN IMPORT OF SQUID AND CUTTLEFISH

Import Trade Matrix			
Country	Italy		
Commodity	Squid/Cuttlefish		
Time period	CY	Units:	Metric Tons
Imports for:	2000		2001
U.S.	8394	U.S.	2874
Others		Others	
Spain	27397	Spain	33832
Thailand	18586	Thailand	20852
France	9229	India	8859
India	7120	France	8168
Morocco	6749	Peru	8007
South Africa	4493	China	3796
Vietnam	3976	South Africa	3748
Peru	3827	Vietnam	3704
Mauritania	3257	Mauritania	3291
Senegal	3075	Senegal	3242
Total for Others	87709	Total for Others	97499
Others not Listed	15359	Others not Listed	20492
Grand Total	111462	Grand Total	120865

FISH STRATEGIC INDICATOR TABLE

FISH STRATEGIC INDICATOR TABLE		Previous	Current	Next	5 Year
		Year	Year	Year	Projections/
U.S. Competitive Position	Measurement *	Situation	Situation	Expectations	Expectations
U.S. Access Relative to Rest of World- Non-Tariff Measures (NTM)	Worse, equal, or better	equal	equal	equal	equal
U.S. Access Relative to Rest of World - Tariffs	Higher, equal, or lower	see next line	see next line	see next line	see next line
EU imports have no tariffs. US products equal to other third county products except for developing countries					
Presence of Marketing Programs (domestic and 3rd country) versus U.S. programs	More aggressive, about the same, or less aggressive	more aggressive North European countries	more aggressive North European countries	more aggressive North European countries	more aggressive North European countries
U.S. Prices Relative to Domestic and 3rd Country Prices	Higher, equal, or lower	equal-lower*	equal-lower*	equal-lower*	equal-lower*
Prices from some third countries i.e. Peru were reportedly 50 percent lower					
U.S. Market Share (3 Year Average)	Percent (value)	2	2	2	4
		Previous	Current	Next	5 Year
		Year	Year	Year	Projections/
Market Attractiveness	Measurement *	Situation	Situation	Expectations	Expectations
Per Capita Consumption of All Fishery Products	Kg per person	23	23	24	24
Per Capita Consumption of animal proteins (excluding fishery products)	Kg per person	68	66	70	72
Percent of population with refrigerators	Percent	99.9	99.9	99.9	99.9
Percent of fishery product sales at supermarkets	Percent	26	26	26	27
Note: Percentages include canned, cured and smoked products					
		Previous Year	Current Year	Next Year	Five Year Projections
		Situation	Situation	Expectations	Expectations
Percent of total food sales at supermarkets	Percent	69.8	71	72	72

FISH STRATEGIC INDICATOR TABLE		Previous	Current	Next	5 Year
Percent of animal protein sales at supermarkets (excluding fishery products)	Percent	75	78	78	80
Percent of fishery sales at HRI establishments	Percent	27	27	28	28
Percent of fishery sales at open markets	Percent	8	8	8	7