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Required Report - public distribution

Date: 12/27/2013

GAIN Report Number: IT1391

Italy

Food Service - Hotel Restaurant Institutional

2013 Italy Food Service - Hotel Restaurant Institutional

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Report Highlights:
This report gives an overview of the Italian foodservice industry and its various sectors. It also outlines current market trends, and identifies best product prospects.

Post:
Rome

Author Defined:
Macro Economic Situation & Key Demographic Trends
Italy has a diversified industrial economy, divided into a developed industrial north, dominated by private companies, and a less-developed agricultural south, afflicted with high unemployment. The Italian economy is driven in large part by the manufacture of high-quality consumer goods produced by small and medium-sized enterprises, many of them family owned.

The euro-zone crisis, along with Italian austerity measures, has contributed to soft consumer demand and a slow domestic recovery. Italy is the third-largest economy in the euro-zone, but exceptionally high public debt burdens and structural impediments to growth have rendered it vulnerable to scrutiny by financial markets. Italy's GDP is estimated to be $1.863 trillion or a per capita GDP of $30,600. With much land unsuited for farming, Italy is a net food importer. Unemployment is a regional issue in Italy -- low in the north, high in the south. In 2012, the unemployment rate was 10.6%. Italy's closest trade ties are with other European Union countries (60% of its total trade). Italy's largest EU trade partners, in order of market share, are: Germany, France, and the United Kingdom. Italy has a population of roughly 60 million, and Italian is the official language.

The Italian Hotel and Food Service Industry
Every year more than 95 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. Many small establishments dominate Italy, including: bed and breakfasts, youth hostels, camping facilities, resorts and rural tourism. According to the Italian Hotel Association, Federalberghi, more than 250 million people stayed in an Italian hotel in 2012.

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

Changing Italian lifestyles, with more workers now forced to spend their lunch hours outside of the home due to either longer commuting times or shorter lunch breaks, have given a boost to the food service industry. Italy is slowly moving towards trends and lifestyles seen in other European countries, and it is forecast that an increasing number of consumers will eat out during their lunch breaks and possibly also for their evening meals because of their jobs, long working hours, and business meetings. Although lunch breaks are likely to become shorter, it remains unlikely that most Italians will eat lunch at their desks. Italians still prefer to leave the office for a quick bite. Most hotels in Italy operate on the continental plan, which includes breakfast in the room rate. Lunch and dinner are seldom served due to the lack of demand from the small number of guestrooms. The breakfast room is closed for the rest of the day. There is, however, usually a stand-up bar off the lobby, which serves espresso, cappuccino, and alcoholic beverages throughout the day.

Restaurants, Bars and Take-Away

The majority of Italian eating establishments are located in the North (50%), followed by the South (28%) and then the Center (22%). Cafés/bars continue to be the largest segment of the consumer foodservice sector, and coffee is the leading product consumed outside of the home, followed by soft drinks and alcoholic beverages. Fast food is becoming one of the most dynamic sectors in consumer foodservice along with street stalls/kiosks. Home delivery/takeaway is still a relatively underdeveloped segment in Italy compared with other European countries and is mostly composed of pizza outlets. Self-service cafeterias remain stable, most of them belonging to chain outlets strategically located in shopping malls, airports, highway convenience stores, and city centers. Ethnic eateries are booming in Italy and foreigners have carved out a big chunk of new Italian restaurants. There are an estimated 4,500 restaurants serving foreign ethnic food, of which 40% are owned by non-Italians. The Italian Institutional sector in Italy is valued at about €8 billion and serves more than 5.5 million meals a day. Presently, the main Institutional Catering companies operating in Italy are Ristochef, Gama, Gemeaz, Onama, La Cascina and Sodexho.

Helpful Advice

The best initial step that a U.S. company interested in exporting to Italy and the EU can take is to find a reputable food importer, agent or wholesaler who already operates in the Italian market, knows how to facilitate product entry and has an established distribution to the HRI sector. Italian importers are usually small to medium-sized companies, rather than the large, market-dominating entities found in northern Europe. Consequently, these companies import on a smaller scale and usually in a broader range than their much larger counterparts do.

Italians tend to be conservative and traditional in their eating. Food service companies usually select their products directly from the importers and distributors. Therefore, U.S. exporters need to work closely with the industry, focusing on the importers and distributors who can best promote U.S. products to the Italian HRI sector. These groups often have up-to-date knowledge of the most recent laws and regulations, and know how to communicate and work closely with the Italian Customs Officials. American exporters who can assist in consolidating shipments from other U.S. sources or who have a wide range of products for export have the greatest possibility of success in the Italian market. Single item exporters have a more limited chance for success in the Italian market at this time.

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. In Italy, there are over 1000 fish wholesalers--100 of which are considered importers. Most of the processed food and raw material sourcing decisions are made directly by the restaurant chef and/or hotel Food Purchasing Director. While there are Category Associations for the HRI sector, every establishment operates independently when it comes to sourcing decisions. (See listing of Italian HRI sector Associations).

Studies have shown that sourcing behavior and purchasing decisions made by food service establishments are mainly based on the perceived "quality of the food," followed by "price." Italians tend to purchase "the same products to be on the safe side" and most decisions are made by the establishment owner or the chef. 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. Health & wellness will continue to be one of the main drivers of trends when it comes to creating new menus and offerings. Nutritious meals with lower fat content and more vegetables and fruits are expected to be given increasing prominence in menu displays.

Table: Food Consumption Indicators - Historical Data & Forecasts, 2010-2017

	2010	2011	2012	2013f	2014f	2015f	2016f	2017f
Food consumption EURbn	123.41	125.52	124.26	124.63	126.24	127.89	129.65	131.45
Food consumption, EUR, % chg y-o-y	1.57	1.72	-1.00	0.29	1.29	1.31	1.38	1.39
Food consumption, EUR per capita	2,038.07	2,064.93	2,038.30	2,040.16	2,063.58	2,088.27	2,115.44	2,144.00
Food consumption, EUR per capita, % chg y-o-y	1.06	1.32	-1.29	0.09	1.15	1.20	1.30	1.35
Food consumption, US $bn	163.46	174.57	157.81	155.78	151.49	153.46	155.58	157.74
Food consumption US$, % change y-o-y	-3.23	6.80	-9.60	-1.29	-2.76	1.31	1.38	1.39
Food consumption, US$ per capita	2,699.54	2,871.81	2,588.64	2,550.20	2,476.29	2,505.93	2,538.53	2,572.80

f = BMI forecast. Source: BMI, National Institute of Statistics

Advantages and Challenges Facing U.S. Products in Italy

Advantages	Challenges
Food consumption levels in Italy are among the highest in the world. Italians value quality food.	Competition in the Italian food market is fierce and many consumers still prefer traditional Italian products.
Italy is a member of the Euro zone, which eases market entry and transshipping.	U.S. exporters must conform to often-difficult Italian/European standards and regulations.
Consumers are receptive to modern and innovative products, although arguably less so than elsewhere in Europe.	High unemployment has kept consumers price sensitive.

Road Map for Market Entry

With more women in the workforce, and changing working conditions, Italians seem to be eating out more, taking shorter lunch breaks, snacking more and spending much less time in the kitchen preparing a meal. Dine out preferences are shifting from traditional restaurants in favor of less expensive foodservice options like pizzerias, bars, street stalls/kiosks, self-service cafeterias and fast food. This shift towards convenient dining has led Italian importers to seek food products adapted to self-service eateries. Many bars, restaurants and food service companies also are seeking foods that microwave easily. While home use of microwaves is still low, microwave sales are increasing. Families with two working parents rely more and more on microwaves to reheat food and prepare frozen foods. Microwaves are present in most small food shops to reheat baked goods such as pizza or roasted chicken.

The Italian youth market is especially interested in lifestyle foods such as American beer, Tex Mex, sushi, ethnic and salted snacks. American type packaging is perceived as being trendy and consumer friendly. U.S. exports of bulk and packaged dried fruits and nuts have consistently sold well in Italy and do very well in the HRI sector.

Best Product Prospects
American-style fast food chains, buffets, and salad bars are gaining popularity in the Italian market. This move towards more convenient dining has led Italian importers to seek out U.S. food products adapted to self-service eateries. Many bars, restaurants and food service companies also are seeking foods that microwave easily. Italians are consuming increasing quantities of breakfast cereals, organic and snack foods. The Italian youth market is especially interested in lifestyle foods such as American microbrew beer and salted snacks.

American food does well in the Italian market, including in the increasingly popular sushi bars. Italy is the world's fifth largest importer of seafood products, with an estimated annual consumption of almost 26 kilograms of fish and seafood. Last year Italy imported $85,518 million from the United States in seafood products. Opportunities exist in the supply of fish, especially tuna, salmon, crab, surimi, roe, 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.

Bilateral Ag Trade 2012

Major U.S. Exports to Italy: $922 million	**Major U.S Imports from Italy: $3.5 billion**
Tree Nuts: $177 million	Wine: $1,536 million
Wheat: $137 million	Olive Oil: $535 million
Fish products $80 million	Cheese: $291 million
Hides & Skins $65 million	Snack Foods $128 million
Red Meats $64 million	Coffee $70 million
Hardwood Lumber: $55 million	Forest Products $75 million

Exchange Rate: EURO per U.S. Dollar
Average 2012: €0.777 = $1.00

Best Products Prospects

A. U.S. products in the Italian market that have good sales potential:
Wild salmon from Alaska
Lobster
Dried plums
Tree nuts
Wheat
Tex Mex and other ethnic foods
Dried beans and lentils
Processed fruit juice

B. Products not present in significant quantities but which have good sales potential:
Dressings and sauces/condiments
Beer
Snacks
Scallops
Chocolate

Specialty/Microbrew Beer

C. Products not present because they face significant trade barriers:
Hormone Beef
Poultry
Processed food products containing GM ingredients

U.S. Exports of Agricultural & Related Products to "Italy(*)"
FY 2009 - 2012 and Year-to-Date Comparisons
(in millions of dollars+)

Export Market: "Italy(*)"

	Fiscal Years (Oct-Sept)					October - October Comparisons		
Product	2009	2010	2011	2012	2013	2013	2014	%Chg
Bulk Total	131.0	217.0	287.3	185.6	309.2	10.5	13.8	32.0
Wheat	93.0	97.5	196.3*	137.6	185.5	6.8	5.6	-17.4
Corn	0.0	0.0	7.6	0.0	0.4	0.0	0.0	-
Coarse Grains (ex. corn)	0.0	0.0	10.1	0.0	12.5	0.0	0.0	-
Rice	1.0	0.3	0.3	0.8	1.0	0.0	0.0	-
Soybeans	23.0	91.1	1.1	1.1	64.1	0.1	0.0	-75.0
Oilseeds (ex. soybean)	0.0	0.1	0.3	0.0	0.2	0.0	0.0	-
Cotton	5.0	9.9	39.6	11.9	4.5	0.5	1.1	134.8
Pulses	4.0	9.3	22.7*	22.2	22.6	2.2	4.5	109.5
Tobacco	1.0	2.2	0.8	2.9	1.7	0.0	0.7	-
Other Bulk Commodities	6.0	6.6	8.4	9.0	15.5	0.9	1.8	106.9
Intermediate Total	224.0	166.6	265.1	174.7	236.1	24.1	29.9	24.4
Soybean Meal	26.0	10.0	0.4	8.5	91.5	11.2	18.6	65.8
Soybean Oil	0.0	0.1	0.2	0.3	0.0	0.0	0.0	-
Vegetable Oils (ex. soybean)	76.0*	10.0	26.2	12.8	17.2	1.0	1.2	13.5
Animal Fats	0.0	0.0	0.0	0.1	0.0	0.0	0.0	-65.5
Live Animals	1.0	2.6	1.4	1.1	0.4	0.0	0.0	-
Hides & Skins	38.0	67.3	139.6*	65.3	56.4	6.7	5.5	-18.1
Hay	0.0	0.1	0.0	0.0	0.1	0.0	0.0	-
Distillers Grains	0.0	0.0	3.1	0.0	0.0	0.0	0.0	-
Feeds & Fodders NESOI	8.0	3.0	8.9	2.9	2.8	0.4	0.2	-41.6
Planting Seeds	33.0	31.1	36.9	39.7	36.5	2.4	2.1	-13.3
Sugar, Sweeteners, Bev. Bases	1.0	0.4	0.3	0.5	4.6*	0.1	0.3	188.4
Other Intermediate Products	41.0	41.9	48.2*	43.4	26.1	2.2	2.1	-5.3
Consumer Oriented Total	315.0	307.4	346.4	368.1	408.9*	58.8	86.0	46.3
Beef & Beef Products	6.0	23.0	56.1	63.2	65.3*	3.6	4.6	26.0
Pork & Pork Products	2.0	4.9	2.9	0.6	1.1	0.1	0.2	210.2
Poultry Meat & Prods. (ex. eggs)	1.0	1.4	1.1	0.5	1.2	0.0	0.1	265.2
Meat Products NESOI	1.0	0.4	0.8	0.3	0.2	0.0	0.0	-25.7
Eggs & Products	3.0	1.1	1.0	2.8	1.5	0.2	0.3	90.4
Dairy Products	2.0	2.7	1.1	1.1	1.3	0.1	0.1	57.6
Fresh Fruit	0.0	0.4	0.6	0.2	0.1	0.0	0.0	-
Processed Fruit	13.0	20.3	18.2	12.8	14.5	2.0	1.4	-28.8
Fresh Vegetables	1.0	0.4	1.2	0.4	0.1	0.0	0.0	-
Processed Vegetables	72.0*	41.4	22.6	44.0	64.4	3.8	6.4	70.6
Fruit & Vegetable Juices	1.0	1.1	2.1	2.9*	2.0	0.2	0.1	-65.8
Tree Nuts	133.0	125.8	165.2	177.8	183.2	43.9	67.0	52.7
Chocolate & Cocoa Products	0.0	0.2	0.6	0.3	0.1	0.0	0.1	1574.7
Snack Foods NESOI	2.0	3.7	3.5	4.7*	4.1	0.5	0.3	-35.2
Breakfast Cereals	1.0*	0.0	0.2	0.0	0.0	0.0	0.0	-
Condiments & Sauces	2.0	1.5	1.6	2.5*	1.8	0.2	0.4	46.2
Prepared Food	4.0	3.3	4.9	3.9	9.4	0.4	0.7	67.2
Wine & Beer	54.0	66.0*	51.6	39.9	49.5	3.3	3.4	5.5
Non-Alcoholic Bev. (ex. juices)	3.0	4.3	5.5*	3.2	1.7	0.1	0.1	-3.0
Dog & Cat Food	10.0	4.4	4.4	6.7	6.3	0.3	0.6	115.1
Other Consumer Oriented	6.0	1.1	1.0	0.3	0.2	0.0	0.0	-
Agricultural Related Products	248.0	297.4	303.5	223.4	241.7	20.1	23.2	15.6
Distilled Spirits	32.0	31.8	32.1	30.7	25.5	3.3	4.0	22.9
Ethanol (non-bev.)	0.0	0.1	0.0	0.0	0.1	0.0	0.1	-
Forest Products	136.0	175.2	185.8	112.2	140.5	9.1	12.1	32.8
Fish Products	80.0	90.4*	85.5	80.5	75.2	7.7	7.1	-8.4
Agricultural Products	670.0	691.0	898.8	728.4	954.2	93.3	129.7	39.0
Agricultural & Related Products	918.0	988.4	1,202.2	951.8	1,195.5	113.4	153.0	34.9

Prepared By: Global Policy Analysis Division/OGA/FAS/USDA
Source: U.S. Census Bureau Trade Data

* Denote Highest Export Levels Since at Least FY 1970
+Values of $0.05 million or more are rounded to $0.1 million

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U.S. Imports of Agricultural & Related Products from "Italy(*)"
FY 2009 - 2012 and Year-to-Date Comparisons
(in millions of dollars+)

Import Supplier: "Italy(*)"

Product	Fiscal Years (Oct-Sept)					October - October Comparisons		
	2009	2010	2011	2012	2013	2013	2014	%Chg
Bulk Total	71.0	31.7	27.8	26.6	23.0	2.9	1.5	-47.0
Wheat	0.0	0.3	0.3	0.2	0.4*	0.0	0.0	-55.6
Coarse Grains	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Rice	8.0	9.6	13.9*	12.5	11.2	1.0	0.7	-27.1
Tobacco	23.0*	16.1	9.5	6.6	6.3	1.2	0.5	-59.3
Rubber & Allied Products	0.0	0.2	0.2	1.0*	0.2	0.0	0.0	-
Coffee, Unroasted	0.0	0.8	0.5	2.0	1.0	0.2	0.0	-92.2
Cocoa Beans	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Tea, Incl Herb	1.0	2.6	2.5	3.6*	3.2	0.4	0.3	-33.3
Raw Beet & Cane Sugar	0.0	0.0	0.0	0.0	0.1*	0.0	0.0	-
Other Bulk Commodities	38.0	2.0	0.9	0.7	0.6	0.0	0.0	-73.6
Intermediate Total	600.0	588.4	608.7	623.9	667.2	52.1	59.9	15.0
Tropical Oils	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Vegetable Oils	553.0	525.8	542.2	535.0	574.9	45.2	51.9	14.7
Feeds & Fodders	3.0	5.4	2.0	7.7*	7.1	0.8	0.7	-16.7
Live Animals	0.0	0.1	0.3	0.5	0.1	0.0	0.0	-
Hides & Skins	0.0	0.2	0.4	0.3	0.4	0.0	0.0	1144.5
Planting Seeds	6.0	5.0	5.5	9.0	10.0*	0.7	0.5	-24.8
Sugars, Sweeteners, Bev Bases	1.0	0.6	2.6	1.3	3.5	0.1	0.2	88.4
Essential Oils	10.0	19.0	20.0*	18.6	17.3	0.8	1.7	111.9
Cocoa Paste & Cocoa Butter	3.0	4.3	5.4	5.9	6.4*	0.5	0.5	-0.1
Other Intermediate Products	23.0	28.0	30.4	45.5	47.6*	3.9	4.3	10.4
Consumer-Oriented	2,169.0	2,313.5	2,662.2	2,796.2	2,972.7*	259.5	330.1	27.2
Snack Foods	114.0	110.9	127.9	128.8	142.3*	19.9	24.0	20.3
Red Meats, FR/CH/FR	0.0*	0.0	0.0	0.0	0.1	0.0	0.0	-
Red Meats, Prep/Pres	53.0	59.4	69.3	81.5	93.9*	7.8	12.0	54.2
Cheese	256.0	274.5	313.6	292.0	297.2	22.8	42.8	87.3
Other Dairy Products	25.0	25.5	32.2	47.0*	36.4	2.9	5.3	81.0
Other Fresh Fruit	22.0	20.8	17.2	22.7	33.1*	1.8	3.8	113.4
Fresh Vegetables	1.0	0.7	1.2	7.1	10.1*	1.4	1.7	22.2
Processed Fruit & Vegetables	40.0	47.4	54.0	65.2*	63.0	5.3	6.6	24.9
Fruit & Vegetable Juices	8.0	9.0	20.8	19.0	29.1	1.3	2.7	105.9
Tree Nuts	9.0	9.4	10.3	17.2	16.5	1.0	1.7	68.3
Wine and Beer	1,194.0	1,295.3	1,507.7	1,536.3	1,637.8*	142.8	165.5	15.9
Nursery Products	6.0	4.6	5.0	5.7	5.5	0.5	0.5	-10.8
Roasted & Instant Coffee	40.0	45.7	53.3	69.5*	69.2	4.9	6.6	34.0
Spices	3.0	2.9	2.4	2.2	2.2	0.2	0.1	-24.0
Other Consumer Oriented	399.0	407.4	447.1	502.1	535.9*	46.8	56.7	21.2
Forest Products	81.0	70.4	69.6	74.6	83.8	5.3	8.5	61.6
Logs and Chips	0.0	0.1	0.0	0.1	0.0	0.0	0.0	-
Hardwood Lumber	1.0	0.9	1.9	2.2	2.4	0.1	0.3	146.6
Softwood and Treated Lumber	0.0	0.1	0.1	0.2	0.0	0.0	0.0	-
Panel Products (Incl Plywood)	27.0	21.4	27.7	29.7	31.5	2.2	2.2	-0.4
Other Value-Added Wood Prod.	52.0	47.8	39.9	42.4	49.4	2.9	6.0	104.2
Seafood Products	8.0	9.4	11.0	12.2*	10.6	1.1	0.8	-29.7
Shrimp	0.0	0.0	0.0	0.1	0.0	0.0	0.0	-
Tuna	2.0	1.0	1.4	1.6	1.1	0.0	0.1	221.2
Lobster	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Edible Fish & Seafood	6.0	8.4	9.6	10.5*	9.5	1.1	0.7	-39.0
Agricultural Products	2,839.0	2,933.5	3,298.7	3,446.6	3,662.9*	314.4	391.5	24.5
Ag. Fish & Forest Prods	2,928.0	3,013.3	3,379.4	3,533.4	3,757.3*	320.8	400.8	24.9

Prepared By: Global Policy Analysis Division/OGA/FAS/USDA
Source: U.S. Census Bureau Trade Data

* Denote Highest Import Levels Since at Least FY 1970
+Values of $0.05 million or more are rounded to $0.1 million

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Fax: (011) (39) 06 4788 7008

Webpage: http://italy.usembassy.gov/agtrade.html
E-mail: agrome@fas.usda.gov

Listing of Italian HRI sector Associations:

Federalberghi
Italian Hotel Association
Via Toscana 1,
00187, Rome, Italy
Tel: + (39) 06 42741151
Fax: + (39) 06 42871197
Website: www.federalberghi.it

Confcommercio
General Confederation of Trade, Tourism, and Services
Piazza G. G. Belli, 2
00153, Rome, Italy
Tel: + (39) 06 58 661
Fax: + (39) 06 58 09 425
Website: www.confcommercio.it

AICA – Associazione Italiana Catene Alberghiere
Italian Hotel Chain Association
Viale Pasteur 10,
00144, Rome, Italy
Tel: + (39) 06 591 3523
Fax: + (39) 06 592 90433
Website: www.aica-italia.it

FIPE – Federazione Italiana Pubblici Esercizi
Italian Federation of Bars and Catering
Piazza G. Belli 2,
00153, Rome, Italy
Tel: + (39) 06 583 921
Fax: + (39) 06 581 8682
Website: www.fipe.it

ANGEM - Associazione Nazionale delle Aziende di Ristorazione Collettiva e Servizi
Italian National Association of the Institutional Food Service
Piazza Risorgimento 10,
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