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Italy

Food Service - Hotel Restaurant Institutional

2015 Italy Food Service - Hotel Restaurant Institutional

Approved By:
Christine Sloop
Prepared By:
Dana Biasetti

Report Highlights:
This report gives an overview of the Italian foodservice, hotel, restaurant and institutional sectors and outlines current market trends, including best product prospects

Post:
Rome

Author Defined:
Section I. Market Summary

Italy's GDP is estimated at $2.148 trillion and it has a per capita GDP of $35,500. It is a net agricultural importer. Italy has a population of roughly 62 million, and Italian is the official language. In 2014, the unemployment rate was 12.8 percent. The ongoing economic crisis has forced Italian consumers to reduce expenses on meals consumed outside the home. With limited disposable income, Italians are skipping traditional full-service restaurants in favor of cheaper venues, such as fast food outlets or bars with happy hours, where consumers pay for drinks and are offered food free of charge. In Italy, meals are traditionally a social gathering. However, Italians tend to gather family and friends at home rather than in full-service restaurants.

In Italy, pizzerias have traditionally been one of the most popular destinations to eat out casually. This is especially true on weekends. Pizzerias have always been less expensive than traditional full-service restaurants. Some Italian consumers still prefer to purchase pizzas for takeaway and/or purchase frozen pizza at the grocery store to be eaten at home. Traditionally, Italians do not recognize breakfast as an important meal, and therefore it is popular to skip breakfast altogether or to just have coffee. In the case that they do eat breakfast at a café' they generally have a sandwich or pastry and a coffee or cappuccino. Cafés (referred to as bars in Italy) are beginning to offer breakfast deals, in order to attract consumers worried about spending too much money. Unlike Americans, Italians rarely eat a full breakfasts including, for example, sausages, cereals, and scrambled eggs. This type of menu is usually only offered in expensive hotels because of their international clientele.

In Italy, breakfast is generally consumed between 07:30 and 09.00 hrs, while lunch is eaten between 13.00 and 14.00, and dinner between 20:00 and 21.30 hrs. All of this varies, and can depend on the nature of an individual's profession and schedule, as well as the region in which they live. Italy's southern regions tend to follow a Mediterranean schedule, and eat dinner later than the northern regions. Italians still generally follow a set meal schedule, but snacking is becoming quite prevalent. Italians are very busy, lack time, and simply like to eat when hungry. The most popular hot drink in Italy is coffee. Usually, a double boiler coffee machine is used at home, but machines that use pods are becoming popular. This is because they are similar in taste to bar coffee. Italians usually enjoy tea during mid-morning or the middle of the afternoon. Sometimes cookies are also eaten then. Many more Italians than in the past are making health a top priority, and thus herbal tea has gained favor. The most popular alcoholic beverages in Italy are wine and beer. Wine is generally always on the dinner table, whilst beer is most often drunk with starchier food, such as pizza.

Due to the economic recession, families with young children have become more likely to eat at a fast food establishment rather than a pizzeria or a traditional full-service restaurant. These families favor fast food outlets, as they are less expensive and tend to have provisions for entertaining children. Another reason why fast food is becoming more popular is that groups that eat together are often composed of different families, and fast food outlets allow each person to pay individually. In 2014, fast food outlets registered an increase in value sales while traditional full-service restaurants suffered considerably. The proliferation of fast food outlets, which enjoyed a 3% increase in numbers in 2014, was connected to this trend.

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.

Section II. Road Map for Market Entry

A. Entry Strategy

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 but usually with a broad product range.

A directory of European importers (many of them HRI suppliers) is available online at the American Foods in Europe Directory. http://www.american-foods.org/index.php European importers of U.S. products are listed by product category and company/country index.

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. Purchasing by hotels, restaurants, and institutions (HRI) remains fragmented and competitive.

Few of them import products directly from other countries, except for items that they purchase in large quantities. Most HRI's would rather buy from central buyers/distributors importing food and beverages. In general, these wholesalers have specialized in products or product groups and some are even experts in food products from a specific country of origin. Thus, specialized importers have an in-depth knowledge of importing requirements, such as product certification, labeling and packaging. They also typically handle shipping, customs clearance, warehousing and distribution of products within the country

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.

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. The health and wellness trend has grown rapidly in Italy, which as a consequence has led to an increased popularity in gluten-free products and interest remains in local quality products made following regional recipes. Whilst in the past, demand for gluten-free products was mainly from consumers suffering from coeliac disease, a larger percentage of customers now are buying gluten-free products within foodservice outlets, as they perceive these as healthier and as a way of avoiding food intolerances. Another section of consumers increasingly are seeking food prepared according to local recipes and using local ingredients, also based on a perception of being more wholesome because of local provenance and familiarity with the food. Nutritious meals with lower fat content and more vegetables and fruits are expected to be given increasing prominence in menu displays.

Success in introducing food products depends mainly on knowledge of the market and personal contact. The U.S. supplier should analyze Italian/EU food law, packaging and labeling requirements, business practices and trade-related laws and tariffs, potential importers and the distribution system. The Office of Agricultural Affairs (OAA) offers guidelines on business practices and import regulations which can be found on the Post's webpage:
http://italy.usembassy.gov/agtrade.html.

B. Market Structure

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. Health food and gluten free items are doing very well too. U.S. exporters should be attentive of the new EC labeling and traceability regulations and be careful about claims. Also, the HRI sector has shown a historic reluctant to purchase any items that must be labeled as genetically engineered per EU GMO requirements.

C. Sub-Sector Profiles

The economic downturn has heavily impacted the development of consumer foodservice in Italy, resulting in declines in value, outlets and transactions in 2014. This factor, along with the increase in the unemployment rate, the closure of many companies, a lack of confidence in future economic prospects, high taxation and labor costs, have impacted the development of the HRI sector in Italy. Independent foodservice operators have declined, while chain outlets have increased. Independent smaller players were the most affected by difficulties in acquiring bank loans during the crisis and a slower ability to react to market threats or opportunities due to the lower liquidity compared to operators that are part of a chain. Conversely, franchise chains benefited greatly from brand awareness, marketing and promotional activities and the technical and management support.

Franchise chains have increased their presence in motorways and railway stations, shopping centers, historical city centers, airports and multiplex cinemas as many independent small operators generally cannot afford the high rents charged in these locations. Tourism has also helped the chains with foreign visitors accounting for a significant percentage of sales for these operators. On average, hotel customers in Italy are 75% of international origin.

Section III. Competition

Italy’s economic situation led to a decline in the number of existing outlets, in the number of transactions per outlet and in value sales within consumer foodservice. There is hope of improvement, however, as there are early signs of recovery indicating that this trend will ease in 2016. The winning choices of successful chained operators seem to involve specializing in a particular product, the construction of a clear and easily recognizable theme, creating a welcoming environment and offering quality products. Themed franchise restaurants or those that specialized in one type of product are able to offer comfortable and familiar locations and fast but high-quality food preparation within sight of the consumer.

Italy is one of the top tourism destinations in Europe with the number of tourists increasing every year, boosting demand for meals in the HRI sector. Restaurant chains, including ethnic and fast food, are gaining market share and are expected to continue growing. Here are some of the key factors relating to changing Italian demographics and consumer habits that are affecting the HRI sector:

- Smaller households – The number of households without children is increasing. The average family has one or no children per household. Also, single person households are increasing.

- Increasing number of women in the workforce. The percentage of women in the workforce is bolstering the demand for more ready-to-eat foods, as well as eating-out frequency.

- Change in eating patterns. The increased presence and success of ethnic foods from all over the world can be seen particularly among the younger population.

- Aging population. An increasing percentage of the Italian population is over 65 years old and this increases the demand for senior citizens centers and/or facilities.

Every year more than 48 million tourists visit Italy, making it the world's fifth most attractive tourist destination. The Italian Hotel and Food Service Industry is a lucrative and growing sector, however, it is also diverse and fragmented. Tourism is one of Italy's fastest growing and most profitable industrial sectors. Many small establishments dominate Italy, including: bed and breakfasts, youth hostels, camping facilities, resorts and rural tourism. The Italian HRI sector serves more than 5.5 million meals a day. On average, hotel customers in Italy are 75 percent of international origin. In terms of product offering, success seems to be almost guaranteed for hotels which offer quality ingredients and local cooking with an emphasis on a gourmet format. This is also of interest to Italian customers if the restaurant has street access, not just access from inside the hotel, and provides menus with reasonable prices.

Overall levels of taxation within the hospitality sector in Italy are increasing, with the introduction of a range of tourist taxes in 2011 alongside with an increase to 22 percent in the Value Added Tax (VAT) in 2013 (following a 1 percent increase in 2011). Italy applies a zero rate on wine, reflecting its position as a major wine producer. In Italy, the HRI sector accounts for about one third of all food consumed. The financial crisis has impacted Italian consumer choices and eating habits. With an unemployment rate of almost 13 percent, many families have drastically reduced their spending and altered their consumption habits.

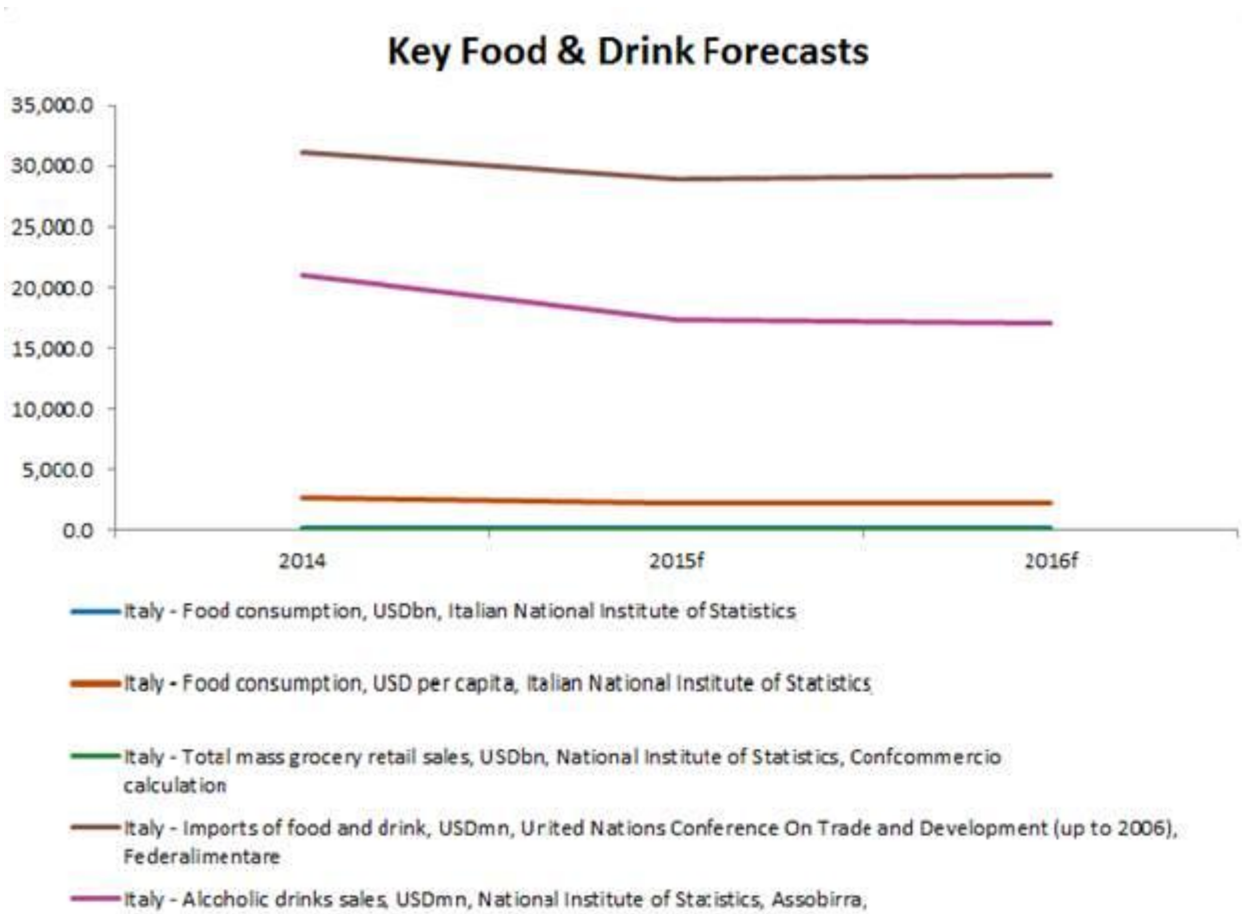
Changing Italian lifestyles, with more workers now forced to spend their lunch hours outside of the home due to either longer commuting times or shorter lunch breaks, have given a boost to the food service industry. Italy is slowly moving towards trends and lifestyles seen in other European countries, 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.

The majority of Italian eating establishments are located in the North, followed by the South and then the Center. 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.

Clear positioning is key to the success of franchise operators in Italy. A clear identity and focus on a few products, or even a mono-product offer, which clearly defined the positioning of the brand, were critical success factors among chained operators. A good example was the Italian Old Wilde West full-service restaurant chain, which combined a western style with foodservice. New formats also include chain full-service restaurants offering hamburgers made with fresh ingredients and cooked within sight of the consumer. Other chain full-service restaurants with a limited offer of specific products, such as buffalo mozzarella, rice, soups, pasta, or fish, are expected to become more popular in Italy. This trend is also set to affect fast food restaurants, focusing on specific menus, such as beef and chicken burgers, pasta, pizza or fish dishes. Specialist coffee shops, consisting of coffee-themed outlets with a focus primarily on serving coffee, will also likely benefit from this trend. Piadinerie, paninerie and porchetta street stalls/kiosks are other channels set to focus on this trend.

Italy	2014	2015 (forecast)	2016 (forecast)
Food consumption	$165.6 billion	$136.2 billion	$133.8 billion
Per capita food consumption	$2,711	$2,227	$2,185

Source: Federalimentare



Sales in Consumer Foodservice by Eat-in/Home Delivery/Takeaway/Drive-Through: % Foodservice Value 2014

% value analysis	Eat in	Home Delivery	Takeaway	Drive-Through
100% Home Delivery/Takeaway	0.0	10.6	89.4	-
Cafés/Bars	97.1	-	2.9	-
Full-Service Restaurants	97.7	-	2.3	-
Fast Food	56.7	8.0	32.3	3.0
Self-Service Cafeterias	85.1	-	14.9	-
Street Stalls/Kiosks	1.5	-	98.5	-
Consumer Foodservice	81.6	1.8	16.4	0.1

Source: Euromonitor

Sales in Consumer Foodservice by Location: % Foodservice Value 2009-2014

% value	2009	2010	2011	2012	2013	2014
Leisure	3.9	4.1	4.1	4.2	4.3	4.3
Lodging	10.5	10.5	10.6	10.6	10.5	10.5
Retail	3.9	4.0	4.2	4.3	4.4	4.6

Travel	4.0	4.1	4.3	4.5	4.6	4.8
Stand-Alone	77.8	77.3	76.8	76.4	76.2	75.9

Source: Euromonitor

Consumer Foodservice by Independent vs Chained: Units/Outlets 2014

Outlets	Independent	Chained	Total
100% Home Delivery/Takeaway	17,376	400	17,776
Cafés/Bars	148,333	2,293	150,626
Full-Service Restaurants	103,934	807	104,741
Fast Food	9,552	2,281	11,833
Self-Service Cafeterias	636	645	1,281
Street Stalls/Kiosks	7,957	102	8,059
Pizza Consumer Foodservice	39,966	479	40,445
Consumer Foodservice	287,788	6,528	294,316

Source: Euromonitor International

Section IV. 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 beers 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 $75.2 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.

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
Sauces and condiments

B. **Products not present in significant quantities but which have good sales potential:**

Snacks
Scallops
Chocolate
Specialty/Microbrew Beer

C. **Products not present because they face significant trade barriers:**
Red meat and meat preparations other than that sold thru the High Quality Beef Quota (hormone ban)
Poultry (sanitary procedures - chlorine wash)
Processed food (with GMO ingredients)

<table>
<tr><th>Product Category</th><th>2014 Imports</th><th>5-Yr. Avg. Annual Import % Growth in value (2009-2014)</th><th>Import Tariff Rate 2014</th><th>Market Attractiveness for USA</th></tr>
<tr><td>Tree Nuts</td><td>$276 million</td><td>18.6</td><td rowspan="5">See at: http://ec.europa.eu/taxation_customs/customs/customs_duties/index_en.htm</td><td>The United States is the biggest supplier of tree nuts to Italy. Most tree nuts are used as ingredients by the food processing sector. Almonds are the most important commodity within this category. Further products with good sales potential include pistachios, pecans and walnuts.</td></tr>
<tr><td>Forest Products</td><td>$176.5 million</td><td>4.7</td><td>The United States is a longstanding supplier of forest products to Italy that are imported mainly for the furniture and building sectors.</td></tr>
<tr><td>Wheat</td><td>$147.3 million</td><td>9.5</td><td>Local production does not satisfy Italian pasta production demand.</td></tr>
<tr><td>Soybean Meal</td><td>$103.1 million</td><td>281.2</td><td>Local production does not satisfy Italian feed demand.</td></tr>
<tr><td>Fish products</td><td>$94.1 million</td><td>5.8</td><td>The Italian market offers lucrative opportunities for fish and seafood products. Fish consumption is growing as consumers associate fishery products with a healthy diet. Best prospects for U.S. and seafood exports are salmon, shrimps, crabs, caviar substitutes,</td></tr>
</table>

				cuttle fish and squid, sea urchins catfish and scallops.
Processed vegetables	$93.4 million	8.3		U.S. exports to Italy are are slowly increasing, especially for off season products. Those products are mostly used as ingredients by the food processing and canned sectors.
Beef and beef products	$74.7 million	122.8		Very good opportunities for U.S. high quality beef produced without growth hormones. The EU quota determines the amount allowed.
Soybeans:	$53.6 million	161.6		Local production does not satisfy Italian feed demand.

U.S. Exports of Agricultural & Related Products to *Italy(*)*
CY 2010 - 2014 and Year-to-Date Comparisons
(in millions of dollars+)

Export Market: *Italy(*)*

Product	Calendar Years (Jan-Dec)					January - September Comparisons		
	2010	2011	2012	2013	2014	2014	2015	%Chg
Bulk Total	217.0	253.2	207.9	335.5	217.5	122.8	230.4	87.6
Wheat	144.0	160.6	130.0	215.5*	163.3	87.9	192.5	119.1
Corn	0.0	7.6	0.0	0.4	0.0	0.0	0.0	-
Coarse Grains (ex. corn)	0.0	10.1	0.0	12.5	0.0	0.0	0.0	-
Rice	0.0	0.2	0.8	1.0	0.6	0.5	0.3	-34.6
Soybeans	36.0	0.7	35.6	54.2	0.1	0.1	0.0	-52.7
Oilseeds (ex. soybean)	0.0	0.2	0.2	0.0	0.1	0.1	0.0	-92.6
Cotton	13.0	37.4	10.6	5.2	5.8	5.0	7.4	49.6
Pulses	15.0	26.1	17.6	26.5	29.2*	15.8	21.4	35.3
Tobacco	2.0	2.1	1.7	3.6	1.7	0.8	0.0	-99.4
Other Bulk Commodities	7.0	8.2	11.4	16.4	16.6	12.6	8.7	-31.1
Intermediate Total	185.0	255.0	196.2	262.1	302.6	178.2	141.0	-20.9
Soybean Meal	10.0	8.9	33.7	119.8	125.9	50.5	35.4	-30.0
Soybean Oil	0.0	0.2	0.3	0.0	0.0	0.0	0.0	-
Vegetable Oils (ex. soybean)	17.0	19.0	16.7	13.9	6.6	5.4	3.2	-39.8
Animal Fats	0.0	0.1	0.1	0.0	0.0	0.0	0.0	717.2
Live Animals	3.0	1.0	0.5	0.4	0.2	0.1	0.0	-85.6
Hides & Skins	84.0	125.9*	61.8	59.9	64.2	47.2	39.8	-15.6
Hay	0.0	0.0	0.0	0.1	0.3*	0.2	0.1	-61.4
Distillers Grains	0.0	3.1	0.0	0.0	0.0	0.0	0.0	-
Feeds & Fodders NESOI	3.0	8.6	4.4	5.0	8.1	5.8	5.7	-2.2
Planting Seeds	32.0	38.2	39.1	32.5	58.0	37.0	27.1	-26.8
Sugar, Sweeteners, Bev. Bases	0.0	0.4	0.8	4.7*	1.0	1.0	0.7	-24.2
Other Intermediate Products	36.0	49.7*	38.8	25.8	38.4	31.0	28.9	-6.7
Consumer Oriented Total	316.0	365.1	351.8	477.6	555.8*	351.1	310.8	-11.5
Beef & Beef Products	32.0	63.4	58.0	68.3	78.4*	58.7	61.8	5.4
Pork & Pork Products	5.0	2.2	0.7	1.2	1.1	0.9	0.7	-22.1
Poultry Meat & Prods. (ex. eggs)	1.0	1.1	0.5	1.3	0.2	0.2	0.1	-51.0
Meat Products NESOI	0.0	0.8	0.3	0.2	0.6	0.6	0.3	-46.1
Eggs & Products	1.0	0.9	3.2	2.4	2.3	1.9	1.0	-47.1
Dairy Products	2.0	1.2	0.9	1.6	1.2	1.0	0.9	-6.3
Fresh Fruit	0.0	0.6	0.1	0.1	0.0	0.0	0.0	-15.7
Processed Fruit	20.0	14.4	13.2	15.4	14.0	10.2	11.2	9.3
Fresh Vegetables	1.0	0.4	0.4	0.3	0.3	0.3	0.1	-50.5
Processed Vegetables	37.0	27.4	45.9	72.3	95.0*	71.9	24.9	-65.4
Fruit & Vegetable Juices	1.0	3.1*	2.0	2.0	0.8	0.8	0.3	-59.5
Tree Nuts	140.0	177.2	164.7	236.3	286.5*	144.3	158.8	10.1
Chocolate & Cocoa Products	0.0	0.7	0.2	0.2	0.3	0.3	0.1	-70.7
Snack Foods NESOI	4.0	3.9	4.8*	4.0	4.0	3.0	2.4	-21.3
Breakfast Cereals	0.0	0.2	0.0	0.0	0.0	0.0	0.0	101.6
Condiments & Sauces	2.0	1.9	2.2*	2.1	1.5	1.4	0.6	-59.6
Prepared Food	4.0	4.5	5.2	9.6	8.8	7.2	6.9	-3.7
Wine & Beer	56.0	49.7	40.1	51.2	53.1	42.9	35.8	-16.6
Non-Alcoholic Bev. (ex. juices)	5.0	5.9*	2.3	1.7	1.0	0.9	1.2	34.5
Dog & Cat Food	4.0	5.0	6.7	7.2	6.5	4.8	3.4	-29.2
Other Consumer Oriented	1.0	0.8	0.3	0.2	0.2	0.1	0.4	214.9
Agricultural Related Products	310.0	283.1	220.3	265.6	293.8	216.4	192.7	-11.0
Distilled Spirits	33.0	31.8	28.5	25.7	30.3	22.9	20.7	-9.7
Ethanol (non-bev.)	0.0	0.0	0.0	0.2	0.2	0.2	0.0	-87.2
Biodiesel & Blends > B30	0.0	2.1*	0.0	0.0	0.0	0.0	0.0	-
Forest Products	189.0	161.4	113.1	159.9	169.1	127.6	113.4	-11.1
Fish Products	88.0	87.8	78.7	79.8	94.2*	65.7	58.5	-10.9
Agricultural Products	717.0	873.2	755.9	1,075.1	1,075.9	652.1	682.1	4.6
Agricultural & Related Products	1,027.0	1,156.3	976.2	1,340.7	1,369.7*	868.5	874.8	0.7

Prepared By: Global Policy Analysis Division/OGA/FAS/USDA
Source: U.S. Census Bureau Trade Data
* Denote Highest Export Levels Since at Least CY 1970
+Values of $0.05 million or more are rounded to $0.1 million
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.

U.S. Imports of Agricultural & Related Products from *Italy(*)*
CY 2010 - 2014 and Year-to-Date Comparisons
(in millions of dollars+)

Import Supplier: *Italy(*)*

Product	Calendar Years (Jan-Dec) 2010	2011	2012	2013	2014	January - September Comparisons 2014	2015	%Chg
Bulk Total	26.0	24.8	28.9	20.8	26.4	20.6	20.4	-0.7
Wheat	0.0	0.2	0.2	0.4*	0.3	0.2	0.2	-22.4
Coarse Grains	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-40.4
Rice	10.0	14.5	12.3	10.8	15.2*	11.5	12.1	5.0
Tobacco	13.0	5.0	8.9	4.4	5.0	4.5	2.8	-37.9
Rubber & Allied Products	0.0	0.2	1.0*	0.2	0.3	0.3	0.3	-4.2
Coffee, Unroasted	1.0	0.6	2.1	1.1	0.6	0.4	0.4	-
Cocoa Beans	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-76.9
Tea, Incl Herb	2.0	3.3	3.7	3.0	4.0	2.9	4.1*	42.7
Raw Beet & Cane Sugar	0.0	0.0	0.0	0.1*	0.0	0.0	0.0	-
Other Bulk Commodities	1.0	1.0	0.5	0.6	0.9	0.7	0.6	-18.1
Intermediate Total	573.0	615.5	638.6	669.3	685.0	518.4	517.5	-0.2
Tropical Oils	0.0	0.0	0.0	0.0	0.0	0.0	0.0	149.2
Other Vegetable Oils	509.0	544.3	547.5	575.5	559.6	425.0	417.1	-1.9
Feeds & Fodders	5.0	3.5	8.0	7.2	10.3*	8.4	5.5	-33.7
Live Animals	0.0	0.3	0.4	0.1	0.3	0.2	1.1*	474.8
Hides & Skins	0.0	0.4	0.2	0.5	0.3	0.2	0.2	1.8
Planting Seeds	5.0	5.9	9.7	9.4	11.5*	8.1	6.0	-25.4
Sugars, Sweeteners, Bev Bases	1.0	2.3	1.8	3.2	3.7*	2.8	1.8	-37.8
Essential Oils	20.0	18.5	18.4	18.0	30.3*	23.2	19.4	-16.5
Cocoa Paste & Cocoa Butter	5.0	5.6	6.4*	5.3	4.6	4.0	3.3	-16.0
Other Intermediate Products	28.0	34.7	46.2	50.1	64.4*	46.4	62.9	35.5
Consumer-Oriented	2,339.0	2,746.5	2,831.1	3,056.4	3,309.7*	2,419.4	2,448.5	1.2
Snack Foods	114.0	132.0	129.1	150.5	153.3*	102.0	101.2	-0.8
Red Meats, FR/CH/FR	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Red Meats, Prep/Pres	62.0	71.8	86.7	97.3	114.3*	80.8	86.6	7.2
Cheese	277.0	311.5	301.3	309.7	307.4	214.8	217.0	1.0
Other Dairy Products	27.0	35.5	44.6*	42.7	42.6	33.5	41.1	22.8
Other Fresh Fruit	16.0	23.1	25.9	36.1	48.7*	28.4	25.8	-9.1
Fresh Vegetables	1.0	5.5	9.4	8.9	9.8*	2.9	3.5	19.7
Processed Fruit & Vegetables	48.0	55.3	66.9	66.7	80.3*	61.0	59.7	-2.1
Fruit & Vegetable Juices	10.0	20.9	22.3	29.6	39.5	28.7	40.7	41.7
Tree Nuts	9.0	11.6	16.1	17.3	25.9*	16.8	19.3	14.9
Wine and Beer	1,311.0	1,549.3	1,537.2	1,669.2	1,759.7*	1,315.4	1,308.2	-0.6
Nursery Products	5.0	5.0	5.9	5.7	4.9	3.8	4.7	21.2
Roasted & Instant Coffee	47.0	60.0	68.3	71.5	82.0*	55.7	72.0	29.2
Spices	3.0*	2.5	1.8	2.3	2.2	1.7	1.4	-16.1
Other Consumer Oriented	408.0	462.5	515.4	548.7	639.0*	473.9	467.3	-1.4
Forest Products	71.0	67.4	78.1	89.0	98.3	75.3	73.3	-2.7
Logs and Chips	0.0	0.0	0.1	0.0	0.1	0.0	0.2	322.1
Hardwood Lumber	1.0	1.9	2.5	2.6	2.6	1.9	2.9	49.7
Softwood and Treated Lumber	0.0	0.2	0.1	0.1	0.0	0.0	0.0	-67.0
Panel Products (Incl Plywood)	22.0	28.3	31.4	32.4	41.5	31.8	32.1	1.0
Other Value-Added Wood Prod	48.0	37.0	44.1	54.0	54.1	41.6	38.1	-8.3
Seafood Products	10.0	11.7	12.0*	10.2	9.8	7.0	6.7	-4.2
Shrimp	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Tuna	1.0	1.5	1.4	1.0	1.3	1.0	0.9	-8.2
Lobster	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Edible Fish & Seafood	9.0	10.2	10.5*	9.1	8.5	6.0	5.8	-3.4
Agricultural Products	2,939.0	3,386.8	3,498.6	3,746.5	4,021.1*	2,958.4	2,986.4	0.9
Ag, Fish & Forest Prods	3,019.0	3,466.0	3,588.8	3,845.6	4,129.2*	3,040.7	3,066.3	0.8

Prepared By: Global Policy Analysis Division/OGA/FAS/USDA * Denote Highest Import Levels Since at Least CY 1970 www.fas.usda.gov/GATS
Source: U.S. Census Bureau Trade Data +Values of $0.05 million or more are rounded to $0.1 million 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 V. Post Contact and Further Information

Local Time

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

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

Key Contacts
USDA FAS Contacts in Rome, Italy

Office of Agricultural Affairs,
Foreign Agricultural Service,
American Embassy, Via Veneto 119a
Rome, 00187, Italy
Webpage: http://Italy.usembassy.gov/agtrade.html
E-mail: agrome@fas.usda.gov
Tel: (011) (39) 06 4674 2396
Fax: (011) (39) 06 4788 7008

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,
20129, Milan, Italy
Tel: +(39) 02 718911
Fax: + (39) 02 76111042
Website: www.angem.it