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Retail Foods

2016 Italian Food Retail and Distribution Sector Report

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Report Highlights:

In 2015, after years of deep recession, Italy showed signs of a long-awaited economic recovery. Affected by diminished disposable incomes and high unemployment, Italian consumers remain very price conscious and tend to seek discounts. With tighter wallets, their changing shopping strategies indicate that now more than ever, they are avidly pursuing true bargains. Major retail brands have embraced the “everyday low price” strategies, increasing their private label ranges. This report provides an overview of the grocery retail sector and how best to place U.S. products in the Italian market.

Post:

Rome

Executive Summary:**Section I. Market Summary**

Italy has a diversified industrial economy, divided into a developed industrial north and a less-developed agricultural south, 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. 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 at \$2.175 trillion, and it has a per capita GDP of \$35,800. Italy has few natural resources, with much land unsuited for farming. It is a net agricultural importer. Most raw materials and ingredients are imported, as Italy's economic strength is in the processing and the manufacturing of goods. Italy exports mainly consumer products to the United States, while the United States exports mostly bulk commodities to Italy.

In 2015, Italy showed signs of a long-awaited economic recovery after years of deep recession. Affected by diminished disposable incomes and high unemployment, Italian consumers remain very price conscious and tend to seek discounts. Italians have always been value-seekers, looking for quality over price and discounts. But with tighter wallets, their changing shopping strategies indicate that now more than ever, they are avidly pursuing true bargains. Shopping has become about finding the same high-quality merchandise, but for the best price. Major retail brands have embraced the "everyday low price" strategies, increasing their private label ranges.

Italian consumer interest in local, organic and healthier food has encouraged grocery retailers to increase their product range by adding more locally-produced packaged food, as well as branded items. In 2015, the fastest growing segment was discounters, as consumers looked for more competitively priced items and were also willing to compromise on quality/product origin in order to save money. As the economy has begun to recover, some consumers are now shifting back to hypermarkets. Food retailing in Italy is extremely important, given that consumers place food in a prominent position on their scale of values and needs. Visual presentation is a key factor when visiting a retailer, as competition is fierce, and all brands try to differentiate themselves by giving consumers more reasons to visit their stores.

In 2016, hypermarkets are expected to recover from the deep recession, with reduced store sizes and increased collaboration between retailers and brands. Supermarkets are expected to continue to struggle in terms of sales because of increased competition from discounters, who are expected to continue to perform positively, mainly due to their increased presence throughout Italy. Traditional grocery retailers are expected to continue to decline faced by increasing competition.

With Amazon.com entering the grocery channel, traditional grocery retail chains will have to face a new competitor who already owns the logistics and customer base. Amazon is soon expected to become the next giant in online food retailing. With the increasing outreach of online retail to younger generations, 2015 witnessed the birth and growth of several local online produce market places which guarantee availability and home delivery of locally-grown and oftentimes organic products. Product delivery is offered only in a limited radius of certain cities in order to guarantee full product and format sustainability.

Grocery Retailers Sales 2010-2015

EUR million	2010	2011	2012	2013	2014	2015
Modern Grocery Retailers	89,558.2	91,397.8	91,916.9	94,121.2	93,512.3	93,161.4
- Convenience Stores	14,655.7	14,802.3	14,537.3	14,653.6	14,747.4	14,778.4
- Discounters	11,264.1	12,093.7	12,676.6	13,152.0	13,612.3	13,734.8
- Forecourt Retailers	249.1	261.8	258.9	254.9	252.8	253.7
-- Chained Forecourts	249.1	261.8	258.9	254.9	252.8	253.7
-- Independent Forecourts	-	-	-	-	-	-
- Hypermarkets	21,792.4	21,378.8	21,064.2	22,417.7	21,780.5	21,922.0
- Supermarkets	41,596.8	42,861.2	43,379.8	43,643.0	43,119.3	42,472.5
Traditional Grocery Retailers	34,565.7	34,138.6	33,769.1	33,355.0	33,089.2	33,054.2
- Food/Drink/Tobacco Specialists	19,792.5	19,240.6	18,961.6	18,709.4	18,559.7	18,441.0
- Independent Small Grocers	13,731.7	13,831.5	13,731.9	13,579.5	13,470.9	13,557.1
- Other Grocery Retailers	1,041.6	1,066.5	1,075.5	1,066.1	1,058.6	1,056.2
Grocery Retailers	124,123.9	125,536.4	125,685.9	127,476.2	126,601.5	126,215.6

Source: Official statistics, Euromonitor and Italian trade associations

Forecast Grocery Retailer Sales 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Modern Grocery Retailers	93,161.4	93,070.9	92,996.2	93,021.5	93,130.6	93,298.5
- Convenience Stores	14,778.4	14,871.5	14,901.3	14,920.7	14,928.1	14,925.1
- Discounters	13,734.8	13,850.2	13,958.2	14,047.6	14,126.2	14,168.6
- Forecourt Retailers	253.7	254.9	256.9	259.2	261.8	264.7

-- Chained Forecourts	253.7	254.9	256.9	259.2	261.8	264.7
-- Independent Forecourts	-	-	-	-	-	-
- Hypermarkets	21,922.0	22,097.4	22,302.9	22,541.6	22,830.1	23,136.0
- Supermarkets	42,472.5	41,996.8	41,576.8	41,252.5	40,984.4	40,804.1
Traditional Grocery Retailers	33,054.2	33,156.9	33,293.2	33,515.9	33,782.9	34,110.5
-						
Food/Drink/Tobacco Specialists	18,441.0	18,525.8	18,625.8	18,789.7	18,977.6	19,190.2
- Independent Small Grocers	13,557.1	13,573.4	13,605.9	13,660.4	13,734.1	13,841.2
- Other Grocery Retailers	1,056.2	1,057.7	1,061.4	1,065.8	1,071.1	1,079.1
Grocery Retailers	126,215.6	126,227.7	126,289.4	126,537.4	126,913.5	127,409.0

Source: Official statistics, Euromonitor and Italian trade associations

Grocery Retailer Outlets 2010-2015

outlet	2010	2011	2012	2013	2014	2015
Modern Grocery Retailers	32,067.0	32,602.0	31,563.0	29,917.0	29,860.0	29,744.0
- Convenience Stores	16,495.0	16,017.0	15,123.0	14,768.0	14,496.0	14,245.0
- Discounters	4,320.0	4,626.0	4,730.0	4,637.0	4,830.0	4,852.0
- Forecourt Retailers	802.0	897.0	977.0	1,044.0	1,074.0	1,095.0
-- Chained Forecourts	802.0	897.0	977.0	1,044.0	1,074.0	1,095.0
-- Independent Forecourts	-	-	-	-	-	-
- Hypermarkets	743.0	831.0	820.0	840.0	801.0	837.0
- Supermarkets	9,707.0	10,231.0	9,913.0	8,628.0	8,659.0	8,715.0
Traditional Grocery Retailers	246,606.0	243,117.0	237,875.0	235,467.0	230,326.0	225,614.0
-						
Food/Drink/Tobacco Specialists	124,941.0	122,502.0	119,525.0	118,844.0	116,576.0	114,244.0
- Independent Small Grocers	78,792.0	78,343.0	76,619.0	75,309.0	72,779.0	70,596.0
- Other Grocery Retailers	42,873.0	42,272.0	41,731.0	41,314.0	40,971.0	40,774.0
Grocery Retailers	278,673.0	275,719.0	269,438.0	265,384.0	260,186.0	255,358.0

Source: Official statistics, Euromonitor and Italian trade associations

Retail Sector Strengths and Weakness

Advantages	Challenges
Italians are traveling more and becoming more aware of foreign cuisines.	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.	The Italian retail sector is extremely fragmented, and the mandatory customs duties, sanitary inspections, and labeling requirements can be onerous.
Interest in new and innovative products, especially with a health benefit.	Competition from similar food products produced in other EU countries that enter tariff free.
American food and food product remain quite popular in Italy.	Complying with European and Italian Regulations.
Interest in new and innovative products, especially with a health benefits.	Competition from similar food products produced in other EU countries that enter tariff free.
Italian consumers demand quality, innovative, healthy products	Adapting products to Italian consumer tastes and expectations

Section II. Road Map for Market Entry

The best way to begin exporting to Italy is to either identify a key importer, broker, distributor, agent or wholesaler as they know how to best navigate the import and distribution process and are able to engage directly with Italian food retailers. They are key to doing business in Italy. Food importing is a specialized business, and an importer plays a pivotal role in navigating the hurdles of Italian and EU food law. Importers normally carry a whole range of products. The terms and length of association between the U.S. Company and the Italian company are normally established by contract.

Market Structure

Italian importers are usually small to medium-sized companies, rather than the large, market-dominating varieties found in northern Europe. Consequently, these companies import on a smaller scale, but often a broader range of products than their much larger counterparts. Most imported food products enter the Italian market through brokers or specialized traders. Price is an increasingly important basis for import purchase decisions, although quality and novelty do move some products. Imported products from North America often enter Italy indirectly from the Netherlands' Port of Rotterdam or directly via air.

- Survey existing and potential opportunities by reviewing FAS GAIN reports and consider

engaging a market research firm to assist in analyzing market opportunities and challenges.

- Establish a relationship with an Italian importer/distributor that provides services to the food-processing or retail sectors.
- Be prepared to start small by shipping a few pallets or cases of a product and recognize that it could take several months or years before an importer is ready to order full containers. Italians place a lot of importance on first building the trust to consolidate the business relationship.
- Be willing to meet special EU labeling requirements and consider working through a consolidator or participating in mixed container shipments.

Participation in some of the larger European international food trade shows (ANUGA and SIAL) offers a good opportunity to get a sense of the Italian market and provides the opportunity to meet potential Italian importers or distributors. Market entry to the Italian retail sector requires patience and substantial homework on the part of the U.S. exporting company to ensure that all import regulations and labeling laws are met.

Major Players in the Italian Food Retail Market

AGORA' NETWORK

Via Pergolesi, 25 - 20124 Milano (MI)

Tel. 02.67339801 - Fax 02.67339820

www.agera-net.it

Sales: €2.2 billion

AUCHAN S.p.A.

Strada 8 palazzo N - 20089 Milanofiori di Rozzano (MI)

Tel. 02.5752801 - Fax 02.57512438

www.auchan.it

Sales: n/a

BENNET S.p.A.

Via Enzo Ratti, 2 - 22070 Montano Lucino (CO)

Tel. 031.4751111 - Fax 031.4711110

P.IVA 07071700152

www.bennet.com

Sales: €1.7 billion

CARREFOUR ITALIA - GS S.p.A.

Via Caldera, 21 - 20100 Milano (MI)

Tel. 02.48251 - Fax 02.4820325
P.IVA 12683790153
www.carrefouritalia.it
Sales: €4.7 billion

CONAD.

Via Michelino, 59 - 40127 Bologna (BO)
tel 051.508111 - fax 051.508414
P.IVA 03320960374
www.conad.it
Sales: €12 billion

COOP ITALIA

Via del Lavoro, 8 - 40033 Casalecchio di Reno (BO)
Tel. 051.596111 - Fax 051.596512
P.IVA 01515921201
www.e-coop.it
Sales: €12.4 billion

CRAI S.coop.r.l.

Centro Direzionale Milano 2 - Palazzo Canova via F. Cervi - 20090 Segrate (MI)
Tel. 02.210891 - Fax 02.21080401
P.IVA 01760230159
www.crai-supermercati.it
Sales: €4.8 billion

DESPAR ITALIA

Via Cristoni, 82 - 40033 - Casalecchio di Reno (BO)
Tel. 051.6118020 - Fax 051.6118040
P.IVA 00820910156
www.desparitalia.it
Sales: €3.1 billion

ESSELUNGA S.p.A.

Via Giambologna, 1 - 20096 Limoto di Pioltello (MI)
Tel. 02.923671 - Fax 02.9267202
P.IVA 04916380159
www.esselunga.it
Sales: €7 billion

EUROSPIN ITALIA S.p.A.

Via Campalto 3/d - 37036 San Martino Buon Albergo (VR)

Tel. 045.8782222 - Fax 045.8782333

P.IVA 02536510239

www.eurospin.it

Sales: n/a

FINIPER S.p.A.

Via Mameli, 19 - 27054 Montebello della Battaglia (PV)

Tel. 0383.894511 - Fax 0383.892257

P.IVA 10893660158

www.iper.it

Sales: €1.6 billion

IL GIGANTE S.p.A

Via Clerici, 342 – 20091 Bresso (MI)

Tel. 02.2404251 - Fax 02.26224302

P.IVA 00806410155

www.ilgigante.net

Sales: n/a

LIDL ITALIA S.r.l.

Via Augusto Ruffo, 36 - 37040 Arcole (VR)

Tel. 045.6135111 - Fax 045.6135190

P.IVA 02275030233

www.lidl.it

Sales: €3 billion

METRO ITALIA CASH & CARRY S.p.A

Via XXV aprile, 25 - 20097 San Donato Milanese (MI)

Tel. 02.51711 - Fax 02.51714401

P.IVA 02827030962

www.metro.it

Sales: €722 million

SELEX GRUPPO COMMERCIALE S.r.l.

Viale Cristoforo Colombo, 51 - 20090 Trezzano sul Naviglio (MI)

Tel. 02.484571 - Fax 02.48457700
P.IVA 04218940155
www.selexgc.it
Sales: €1 billion

SIGMA S.coop.r.l.
Via Paolo Nanni Costa, 30 - 40133 Bologna (BO)
Tel. 051.6428511 - Fax 051.6428500
P.IVA 00290770379
www.supersigma.com
Sales: €6 billion

SISA S.p.A.
Blocco 1B Galleria B N.186/196 Centergross - 40050 Funo di Argelato (BO)
Tel. 051.6635511 - Fax 051.6646334
P.IVA 00495791204
www.sisaspa.com
Sales: €2.5 billion

SUN
Via Paracelso, 18 - 20041 Agrate Brianza (MB)
Tel.039.6820077 - Fax: 039.6421840
www.gabriellispa.it
Sales: €2.4 billion

Italy's food distribution system has noticeable differences in terms of sector growth between the north and south. Italy's diversified industrial economy is divided by a developed industrial north dominated by private companies, and a less-developed agricultural south afflicted with high unemployment. This division is reflected in the distribution of retail outlets, with the majority of the supermarkets located in the north (53 percent), followed by the south (27 percent) and then by the central region of Italy (20 percent).

While small neighborhood shops and specialty stores are still the norm, Italian consumers are discovering the convenience of large supermarket and hypermarket outlets. Italians still place great value on the quality and freshness of products (rather than frozen), which is reflected in the practice of daily shopping, rather than weekly bulk shopping. Larger supermarket and hypermarket stores are introducing private label brands. Italian consumer purchasing habits place great value on the freshness and quality of products, therefore shopping several times a week versus other European countries where consumer patterns show a greater tendency towards once a weekly bulk purchasing.

Larger food retailers are starting to appeal to those consumers who are attracted by the convenience that one-stop shopping offers, and appreciate the wide range of products and additional services that larger retail formats provide. Social changes, including smaller family sizes, longer working hours, more working women, and an increasing number of single households. An ageing population also is contributing to this change.

Hypermarkets in Italy continued to face difficulties up to 2014, as consumers were no longer as keen on doing one large grocery shop a week as they had been pre-recession. On the contrary, consumers preferred to shop for less but more often, buying only what was necessary in order to avoid products spoiling. This generated a positive effect for smaller retail environments, such as chained convenience stores strategically located in city centers and which were easy to reach without a car. The fastest growth channel in sales terms in 2015 was discounters. Discounters grew steadily during the recession as consumers looked for more competitively priced items and were also willing to compromise on quality/product origin in order to save money.

Convenience stores recorded a flat value performance in 2015, while the number of outlets declined by 2 percent. Selling space also witnessed a decline given that retailers preferred stores with smaller square meter counts than in the past, looking for lower operating costs. As major grocery retailers, such as Carrefour or Pam, began investing in this format, the channel witnessed some growth in sales but also witnessed upgrades in terms of its offer and store layouts.

Traditional grocery retailers faced difficult times during the recession, due to declining sales and increased taxation and operating costs. As a result, a large number of traditional independent stores closed their operations. As the economy recovers, however, traditional retailers have an opportunity to increase their business due to consumers' willingness to purchase local and healthier items. By focusing on locally-sourced and organic products, many traditional retailers have been able to survive. Similarly, consumers in Italy like convenience and independent small grocers who sell semi-prepared products and fresh ready meals are witnessing positive momentum. In the case of butchers, for example, selling meat that has already been spiced or marinated, or that is stuffed with vegetables and cheese, is considered a benefit by consumers who can save time by focusing only on the cooking part, rather than the upfront preparation of the ingredients.

Private label brands continue to gain momentum, and have graduated from staple products to organic, gluten free and other specialty products. Social changes, including smaller family sizes, an increasing number of single households and an aging population have affected consumption patterns. Demand for single-portion products, ready-made food products and convenience foods have increased. However, there are now signs that the combination of rising food prices and stagnant economic growth may be encouraging more Italian consumers to move away from branded products, providing a boost to producers of private labels. Italian consumers are quite discerning, and are prepared to sacrifice in other areas to ensure they buy quality food ingredients. The linkage between brand/quality may partly explain Italian consumers' reluctance to embrace private label products. Brand name producers currently even dominate the market for staple products, such as milk and pasta.

The leading players in the Italian food retail and distribution sector are Coop Italia, Conad, Selex, Esselunga, Gruppo Auchan, Carrefour, Eurospin, Despar, Sigma and Gruppo Pam. Despite the continued presence of traditional outlets, as well as increased competition from domestic and international retailers, these retailers occupy a dominant position in the market. Four of the leading players - Coop Italia, Interdis, SPAR and Conad - exist as consortiums of smaller operators and owe some of their success to their detailed knowledge of local requirements and shoppers' preferences. Other major mass grocery retailers in terms of sales revenue include Esselunga and Gruppo Pam. The principal foreign investors are the major French retailers Carrefour and Auchan.

Major Food Retailers - Italian Market Share 2007-2015

The year 2015 was one of movement in terms of mergers and acquisitions at the purchasing group level. After closing its collaboration with Leclerc, CONAD - Consorzio Nazionale Dettaglianti joined the Core buying alliance together with Colruyt and Coop Swiss. In August 2015, the group joined the international group called Alidis. At the same time, Coop Italia joined Coopernic Alliance together with Leclerc and Rewe. Other smaller retail chains operating mainly in the south of Italy joined Gruppo Vegè, while increasingly more independent small retailers joined Sigma or Coralis, a sign that joining a retail network offers a better possibility of sales success.

Section III. Competition

Product Category Total imports 2015 (quantity and value)	Major supply sources (% value)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Fresh Fruit Imports: 2 million tons Value: \$1.8 billion	Spain – 31% Costa Rica – 13% Colombia – 7%	Spain is geographically close and has developed a long-standing reputation in the market. Costa Rica and Colombia are price competitive.	Increased domestic consumption. Local suppliers are affected by rising production costs.
Snack Foods Imports: 277,818 tons Value: \$1 billion	Germany – 33% France – 14% Belgium – 10%	Germany, France, and Belgium are geographically close and have developed a long-standing reputation in the market.	Good demand for salty, sweet, and chocolate products. Growing demand for new exotic flavors (olive oil, chili...), combined with a healthier content.

<p>Beer</p> <p>Imports: 717 million liters Value: \$600 million</p>	<p>Germany – 43% Denmark – 10% Belgium – 9%</p>	<p>Germany, Denmark, and Belgium are geographically close, have developed a long-standing reputation in the market, and are price competitive.</p>	<p>Although the Italian drinking culture has always been focused on wine, things have been changing recently. The beer market is growing with increased imports, new breweries and pubs where high quality beer is served at reasonable prices.</p>
<p>Wine</p> <p>Imports: 272 million liters Value: \$351 million</p>	<p>France – 50% Spain – 21%</p>	<p>France and Spain have developed a long-standing reputation in the market and are price competitive.</p>	<p>The United States is the fourth largest wine producing country in the world after Italy, France, and Spain. American wines offer great value, with prize-winning vintages at reasonable prices, and are increasingly available in Italy and Europe.</p>
<p>Chocolate</p> <p>Imports: 73,190 tons Value: \$311 million</p>	<p>Germany – 44% Belgium – 17% France – 14%</p>	<p>Germany and Belgium are geographically close and have developed a long-standing reputation in the market.</p>	<p>Growing demand from manufacturers, confectionary and snack industry.</p>

Section IV. Best Products Prospects

Products present in the market that have good sales potential

Commodity	Imports 2015 \$	Imports from U.S. \$	2011-2015 Average annual import % growth	Key constraints over market development	Market attractiveness for the U.S.
Fresh Fruit	1.8 billion	765,797	+48	Competition from Italy and other EU countries.	Increased domestic consumption and availability of off season produce.
Snack Foods and Chocolate	1 billion	3.2 million	+1.5	Competition from Italy and other EU countries.	Good demand for salty, sweet, and chocolate products.
Beer	600	2.9	+96	Competition	Although the Italian drinking culture

	million	million		from EU countries. Transportation costs and time.	has always been focused on wine, things have been changing recently. The beer market is growing with increased imports, new breweries and pubs where high quality beer is served at reasonable prices.
Wine	351 million	43.7 million	+1	Competition from Italy and other EU countries.	The United States is the fourth largest wine producing country in the world after Italy, France, and Spain. American wines offer great value, with prize-winning vintages at reasonable prices, and are increasingly available in Italy and Europe.
Chocolate	311 million	388,009	+10.5	Competition from other EU countries.	Growing demand from manufacturers, confectionary and snack industry.

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

Functional and health food
Free-from products (lactose-free, gluten-free)
Specialty foods, snack foods and sauces
Organic Products

Products not present because they face significant trade barriers:

Beef, other than that sold thru the High Quality Beef Quota
Poultry (sanitary procedures – chlorine wash)
Processed food products containing biotech ingredients

Section IV. 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.

Trade & Demographic Information - Italy 2015

Agricultural, Fish/Forestry Imports from the	Consumer Food Imports from the U.S.
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U.S. \$1.3 billion	\$480 million
Fish and Seafood Imports from the U.S. \$88.5 million	Unemployment Rate: 11.9 percent
Italian Population 62 million	Total Rural Population: 20 Million
Foreign Population 5 million (approx.)	Total Urban Population: 40 Million
Gross Domestic Product: \$2.1 trillion	Per Capita Income: \$35,800
Exchange Rate: EURO per U.S. Dollar Average 2015: €0.885 = \$1.00	Labor Force 26 million

Source: BICO, ISTAT, Global Trade Atlas, and European Central Bank

Key Contacts

USDA FAS Contacts in Rome, Italy

Office of Agricultural Affairs,
Foreign Agricultural Service,
American Embassy, Via Veneto 119a
Rome, 00187, Italy

Webpage: <https://it.usembassy.gov/embassy-consulates/embassy/sections-offices/fas/>

E-mail: agrome@fas.usda.gov
Tel: (011) (39) 06 4674 2396
x: (011) (39) 06 4788 7008

FAS Italy Attaché Reports

FAS Attaché reports can be found on our office website at: <https://it.usembassy.gov/embassy-consulates/embassy/sections-offices/fas/>

- The Italy Exporter Guide contains a general overview of the macro-economic situation, discusses demographic trends, food trends, offers exporter business tips and shares overviews of the food retail and HRI sectors.
- The Italy Food & Agricultural Import Regulations and Standards (FAIRS) and Certificates reports provide an overview of import regulation standards and required health and origin certificates.
- The Food Service - Hotel Restaurant Institutional report provides a road map for exporters who wish to enter the food service market
- Select market briefs, commodity reports and policy updates

