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Prepared By: Dimosthenis Faniadis

Approved By: Neil Mikulski

Report Highlights:

This report provides an overview of the Italian food retail and distribution sectors and outlines current market trends, including best product prospects. Italy's retail food sales reached \$202.9 billion in 2025, a 4.3 percent increase from 2024. Increased sales were registered across the sector, including discount stores (+7 percent), supermarkets (+4 percent), convenience stores (+2 percent), small local grocers (+2 percent), hypermarkets (+2 percent), and small local grocers (+2 percent).

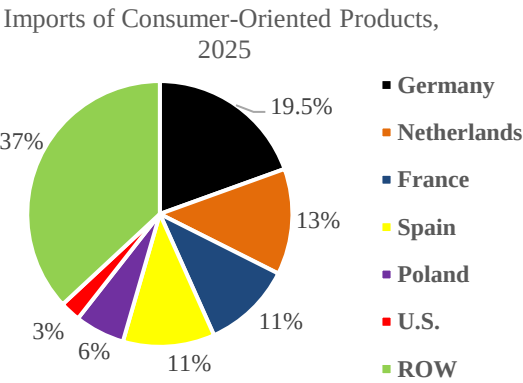
Market Fact Sheet: Italy

Executive Summary

Italy's economy is the eighth largest in the world and the third largest in the euro-zone, with a GDP estimated at \$2.5 trillion and a per capita GDP of \$43,288 in 2025. Being a net agricultural importer, most raw materials and ingredients are imported, as Italy's economic strength is in the processing and the manufacturing of goods. Italy exports mainly consumer-oriented products to the United States, while the United States exports mostly bulk commodities to Italy. In 2025, U.S. agricultural exports to Italy were \$1.9 billion, while U.S. imports from Italy were \$8.4 billion.

Imports of Consumer-Oriented Products

In 2025, Italy's imports of consumer-oriented products were \$43.4 billion, of which 83 percent originating from other EU member states. Imports from the EU were primarily dairy products, meat, and fruits and vegetables.



Food Processing Industry

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

Food Retail Industry

The Italian food retail industry is highly diversified. Hypermarkets, supermarkets, convenience stores, major discount stores, and specialized stores coexist with traditional corner grocery stores and open-air markets. Italy's food retail sales reached \$179.5 billion in 2024, up 2.6 percent compared to the previous year. Increased sales were registered in discounters (+5.1 percent), supermarkets (+3.0 percent), grocery retailers (+1.8 percent), and hypermarkets (+0.2 percent).

Quick Facts CY 2025

Imports of Consumer-Oriented Products: \$43.4 billion

List of Top 10 Growth Products in Italy

- 1) Tree Nuts
- 2) Chocolate Confectionary
- 3) Beef
- 4) Dairy products
- 5) Baked Goods
- 6) Food Preparations
- 7) Processed Vegetables
- 8) Coffee
- 9) Poultry
- 10) Processed Vegetables

Food Industry by Channels (\$ billion)

Food Exports	\$64.0
Food Imports	\$36.6
Retail Food	\$179.5
Food Service	\$90.8

Top 10 Italian Retailers

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

GDP/Population

Population: 58.9 million
GDP: 2.5 trillion
GDP per capita: \$43,288

Strengths/Weaknesses/Opportunities/Threats

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

Data and Information Sources:

Trade Data Monitor (TDM), LLC; Euromonitor; industry contacts.

Contact: OAA Rome, Italy

E-mail: agrome@usda.gov

Tel: (011)-(39)-06-4674-2396

Section 1. Market Summary

The Italian retail food market is modern and diverse. Hypermarkets, supermarkets, convenience, discount, and specialty stores co-exist alongside traditional corner shops and open-air markets. Convenience stores and small supermarkets are commonly located in densely populated areas and town centers while hypermarkets and supermarkets are found in larger shopping complexes on the outskirts of cities.

Italy's retail food sales reached \$202.9 billion in 2025, a 4.3 percent increase from 2024. Increased sales were registered across the sector, specifically at discount stores (+7 percent), supermarkets (+4 percent), convenience stores (+2 percent), small local grocers (+2 percent), hypermarkets (+2 percent), and small local grocers (+2 percent).

Supermarkets continue to have the highest penetration for retail food sales in Italy. Stable inflation and an uptick in promotional activities helped push in-store sales up 4 percent over last year's total. While e-commerce is growing in Italy, shopping at supermarkets remains the primary method for retail food purchases, especially for consumers over age 50.

Grocery retailers tailor product offerings to meet Italy's evolving consumer preferences, expanding the range of locally grown, but also ethnic, vegan and vegetarian alternatives, "free from" products (e.g. gluten, lactose, or sugar free), and "super foods." Furthermore, given Italy's rapidly ageing population proximity and convenience will be an increasingly important factor for where and how people choose to shop in the market (Euromonitor, 2026). Health, wellbeing, fitness and self-care remain focal points for Italians and contributed to positive sales for retailers that cater to these consumer trends

Key drivers and consumption trends

- Shoppers frequently compare prices, use promotions, and visit multiple stores to stretch their budgets.
- Aging population and increased consumer health consciousness fuels Italy's demand for health and wellness products, as well as functional foods.
- Demographic evolution is driving change in consumer buying habits, as single and two person households are growing, while households of four or more are declining.
- Locally grown, but also ethnic, vegan, vegetarian, and flexitarian alternatives, and "free from" products (e.g. gluten, lactose, or sugar free) attract Italian consumers.
- Consumers increasingly require traceability and information about production methods as well as sustainability practices.
- On-demand grocery delivery platforms are offering food at prices that compete with traditional supermarkets.

Advantages	Challenges
Italians are becoming more aware of foreign cuisines.	Competition in the Italian food market is fierce, and many consumers prefer traditional Italian products.
Italy is a member of the Euro zone, which eases market entry.	The Italian retail sector is fragmented, and 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 from EU countries that enter tariff-free.
American food and food products remain quite popular in Italy.	Complying with European and Italian regulations.
There are many specialty importers interested in buying from the United States.	Italy has well-established brands for mainstream products, and private label products remain popular.

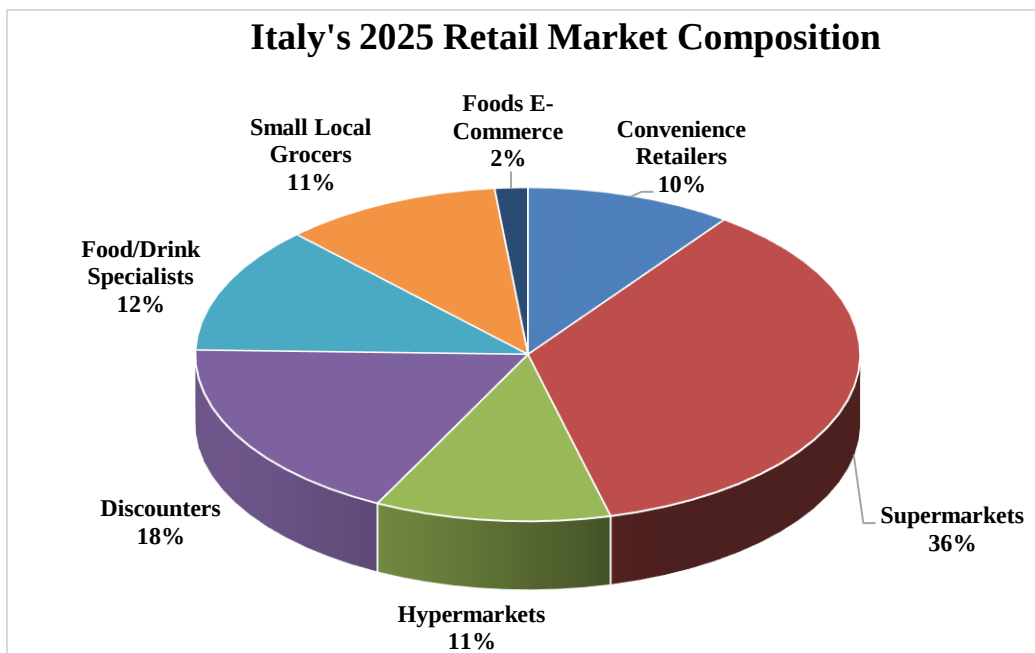


Chart 2: Italy's 2025 Retail Market Composition

Section 2. Roadmap for Market Entry

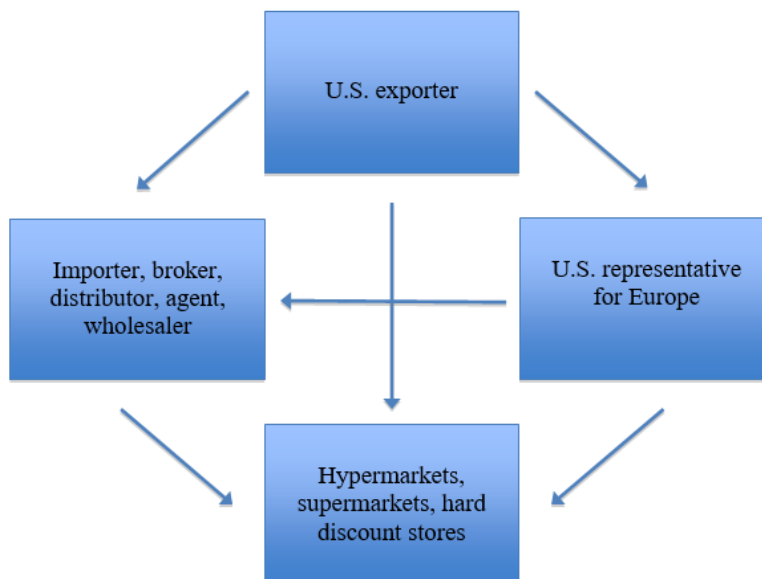
○ Entry Strategy

- 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.
- Identify a key importer, broker, distributor, agent, or wholesaler, as they know how to best navigate the import and distribution process and can engage directly with Italian food retailers.
- Price is important, although quality and novelty do help move some imported products.

- Be prepared to start small by shipping a few pallets or cases of a product and recognize it could take several months or years before an importer is ready to order full containers. Italians place high importance on building trust before expanding a business relationship.
- Be willing to meet special EU labeling requirements and consider working through a consolidator or participate in mixed container shipments.
- Participation in some of the larger European international food trade shows (ANUGA, SIAL, and TUTTOFOOD) to get a sense of the Italian market and the opportunity to meet potential Italian importers or distributors.
- Please contact the USDA Foreign Agricultural Service (FAS) Office in Rome for clarification on any export-specific questions.

○ Market Structure

Most imported food products enter the Italian market through brokers or specialized traders. Italian importers are usually small to medium-sized companies, rather than larger entities found in northern Europe. Consequently, these companies import on a smaller scale but often have a broader range of products than their larger counterparts. Imported products from North America often enter Italy indirectly from the Netherlands' Port of Rotterdam or directly via air.



○ Leading Food Retailers

- [Conad](#)
- [Esselunga SpA](#)
- [Coop Italia](#)
- [Selex Gruppo Commerciale SpA](#)
- [Crai Secom SpA](#)

- [Gruppo VèGè](#)
- [Lidl Italia](#)
- [Consorzio C3](#)
- [D.IT Distribuzione Italiana Soc. Coop.](#)
- [Carrefour Italia](#)
- [Spar International](#)

○ Import procedures

To the extent that EU food laws have been harmonized, Italy's food laws and regulations follow EU rules. Similarly, Italy employs the same tariffs and border measures as EU member states. Products imported into Italy must meet all Italian and EU food safety and quality standards, as well as labeling and packaging regulations.

For more information, see the latest *Italy Food and Agricultural Import Regulations and Standards (FAIRS)* and *Italy FAIRS Certificate* reports at: <https://gain.fas.usda.gov/#/>. You may also want to review the [FAIRS reports produced by the U.S. Mission to the EU](#), in Brussels, Belgium.

Section 3. Competition

More than 70 percent of Italy's agricultural imports (by value) are sourced from EU-27 countries due to proximity and price competitiveness. Also, products made in Italy account for the largest share of the country's total annual retail food sales.

Leading suppliers of consumer-oriented products to Italy

Partner Country	January - December (Value: USD)			%Δ 2024/25	Market Share (%)		
	2023	2024	2025		2023	2024	2025
World	34,851,131,593	37,244,371,030	43,364,021,963	16.4	100	100	100
Germany	6,854,521,772	7,506,087,753	8,437,070,989	12.4	19.7	20.2	19.5
Netherlands	4,511,050,448	4,662,317,210	5,593,097,165	20.0	12.9	12.5	12.9
Spain	3,951,162,770	4,224,255,569	4,872,277,401	15.3	11.3	11.3	11.2
France	4,240,928,108	4,397,685,388	4,716,639,886	7.3	12.2	11.8	10.9
Poland	2,077,086,721	2,213,702,369	2,650,084,042	19.7	6.0	5.9	6.1
Belgium	1,806,248,509	1,779,585,489	2,211,488,506	24.3	5.2	4.8	5.1
Austria	1,331,262,312	1,401,876,315	1,539,596,026	9.8	3.8	3.8	3.6
United States	730,181,150	847,203,794	1,077,037,005	27.1	2.1	2.3	2.5
Greece	672,851,573	682,617,352	868,352,849	27.2	1.9	1.8	2.0
Turkey	576,627,878	733,583,097	807,316,917	10.1	1.7	2.0	1.9

Source: TDM, LLC

Competitive situation for selected consumer-oriented products

Commodity	Italy's imports from the world 2025	Italy's imports from the United States 2025	Key constraints over market development	Market attractiveness for the United States
Beef and beef products	\$3.8 billion	\$53 million	Competition from other EU countries, mainly Poland, France, the Netherlands, and Germany.	Growing consumer demand.
Tree nuts	\$2.4 billion	\$541.4 million	U.S. is the leading supplier. Competition from Türkiye, Spain, and Chile.	Growing demand from manufacturers, confectionary, and snack industry.
Bakery goods, cereals, and pasta	\$2.4 billion	\$1.1 million	Competition from other EU countries, mainly Germany, France, Spain, and Belgium.	Growing consumer demand. Strong demand for pasta.
Processed vegetables	\$2.2 billion	\$32 million	Competition from other EU countries, mainly Spain, France, the Netherlands, and Belgium.	Growing consumer demand and manufacturers demand for potatoes and tomatoes.
Distilled spirits	\$729 million	\$61 million	U.S. is the leading supplier. Competition from UK, France, and Spain.	Growing consumer demand. Tourism boosts consumption.

Source: TDM, LLC

Section 4. Product Prospects

- **Top consumer-oriented products imported from the world**
 - Dairy products (especially cheese; milk and cream; and yogurt)
 - Beef and beef products
 - Pork and pork products
 - Chocolate and cocoa products

- **Top consumer-oriented products imported from the United States**
 - Tree nuts (mostly almonds and pistachios; however, walnut and hazelnut imports growing)
 - Distilled spirits (rum and tafia; whisky)
 - Beef and beef products
 - Processed vegetables (tomato sauce)
- **Products present in the market which have good sales potential**
 - Tree nuts
 - Distilled spirits
 - Food preparations
 - Sauces, dressings, and condiments
- **Products not present in significant quantities, but which have good sales potential**
 - Functional and health food
 - Free-from products (lactose-free, gluten-free, sugar-free)
 - Specialty foods
 - Beef, sold under the High-Quality Beef Quota
- **Products not present in the market because of significant trade barriers**
 - Poultry (sanitary procedures – chlorine wash)
 - Processed food products containing genetically engineered (GE) ingredients

Section 5. Key Contacts and Further Information

Office of Agricultural Affairs, Foreign
Agricultural Service, U.S. Embassy Rome

Phone: (011)-(39)-06-4674-2396

Physical Address: Via Veneto, 119a -
00187 Rome, Italy

Email: agrome@usda.gov

<http://www.fas.usda.gov>

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

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

For more information on Italian regulatory agency and Ministry contacts, please see the latest *Italy Food and Agricultural Import Regulations and Standards (FAIRS)* and *Italy FAIRS Certificate* reports at: <https://gain.fas.usda.gov/#/>.

Attachments:

No Attachments