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Report Highlights:

This report provides an overview of Italy's food service – hotel, restaurant, and institutional (HRI) sectors and outlines current market trends for food products. In 2024, Italy's consumer food service sales were nearly $97 billion, up 1.7 percent from 2023. Italy's HRI growth is likely to continue through the remainder of 2025 and 2026 and offers opportunities for U.S. consumer-oriented product exports.

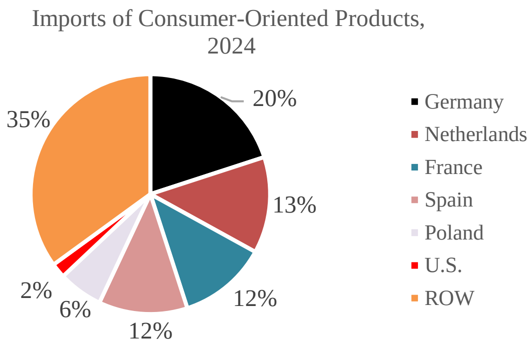
Market Fact Sheet: Italy

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 $2.3 trillion and a per capita GDP of $40,226 in 2024. 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 2024, U.S. agricultural exports to Italy were $1.7 billion, while U.S. imports from Italy were $8.9 billion.

Imports of Consumer-Oriented Products

In 2024, Italy's imports of consumer-oriented products were $38.3 billion, of which 84 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 2024

Imports of Consumer-Oriented Products: $38.3 billion

List of Top 10 Growth Products in Italy

1) Coffee
2) Vegetable Oils
3) Dairy Products
4) Beef
5) Food Preparations
6) Chocolate Confectionary
7) Tree Nuts
8) Processed Vegetables
9) Baked Goods
10) Sauces, Dressings, and Condiments

Food Industry by Channels ($ billion)

Consumer-Oriented Food Exports	$63.5
Consumer-Oriented Food Imports	$38.3
Retail Food	$173.6
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 VéGé
8) Gruppo Eurospin
9) Carrefour SA
10) Despar Italia

GDP/Population

Population: 58.9 million
GDP: 2 trillion
GDP per capita: $40,236

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.	Non-tariff barriers, including traceability requirements, can hinder U.S. exports.

Data and Information Sources:
Trade Data Monitor (TDM), LLC; Euromonitor; industry contacts.

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SECTION I. MARKET SUMMARY

Italy’s consumer food service sales have risen consistently over the last three years. Much of this demand can be attributed to Italy’s tourism sector which was at an all-time high in 2024 (up 2.5 percent compared to 2023). Additionally, annual events such as the Jubilee in 2025 and the Winter Olympics in 2026 are expected to keep this sector growing for the near future.

Inflation and economic uncertainty in 2022 and 2023 forced many Italians to reduce their discretionary spending and focus on primary need expenditures. In 2024, inflation stabilize and the economic climate gradually improved prompting a return to restaurant and hotel dining. In this context, Italy’s food service industry adopted strategies to operate in a tight economy by offering attractive promotions, improving their menu options and dining experience, and catering to consumers with specific health and dietary needs (e.g. celiac, vegan, and vegetarian). Furthermore, restaurant and hotel dining are centerpieces among Italian consumers and tourists alike who utilize the experience as a form of entertainment and a way to socialize. Separately, quick and convenient food and beverage options have furthered Italy’s demand for products such as snacks, quick meals, and takeaway hot drinks. Finally, hybrid work models throughout the country have resulted in reduced spending on breakfast and lunch dining but encouraged evening outings for aperitifs and dinner at full-service restaurants, bars, and pubs.

Table 1. Units, Transactions, and Value Sales in Italian Consumer Food service 2019-2024

	2019	**2020**	**2021**	**2022**	**2023**	**2024**
Units	291,591	277,119	266,795	264,511	262,785	263,413
Transactions (mn)	8,961	6,199	7,262	8,088	8,376	8,490
EUR millions (current prices)	78,683	50,349	60,891	75,178	82,023	83,431

Source: Euromonitor

Table 2. Consumer Food Service, Independent vs. Chain: Units/Outlets 2024

Outlets	**Independent**	**Chained**	**Total**
Cafés/Bars	115,806	1,907	117,713
Full-Service Restaurants	92,244	1,144	93,388
Limited-Service Restaurants	38,281	4,156	42,437
Self-Service Cafeterias	516	492	1,008
Street Stalls/Kiosks	8,429	438	8,867
Consumer Food Service	**255,276**	**8,137**	**263,413**

Source: Euromonitor

Advantages	Challenges
Italians are becoming more aware of international cuisines.	Strong competition in the Italian food market and many consumers 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.
The tourism industry increases demand for hotel, restaurant, and institutional products.	Competition from similar food products produced in EU countries enter tariff-free.
American food and food products are popular in Italy.	A strong U.S. dollar makes competitive pricing challenging, particularly in specialty foods.
Italian consumers demand quality, innovative, and healthy products.	Adapting products to Italian consumers' tastes and expectations.

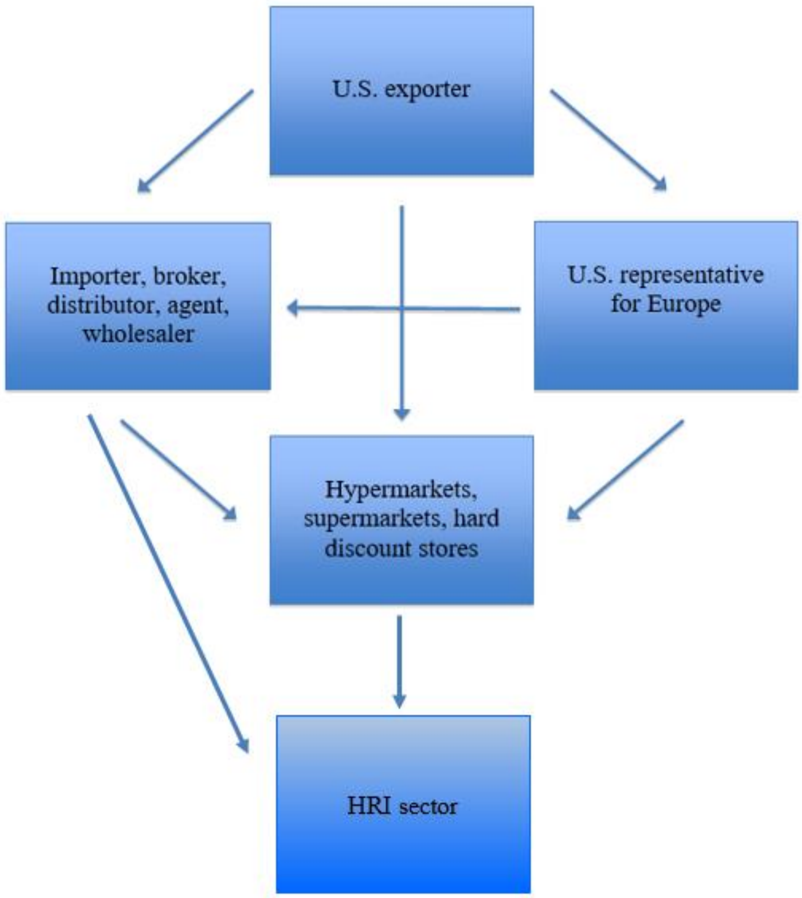
SECTION II. ROAD MAP FOR MARKET ENTRY

- **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. 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.
  - Price is important, although quality and novelty can move some imported products.
  - Be prepared to start small- 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.
  - 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, SIAL, and TUTTOFOOD) offers a good opportunity to meet potential Italian buyers and discuss the market.

- **Market Structure**

  Most imported food products enter the Italian market through brokers or specialized traders. Italian importers are usually small to medium-sized companies, with only a few large-scale operators like those found in northern Europe. Consequently, these companies import on a reduced scale, but often seek a broader range of products. Imported products from North America often enter Italy indirectly from the Netherlands' Port of Rotterdam or directly via air freight.



Purchasing by hotels, restaurants, and institutions (HRI) remains fragmented and competitive in Italy. Restaurants, hotels, and catering companies rely on importers, wholesalers, and food manufacturers, while trattorias and pizzerias purchase directly from large retail food outlets. Most of the processed food and raw material sourcing decisions are made directly by the restaurant chef and/or hotel food purchasing director. Wholesalers are the main customers for fish and seafood products, as they purchase and distribute to numerous small restaurants and hotels.

U.S. exporters work closely with importers and distributors who are best positioned to promote U.S. products within the Italian HRI sector. These groups often have an in-depth knowledge of importing requirements, such as product certification, labeling, and packaging. Also, they typically handle shipping, customs clearance, warehousing, and distribution of products within the country. 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 chance of success in the Italian market.

- **Leading International Chain Hotels and Resorts in Italy**
  - BWH Hotel Group
  - AccorHotels Group
  - Marriott International
  - B&B Hotels
  - Minor Hotels
  - Gruppo Una
  - Hilton Hotels
  - TH Resorts
  - Iti Hotels
  - IHG Hotels

- **Leading Restaurants/Fast Foods in Italy**
  - McDonald's Corporation
  - Autogrill SpA
  - Gruppo Cremonini
  - Cigierre SpA
  - Restaurant Brands International
  - BMV Srl
  - Sebeto SpA
  - AccorHotels Group
  - Gruppo La Piadineria
  - Yum! Brands Inc

SECTION III. COMPETITION

The EU is the main competitor for the United States in consumer-oriented foods destined for Italy. Proximity and price often make European goods more attractive and competitive. American-style fast food chains and fruit and salad bars are gaining popularity in the Italian market. The move towards more convenient dining has led Italian importers to seek out U.S. food products suited for self-service eateries. Italian consumers continue to favor bakery products, dairy products, processed meat and seafood, and snacks. Italian youth are especially interested in lifestyle foods such as American craft beers and salted snacks.

Competition within Italy’s HRI sector will expand with various consumer food service outlets seeking to grow their market footprint. Companies are in a constant state of providing innovative offers, based primarily on quality ingredients, and open to specialize to Italians and visitors seeking gluten-free, vegetarian, and vegan alternatives. Moreover, there is a rising trend towards having butchers and fishmongers integrated into restaurant establishments, serving consumers who want fresh, visually appealing cuisine made from local ingredients. At the same time, restaurants with open kitchens and chef interactions are expected to gain in popularity, as some clients desire more involvement in the preparation and presentation of the meal and seek a complete 360-degree dining experience.

SECTION IV. BEST PRODUCT PROSPECTS

- **Top consumer-oriented products imported from the world**

  - Dairy products (especially cheese; milk and cream; and yogurt)
  - Pork and pork products
  - Beef and beef products
  - Fresh fruits (mainly bananas, kiwis, and avocados)
  - Processed vegetables (mainly potatoes, tomatoes, and frozen vegetables)

- **Top consumer-oriented products imported from the United States**

  - Tree nuts (mainly almonds, pistachios, and walnuts)
  - Distilled spirits (rum and tafia; and whiskies)
  - Beef and beef products
  - Processed vegetables (tomatoes and other vegetable products)
  - Processed fruit (dried prunes and cranberries)

- **Products present in the market which have good sales potential**

  - Tree nuts
  - Distilled spirits
  - Chocolate and cocoa products
  - Bakery goods, cereals, and pasta
  - Sauces, dressings, and condiments
  - Snack items

- **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

- **Products not present in the market because they face significant barriers**

  - Beef, other than that sold through the High Quality Beef Quota
  - Poultry (sanitary procedures – chlorine wash)
  - Processed food products containing genetically engineered (GE) ingredients

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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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