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Report Highlights:

This report offers information for U.S. companies interested in exporting agri-food products to Italy and includes an overview of the country's economic situation, market structure, export requirements, and best product export opportunities.

Market Fact Sheet: Italy

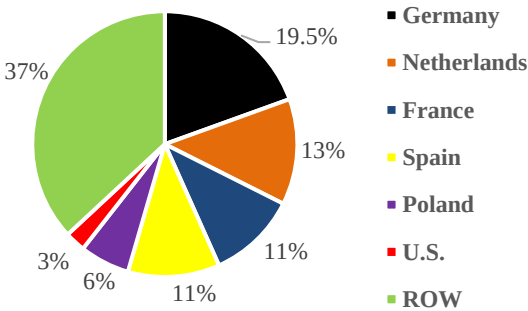
Executive Summary

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.

Imports of Consumer-Oriented Products, 2025



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), contacts, 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

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SECTION I. MARKET OVERVIEW

Among EU-27 Member States, Italy is the fourth largest export destination for U.S. agricultural products, where U.S. sales valued a record \$1.9 billion in 2025.

Italy’s economy is the eighth largest in the world and the third largest in the euro-zone with an estimated GDP of \$2.5 trillion and a per capita GDP of \$43,288 in 2025. As a net agricultural importer, Italy utilizes raw materials and bulk commodities to support its strong food processing and livestock sectors. Annually, nearly half of Italy’s agricultural imports-including those bought from the United States, are destined for processing. In 2025, U.S.-origin food processing ingredients to Italy totaled \$1.4 billion.

United States - Italy Agricultural Trade 2025

U.S. leading exports to Italy	Italian leading exports to the United States
Soybeans: \$609.0 million	Wine: \$2.1 billion
Tree Nuts: \$542.2 million*	Baked Goods, Cereals, and Pasta: \$1.3 billion*
Wheat: \$134.5 million	Olive Oil: \$940.1 million
Corn: \$80.5 million	Condiments and Sauces: \$750.3 million
Seafood: \$67.4 million	Non-Alcoholic Bev. (excl. juice): \$578.9 million*
Total: \$1.9 billion*	Total: \$8.4 billion

Source: BICO

*Denotes highest export/import levels since 1970

Advantages	Challenges
Italy’s large tourism industry increases demand for hotel, restaurant, and institutional products.	Competition from similar EU-produced goods that enter Italy tariff-free.
U.S. style food is popular among the younger generation.	Negative attitude towards foods containing or made from biotech products.
U.S. food products are viewed as “trendy, new, and innovative,” especially those with health benefits.	Limited presence of U.S consumer-oriented products in retail sector.
Italians are becoming more interested in foreign cuisines.	Strong competition in the Italian market and many consumers prefer traditional Italian products.
Exchange rate fluctuations can make imports of U.S. products more competitive.	Mandatory customs duties, sanitary and phytosanitary, and labeling requirements are onerous.

SECTION II. EXPORTER BUSINESS TIPS

- Identify a key importer, broker, distributor, agent, or wholesaler, as they know how to best navigate the import and distribution process. Italian importers are mostly small to medium-sized companies and normally work across several product categories.
- Survey existing and potential opportunities by reviewing [FAS GAIN](#) reports and consider retaining a market research firm to assist in analyzing market opportunities and challenges.
- Price is always important, although quality and novelty alone can move some imported products.
- Be prepared to ship limited volumes when first entering the market. Italians place high importance on building trust within their business relationships.
- Scrutinize the purchasing procedures of the larger retail channels.
- Recognize special EU labeling requirements and consider working through a consolidator or participating in mixed container shipments.
- Highlight product selling points, such as sustainability, organic, plant-based, gluten-free etc.
- Participation in some of the larger European international food trade shows (ANUGA, SIAL, and TUTTOFOOD) which provide a sense of the Italian market and the opportunity to meet Italian importers or distributors.

General Consumer Tastes and Trends

- Dining out remains a popular activity among Italian consumers and tourists alike.
- Hybrid work models have reduced spending on breakfasts and lunches.
- Health and wellness is a major consideration, and younger Italians are more open to global food trends.
- Single-person households are the most common in Italy (37.1 percent of total).
- Aging population: 14.8 million aged over 65 (25.1 percent of population) with 2.5 million over 85 years old (Source- Istat, 2025).
- Demand for convenience in food products is growing with an uptick in the consumption of snacks, quick meals, and takeaway.
- Consumers are becoming more health conscious. Healthy options made their way onto menus and greater attention continued to be paid by food service operators to food intolerances and allergies, as they offered menus dedicated to consumers with specific health and dietary needs.

SECTION III. IMPORT FOOD STANDARDS, REGULATIONS AND PROCEDURES

As a member of the EU, Italy applies “*Community Acquis*”, i.e., the entire body of EU laws and regulations associated with the treaties and international agreements to which the EU is a party. EU Member States share a customs union, a single market in which goods can move freely, a common trade policy, and a common agricultural and fisheries policy. Products imported into Italy must meet all Italian and EU food safety and quality standards, as well as labeling and packaging regulations. Italy’s Ministry of Health is responsible for food safety, while food production falls under the Ministry of Agriculture. Italy’s Ministry of Enterprises and Made in Italy covers standards, labeling, and trade promotion, and the Ministry of Economy and Finance is responsible for customs and duties.

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/#/> and FAIRS reports produced by the U.S. Mission to the EU in Brussels, Belgium that are available at: <https://usda-eu.org/reports/fairs-report/>.

Most imported food products enter the Italian market through brokers or specialized traders. Imported products from North America often enter Italy indirectly from the Port of Rotterdam or via air cargo. Italian importers and distributors have an in-depth knowledge of import requirements, such as product certification, labeling, and packaging. They also typically handle shipping, customs clearance, warehousing, distribution, and occasionally promotion. American exporters who can assist in consolidating shipments from other U.S. sources or have a wide range of products for export have a greater chance for success in the Italian market.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Italian Food Processing Ingredients Sector

Italy’s food processing industry is highly fragmented with more than 55,000 enterprises operating in the market. Roughly half of Italy’s annual agricultural imports are destined for food processing. In 2025, U.S. food ingredient exports to Italy were \$1.4 billion. Italy depends on imports of raw agricultural products for its food processing sector, most of which are sourced from other EU countries. Principal ingredient imports include dairy, meat products, and wheat for pasta. For additional information, see *Italy Food Processing Ingredients 2026* report at: <https://gain.fas.usda.gov/#/>

Italian Food Retail Sector

The Italian retail food market is diverse. Hypermarkets, supermarkets, convenience, discount, and specialized stores coexist with traditional corner shops and open-air markets. The majority of supermarkets are located in northern Italy, followed by the south, and then by the central region. Convenience stores and small supermarkets are commonly located in central areas of towns and cities.

Hypermarkets and supermarkets tend to be positioned within large shopping malls in suburban areas and on the outskirts of cities.

Supermarkets have the highest penetration for retail food sales in Italy which continued to grow in 2025, benefited from stable inflation and the return of increased promotional activity. While e-commerce is growing in Italy, in-store shopping at supermarkets remains the primary method for retail food purchases, especially for consumers over age 50.

Supermarkets in Italy remained moderately concentrated in 2025, with the largest player, CONAD, holding a share of 21 percent, followed by Esselunga with 15 percent and Coop Italia with 11 percent. Multi-channel strategies, blending online and in-store sales, are key to success across the country's retail market. For additional information, see *Italy Retail Foods 2025* report at: <https://gain.fas.usda.gov/#/>

Italian Food Service – Hotel, Restaurant, Institutional (HRI)

Italy's HRI sector is robust with businesses vying for customer patronage. Individual companies adopt strategies to increase competitiveness such as 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 centerpiece activities among Italian consumers and tourists who utilize the experience as a form of entertainment and way to socialize.

For more information, see *Italy Food Service – Hotel Restaurant Institutional 2025* report at: <https://gain.fas.usda.gov/#/>

➤ **Competitive situation for select imported 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
Coffee	\$4.1 billion	\$8,990	Competition from Brazil, Vietnam, Uganda, and India.	In 2025, Italy's coffee imports increased 50% from the previous year.
Beef and products	\$3.66 billion	\$50.7 million	Competition from other EU countries, mainly Poland, France, and the Netherlands.	Growing consumers' demand. Increased tourism arrivals.
Pork and products	\$3.3 billion	\$121,294	Competition from Germany, Spain, the Netherlands, and Denmark	Growing consumer demand.

Wheat	\$2.98 billion	\$171.7 million	Competition from Canada, Hungary, Romania, and France.	In 2025, Italy's wheat imports increased 5.3% from the previous year. Robust demand for pasta.
Tree nuts	\$2.7 billion	\$675.9 million	Competition from Turkey, Spain, Chile, and Germany.	Growing demand from manufacturers, confectionary, and snack industry.
Bakery goods	\$2.4 billion	\$8.2 million	Competition from other EU countries, mainly Germany, France, Spain, and Belgium.	Growing consumer demand.
Corn	\$1.7 billion	\$62.5 million	Competition from Ukraine, Slovenia Hungary, and Croatia.	Strong demand from feed processing industry.
Soybeans	\$1.06 billion	\$311.9 million	Competition from Brazil and Canada.	Strong demand from feed processing industry.

Source: Trade Data Monitor LLC

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Best consumer-oriented product prospects based on growth trends

Commodity	Total imports, \$ billion, 2025	U.S. market share, 2025	Estimated average annual import growth
Beef and beef products	3.7	1.4%	10%
Tree nuts	2.7	25.2%	15%
Bakery goods, cereals, & pasta	2.4	0.3%	10%
Processed vegetables	2.3	1.3%	5%
Food preparations	1.3	1.2%	5%
Pet food	1.2	0.03%	5%
Distilled spirits	1.0	25.5%	5%

Export Market: *Italy(*)*

Product	Calendar Years (Jan-Dec)					January - April		
	2021	2022	2023	2024	2025	2025	2026	%Chg
Bulk Total.....	440.0	602.6	850.3	762.6	912.6*	233.6	163.4	-30.0
Wheat.....	113.0	136.3	100.8	187.8	134.5	36.3	32.9	-9.4
Corn.....	0.0	17.4	5.2	3.5	80.5	12.7	0.3	-97.4
Coarse Grains (excl. corn).....	0.0	0.0	0.0	0.0	14.9	0.0	10.4	17836
Rice.....	0.0	0.3	0.4	0.4	0.2	0.2	1.0	485.4
Soybeans.....	259.0	371.9	653.6*	495.7	609.0	154.4	91.9	-40.5
Oilseeds (excl. soybean).....	0.0	0.5	0.0	0.0	0.0	0.0	0.0	-
Cotton.....	9.0	7.1	5.5	6.7	4.7	2.1	2.9	38.4
Pulses.....	47.0	53.8	65.0*	55.3	45.1	16.4	12.8	-21.5
Tobacco.....	4.0	6.3	12.0	6.3	15.9	8.4	8.8	4.8
Other Bulk Commodities.....	8.0	9.0	7.7	6.9	8.0	3.1	2.3	-26.3
Intermediate Total.....	144.0	136.5	120.5	150.3	128.1	51.1	51.1	-0.1
Milled Grains & Products.....	0.0	0.5	0.6	0.4	0.3	0.2	0.2	-31.1
Soybean Meal.....	21.0	0.1	0.0	33.1	0.0	0.0	0.7	-
Soybean Oil.....	0.0	0.4	0.1	0.0	0.0	0.0	0.0	-
Vegetable Oils (excl. soybean).....	1.0	1.4	2.6	2.0	6.0	5.4	0.6	-89.2
Animal Fats.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Live Animals.....	1.0	1.8	2.0	2.2	2.2	0.6	0.6	-5.0
Hides & Skins.....	17.0	35.9	33.9	10.6	15.9	5.1	4.9	-4.0
Hay.....	0.0	0.2	0.0	0.0	0.0	0.0	0.0	-
Distillers Grains.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Feeds, Meals & Fodders.....	8.0	6.7	8.2	8.1	11.2	4.3	3.1	-27.7
Ethanol (non-bev.).....	4.0	2.0	0.7	1.7	0.2	0.0	4.8*	-
Planting Seeds.....	56.0	43.7	41.8	40.5	41.3	15.9	12.7	-19.8
Sugar, Sweeteners, Bev. Bases..	2.0	2.8	1.3	5.1*	2.1	0.7	3.3	367.2
Dextrins, Peptones, & Proteins.....	2.0	2.5	1.6	1.3	4.6	1.6	0.6	-62.8
Essential Oils.....	7.0	10.0	8.9	13.4	15.4*	6.7	4.9	-27.7
Other Intermediate Products.....	25.0	28.4	18.8	31.8	29.0	10.5	14.8	40.1
Consumer Oriented Total.....	449.0	415.1	473.3	537.7	733.3*	230.4	328.7	42.6
Beef & Beef Products.....	19.0	28.9	40.0	37.5	52.7	13.8	30.3	119.1
Pork & Pork Products.....	1.0	0.2	0.0	0.3	0.0	0.0	0.2	-
Poultry Meat & Prods. (excl. eggs)	0.0	0.6	0.6	0.7	0.4	0.1	0.1	153.8
Meat Products NESOI.....	0.0	0.2	0.0	0.1	0.1	0.0	0.1	61.6
Eggs & Products.....	0.0	0.1	1.0	1.2	5.0*	0.2	4.0	1785.3
Dairy Products.....	1.0	0.9	0.5	0.7	0.5	0.3	0.6	111.8
Fresh Fruit.....	0.0	0.0	0.0	0.1	0.0	0.0	0.0	-
Processed Fruit.....	14.0	19.8	10.4	12.4	11.5	4.3	5.0	18.2
Fresh Vegetables.....	1.0	0.2	0.1	1.2	0.5	0.3	0.3	-11.4
Processed Vegetables.....	22.0	14.4	24.9	51.4	31.2	10.1	10.0	-0.5
Fruit & Vegetable Juices.....	1.0	0.5	0.6	0.7	0.8	0.4	0.2	-49.7
Tree Nuts.....	321.0	276.5	314.9	363.1	542.2*	156.6	240.8	51.8
Confectionery.....	1.0	0.3	0.4	0.2	0.2	0.1	0.0	-43.2
Chocolate & Cocoa Products.....	0.0	0.4	0.4	0.4	0.2	0.0	0.0	-62.8
Bakery Goods, Cereals, & Pasta...	1.0	1.5	1.4	1.0	1.1	0.3	0.4	31.2
Food Preparations.....	16.0*	14.7	14.4	15.1	12.3	4.1	6.5	58.4
Condiments & Sauces.....	3.0	2.4	3.3*	2.7	3.1	1.4	0.9	-34.4
Non-Alcoholic Bev. (excl. juice)....	2.0	2.2	2.4	1.5	2.0	0.6	1.3	98.4
Beer.....	2.0	1.5	1.1	0.8	1.1	0.2	0.1	-63.5
Wine & Related Products.....	2.0	4.1	3.3	3.6	5.0	1.5	3.0	105.0
Distilled Spirits.....	41.0	44.3	48.2	38.4	60.6*	32.8	24.5	-25.2
Nursery Products & Cut Flowers..	1.0	0.2	1.1	0.6	0.9	0.9	0.1	-90.2
Dog & Cat Food.....	1.0	0.8	0.4	1.1	0.7	0.2	0.2	29.4
Other Consumer Oriented.....	0.0	0.6	3.6	2.9	1.2	0.4	0.1	-70.0
Agricultural Related Products.....	147.0	199.9	156.2	129.7	139.5	42.4	43.6	2.9
Biodiesel & Blends > B30.....	0.0	0.0	0.2	0.0	0.0	0.0	0.0	-
Forest Products.....	84.0	115.3	78.8	53.5	72.1	22.3	29.1	30.3
Seafood Products.....	63.0	84.5	77.2	76.2	67.4	20.1	14.6	-27.5
Agricultural Products.....	1,032.0	1,154.3	1,444.0	1,450.6	1,774.1*	515.2	543.2	5.4
Agricultural & Related Products.....	1,180.0	1,354.1	1,600.2	1,580.3	1,913.5*	557.6	586.8	5.3

Prepared By: Trade & Economic Analysis Division/GMA/FAS/USDA

* Denote Highest Export Levels Since at

www.fas.usda.gov/GATS

Source: U.S. Census Bureau Trade Data

Least CY 1970

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 VI. KEY CONTACTS AND FURTHER INFORMATION

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

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

For more detailed U.S. trade statistics, check USDA's Global Agricultural Trade System (GATS):
<https://apps.fas.usda.gov/gats/default.aspx>

Attachments:

No Attachments