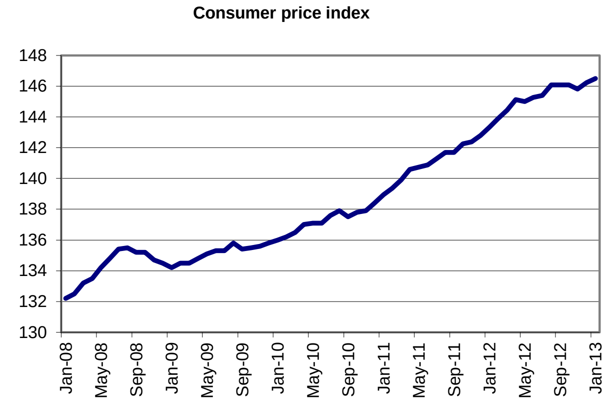
COUNTRY FACT SHEET:

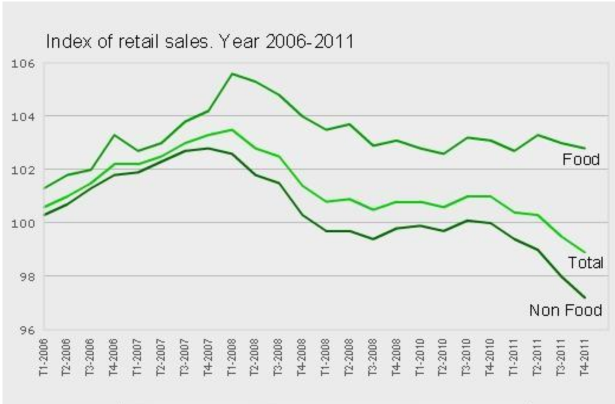
Italy

General information

Capital:	Rome	**Population:**	approx. 60 m (2011)
Surface area:	301,338 square km	**Unemployment rate:**	12% (2012)
Official language(s):	Italian	**Households:**	25.2 m (2011)
Currency:	Euro	**Average household size:**	2.4 people (2011)
Trading language(s):	Italian		

Key macroeconomic indicators





Economic growth	2011	1%
Inflation rate	2011	2.9%
Increase in real earnings	2011	0.5%
Financial deficit of public budgets	2011	-3.9%
Public debt	2011	120.1%

Food industry structure

- Most important industry branches: beverages, dairy sector, confectionery, meat processing.
- Exports are € 24.4 bn; imports € 27.5 bn
- Italian exports are higly concentrated in Europe, 78.2% in 2011.
- The Modern Retail Channel (supermarkets/hypermarkets) accounts for 82.7% of total Food & Drink sales.

Grocery retail structure

- Food & drink sales 2011: € 64 bn
- Italy is the 4° largest grocery market in Europe (after France, UK and Germany)
- The current market share of the top 3 retailers in Italy is only around 35.9%
- Sales shares of main players: COOP (14.9%), CONAD (11.4%), Carrefour (9.6%).
- Number of outlets 2012: 28.891. This includes discounters and drugstores.
- The Superstore (400 - 4.499 mq) with 8822 stores represent 40% of turnover (2011).

FEVIA Vlaanderen Federatie Voedingsindustrie

Compiled by Green Seed Italy, www.greenseedgroup.it

January 2013

Sources: National Institute of Statistics, Nielsen Company,
Italian Federation of the food industry, SymphonyIRI Group.
In collaboration with the Flemish government and Flanders Investment & Trade

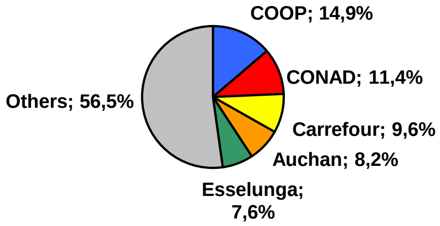
green seed International Food Consulting

COUNTRY FACT SHEET:

Italy

Major grocery retailers

Group	No. of stores	Food turnover, gross (in m EUR)	Market share (%)	Positioning
COOP	1.444	13.100	14.9	Depends on format
CONAD	2937	10.200	11.4	Depends on format
Carrefour	1300	8.650	9.6	Depends on format
Auchan	1600	7.800	8.2	Depends on format
Esselunga	141	6.630	7.6	Depends on format



Foodservice structure

- 3 segments: Non-Commercial, Commercial and Fast-Food
- Commercial includes: Restaurants, Pubs, Hotel and Coffee Bar
- Fast-food includes: Self-service restaurants, Takeaway, Stallholders, Retailers in entertainment places.
- Italy accounts for 23% of spending in Europe with 60 bn.
- Italian distribution is highly uneven; retail chains account for only 16.6%.

Main food shows

- Cibus, Parma; the most important showcase of Italian food products; annually (in early May)
- TuttoFood, Milano; Point of reference for the Italian food & drink sector; biennial (at the end of May)
- RHEX, Rimini; event worldwide leader in HO.RE.CA; annually (at the end of February)

Main trade magazines

- Food; The specialized trade magazine focusing on consumption trends in all major sectors of food and beverages.
- Largo Consumo; The magazine observes the consumer goods market, with particular attention to product integration and multi-channel.
- MarkUP; Monthly magazine of Economics, Production & Distribution Policy
- Bar Business; Provides monthly all the updates for organizing and managing the work of entrepreneurs in the ho.re.ca field.

Consumer behaviour today & expected food trends

- The private label sector is relatively small in Italy, approaching 20% compared to an EU average of 35%
- The recent recession has tightened consumer spending which has neverthe less had a positive effect on the retail market as more consumers stay home rather than eating out.

EVALUATION OF MARKET AND OPPORTUNITIES

- One of the largest markets in Europe for Food & Drink.
- One of the highest added value markets in the world.
- Ideal market for selected high quality food & drink products.
- Good opportunities for Private Label suppliers
- Large and growing Food Service market
- Already established market for British F&D Exporters (approx £ 500 m). Ex-pat market not yet exploited

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