

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Required Report - public distribution

Date: 12/28/2015

GAIN Report Number: IT1588

Italy

Exporter Guide

2015 Italy Exporter Guide

Approved By:

Christine Sloop

Prepared By:

Dana Biasetti

Report Highlights:

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

Post:
Rome

Author Defined:

Section I. Italian Market Overview

Macro-Economic Situation & Key Demographic Trends

Italy has a diversified industrial economy, divided into a developed industrial north and a less-developed agricultural south, with persistent 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 \$2.148 trillion and it has a per capita GDP of \$35,500. 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.

U.S.-Italian Agricultural Trade

In 2014, U.S. agricultural, fish, and forestry exports to Italy were \$1.4 billion, whereas, U.S. imports from Italy reached \$4.1 billion. The United States exports bulk and intermediary products to Italy, such as wheat, soybeans, hides and skins, hardwood lumber and planting seeds. Quantities exported in a given year can fluctuate widely depending on the internal European feed grain and wheat supply and demand situation as well as external competitive factors with third country suppliers. Products are processed into high value items like cured meats and cheeses, pasta, shoes, and furniture, which are then re-exported to the United States.

Bilateral Ag Trade 2014 (Food, Fish and Forestry)

Total U.S. Exports to Italy: \$1.4 billion

Total U.S Imports from Italy: \$4.1 billion

Leading Products:

Tree nuts: \$276.0 million

Forest products: \$176.5 million

Wheat: \$147.3 million

Soybean Meal: \$103.1 million

Fish products: \$94.1 million

Processed vegetables: \$93.4 million

Beef and beef products: \$74.7 million

Soybeans: \$53.6 million

Wine and Beer: \$1.8 billion

Consumer oriented: \$632.0 million

Vegetable oils: \$578.0 million

Cheese: \$324 million

Snack foods: \$156.3 million

Red meats: \$111.4 million

Forest products: \$99.3 million

Processed fruits & vegetables: \$81.7 million

- Italy is a major food processor and a net agricultural importer
- U.S. exports mostly bulk commodities to Italy.
- Italy exports mainly consumer products to the United States

Agriculture

Agriculture is one of Italy's key economic sectors, accounting for around 2% of GDP. Italy's agriculture is typical of the northern and southern division found within the European Union. The northern part of Italy produces primarily grains, soybeans, meat, and dairy products, while the south specializes in fruits, vegetables, olive oil, wine, and durum wheat. Even though much of its mountainous terrain is unsuitable for farming, approximately 4 percent of the population is employed in farming. Most farms are small, with the average size being only seven hectares. Italy has a diversified industrial economy with roughly the same total and per capita output as France or the United Kingdom. Italian industries, including the food-processing sector, rely heavily on imports of raw materials. Italy is one of the largest agricultural producer and food processors in the European Union (EU).

Italy's major agri-food trading partners are other EU Member States, with France and Germany each accounting for slightly less than a fifth of the total. Italy's leading agri-food exports are wine, pasta, olive oil, cheeses, and fruits and vegetables. The export market drives the Italian food-processing sector. However, exchange rates play a critical role outside the EU. Italy has invested heavily in a "Made in Italy" strategy to build consumer loyalty to weather exchange rate fluctuations. Although products with geographic indications represent only a small fraction of the total value of Italian food production, they play a major role in Italy's national food export marketing strategy to portray its products as 'high quality and Italian'.

Population & Language

Italy has a population of roughly 62 million. Italian is the official language and is spoken in all parts of Italy, although some minority groups in the Alto Adige and Aosta regions speak German and French, respectively. Correspondence with Italian firms, especially for an initial contact, should be in Italian. If a reply comes in English then the subsequent correspondence with the Italian firm can be in English. The use of Italian is not only regarded as a courtesy, but assures prompt attention, and prevents inaccuracies that might arise in translation. Most large commercial firms are able to correspond in various languages in addition to English and Italian, but a business overture or proposal is given more serious attention if written in Italian.

Labor

Unemployment is a regional issue in Italy -- low in the north, high in the south. In 2014, the unemployment rate was 12.8%. Persistent concerns about inadequate infrastructure, corruption, and organized crime have adversely affected investment and job creation in the south. A significant underground economy absorbs a substantial number of people, but they work for low wages and without standard social benefits and protections. Women and youth have a significantly higher rate of unemployment than do men.

Italian Importers

Italian importers are usually small to medium-sized companies, rather than the large, market-dominating types found in northern Europe. Consequently, these companies import smaller volumes and a broader range than their much larger European counterparts do. Most imported food products enter the Italian market through brokers or specialized traders. Price is always important, although quality and novelty alone do move some imported products. Imported products from North America often enter Italy indirectly from the Port of Rotterdam or directly by air. Processed food is primarily distributed through retail grocers, convenience stores and discount grocers.

Advantages and Challenges for U.S. Exporters in Italy

<i>Advantages</i>	<i>Challenges</i>
High consumer interest in new products.	Competition from similar food products produced in other EU countries that enter tariff free.
The tourism industry increases demand for hotel, restaurant, and institutional products.	Price competition is fierce.
U.S. products are viewed as “trendy, new and innovative,” especially those with added benefits of health and lifestyle.	Strong cultural presumptions that Italian food products are superior to those of foreign suppliers.
Growing niche market for ethnic foods. Italians are traveling more, becoming aware of foreign cuisines.	Supermarket and hypermarket shelf space and product placement is expensive. Therefore, relationships with Italian trade contacts and channels of distribution are critical for marketing the product.
Exchange rate fluctuations can affect imports of U.S. products.	Mandatory customs duties, sanitary inspections, and labeling requirements can be onerous.
U.S. fast food chains, theme restaurants, and the food processing industry often request U.S. origin ingredients.	In-grained political opposition to modern biotechnology, which leads distribution chains to avoid GMO products.

Section II. Exporter Business Tips

Trade Regulations, Customs and Standards

As a member of the EU, the Common Agricultural Policy (CAP) governs Italy’s agricultural sector. Similarly, Italy employs the same tariffs and border measures as the other 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. It is important to work with experienced importers, and/or have an agent to work with Italian regulatory authorities to ensure the acceptability of specific products. Personal relationships and language ability are of value when conducting business transactions. It is also advisable for the agent to contact health authorities at the port of entry as

interpretation of health directives may vary from port to port. For more information on Food and Import Requirements, please see Post's latest report at <http://italy.usembassy.gov/agtrade.html>.

Section III. Market Sector Structure and Trends

The Italian Food Retail Sector

Italian retail chain outlets have started to make their own purchasing decisions. Success in introducing your product to the Italian market depends on acquiring local representation and personal contact. The advantages of local representation include up to date market knowledge and guidance on business practices and trade law, sales contacts, and market development expertise. Finding the right Italian agent, distributor, or business partner is, therefore, essential to enter the Italian market. It is usually not effective to rely on agents or distributors in neighboring markets, (since despite the existence of the EU common market), the Italian market remains very individual.

Italy's food and drink market is very mature, and remains relatively unconsolidated, and dominated by medium-sized, privately owned companies. Many Italian consumers have a strong bias towards well-known and long-established brands, making market entry difficult and limiting opportunities for revenue growth. A strong food culture means that Italy has one of the highest levels of per capita spending on food in the world, spending more than 20% of their disposable income on food, beverages, and tobacco. However, over the last decade, consumption has been adversely impacted by both relatively low economic growth and unfavorable demographics.

In Italy, there are about 4.3 million foreign residents and food retail outlets have started to cater to these consumers with more foreign and ethnic foods, but these offerings remain small in the face of traditional Italian cuisine. With Europe's Muslim population growing rapidly, halal butcher shops and restaurants are becoming more commonplace, and there is an increased crossover between Muslim and non-Muslim cuisine. More than 1 million Muslims now live in Italy, and, according to reports, halal foods are making inroads into the local cuisine alongside North African and Middle Eastern spices. Continuing tendencies toward smaller families, later marriages, and an increasing number of women in the workforce are resulting in food retail outlets offering more ready-made, ready-to-serve products and a wider range of products. Italian households still prefer fresh rather than frozen and frozen to canned food, as shopping frequency is greater in Italy than in many other European markets.

The Italian grocery retail sector is one of the most fragmented and least saturated in Western Europe and many of the leading brands exist as networks of smaller companies. On the surface this would suggest there were opportunities for the big global retailers to expand rapidly in the Italian market. However, the current price dynamics make it unlikely that any mainstream international retailers will see the market as a particularly attractive destination for investment now. Most of the supermarkets, hypermarkets, and large shopping malls are mainly located in the North of Italy, while the south continues to lag behind with fewer retail outlets and a still underdeveloped distribution network. Large retailers have started to source products from buying groups who can ensure better deals with suppliers, while some large food retailers have decided to join buying

groups to increase their advantage when dealing with suppliers. Although buying groups are largely the domain of large chain food retailers, independent retailers have started to understand their value. A number of large multinational retailers have either merged or made acquisition agreements with local Italian players to assimilate expertise and navigate strict Italian regulations.

Discount retailers are slowly emerging in the Italian market, but have had to modify their market approach by catering to Italian consumer preferences. Hard discounting in the past has proven not to work in Italy but by modifying their image and offering a mix of branded and private label products they seem to have made inroads with the Italian consumer. Private label products have also seen a surge in acceptance by Italian consumers. Each retailer has begun to offer a variety of private label food products, targeting different types of consumers, especially in the organic or typical regional categories. The two most important foreign retailers currently present in Italy are Carrefour and Auchan. Auchan has chosen to enter the Italian market with various formats; hypermarkets, supermarkets, department stores, variety stores and hardware stores, while Carrefour's formats include hypermarkets, supermarkets and convenience stores, with supermarkets being their best performer. For more information on the Italian Food Retail and Distribution Sector, please see Post's latest report at <http://italy.usembassy.gov/agtrade.html>.

The Italian Hotel and Food Service Industry

Every year more than 48 million tourists visit Italy, making it the world's fourth most attractive tourist destination. The Italian Hotel and Food Service Industry is a lucrative and growing sector (it is the second largest in the world after the United States); however, it is also diverse and fragmented. It is dominated by many small establishments, bed and breakfasts, youth hostels, camping parks, resorts and rural tourism locations belonging to foreign investors.

Most imported food products enter the Italian market through brokers or specialized traders. Imported products from North America often enter Italy indirectly via the Netherlands' Port of Rotterdam or directly by air. Wholesalers are the main customers for fish and seafood products, as they purchase and distribute to numerous small restaurants and hotels. Most of the processed food and raw material sourcing decisions are made directly by the restaurant chef and/or hotel Food Purchasing Director. Restaurants, hotels, and catering companies tend to rely on importers, wholesalers, and food manufacturers, while trattorias and pizzerias purchase directly from large retail food outlets. While there are Category Associations for the Hotel and Food Service sectors, each establishment operates independently when it comes to sourcing decisions.

Changing Italian lifestyles, with more workers now forced to spend their lunch hours outside of the home due to either longer commuting times or shorter lunch breaks, have given a boost to the food service industry. Italy is slowly moving towards trends and lifestyles seen in other European countries, and it is forecast that an increasing number of consumers will eat out during their lunch breaks and possibly also for their evening meals because of their jobs, long working hours and business meetings. Although the trend is toward shorter lunch breaks, it is unlikely that most Italians will eat lunch at their desks. Italians still prefer leaving the office for a quick bite. For more information on the Italian Food Service - Hotel Restaurant Institutional sectors please see Post's latest report at <http://italy.usembassy.gov/agtrade.html>.

Section IV. Best High Value Product Prospects

The consumer food/edible fishery and forestry products that offer the best U.S. export opportunities are as follows:

Product Category	2014 Imports USD\$ Million	5-Yr. Avg. Annual Import % Growth in value (2009-2014)	Import Tariff Rate 2014	Market Attractiveness for USA
Tree Nuts	\$276.0 million	18.6	<p>See at: http://ec.europa.eu/taxation_customs/customs_duties/index_en.htm</p>	The United States is the biggest supplier of tree nuts to Italy. Most tree nuts are used as ingredients by the food processing sector. Almonds are the most important commodity within this category. Further products with good sales potential include pistachios, pecans and walnuts.
Forest Products	\$176.5 million	4.7		The United States is a longstanding supplier of forest products to Italy that are imported mainly for the furniture and building sectors.
Wheat	\$147.3 million	9.5		Local production does not satisfy Italian pasta production demand.
Soybean Meal	\$103.1 million	281.2		Local production does not satisfy Italian feed demand.
Fish products	\$94.1 million	5.8		The Italian market offers lucrative opportunities for fish and seafood products. Fish consumption is growing as consumers associate fishery products with a

				healthy diet. Best prospects for U.S. and seafood exports are salmon, shrimps, crabs, caviar substitutes, cuttle fish and squid, sea urchins catfish and scallops.
Processed vegetables	\$93.4 million	8.3		U.S. exports to Italy are slowly increasing. Those products are mostly used as ingredients by the food processing and canned sectors.
Beef and beef products	\$74.7 million	122.8		Very good opportunities for U.S. high quality beef produced without growth hormones. The EU quota determines the amount allowed.
Soybeans:	\$53.6 million	161.6		Local production does not satisfy Italian feed demand.

Section V. Italian Map, Local Time, Holidays and Key Contacts



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.

Key Contact

USDA FAS Contact in Rome, Italy

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

Webpage: <http://Italy.usembassy.gov/agtrade.html>

E-mail: agrime@fas.usda.gov

Tel: (011) (39) 06 4674 2396

Fax: (011) (39) 06 4788 7008

Appendix A. Key Trade & Demographic Information - Italy 2014

Agricultural, Fish/Forestry Imports from the United States: \$1.4 billion
Consumer Food Imports from the United States: \$408.0 million
Fish and Seafood Imports from the United States: \$94.0 million
Italian Population: 62 million
Total Urban Population: 40 Million
Total Rural Population: 20 Million
Foreign Population: 5 million (approx.)
Gross Domestic Product: \$2.1 trillion
Per Capita Gross Domestic Product: \$35,500
Unemployment Rate: 12.4 percent
Per Capita Food Expenditures (U.S. Dollars) \$2,500
Labor Force: 26 million
Percent of Female Population Employed 48.2 %

Exchange Rate: EURO per U.S. Dollar Average 2014: €0.7489 = \$1.00

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

Appendix B. Consumer Food & Edible Fish Product Exports and Imports

Export Market: *Italy**

Product	Calendar Years (Jan-Dec)					January - September Comparisons		
	2010	2011	2012	2013	2014	2014	2015	%Chg
Bulk Total	217.0	253.2	207.9	335.5	217.5	122.8	230.4	87.6
Wheat.....	144.0	160.6	130.0	215.9*	163.3	87.9	192.5	119.1
Corn.....	0.0	7.6	0.0	0.4	0.0	0.0	0.0	-
Coarse Grains (ex. corn).....	0.0	10.1	0.0	12.5	0.0	0.0	0.0	-
Rice.....	0.0	0.2	0.8	1.0	0.6	0.5	0.3	-34.6
Soybeans.....	36.0	0.7	35.6	54.2	0.1	0.1	0.0	-52.7
Oilseeds (ex. soybean).....	0.0	0.2	0.2	0.0	0.1	0.1	0.0	-92.6
Cotton.....	13.0	37.4	10.6	5.2	5.8	5.0	7.4	49.6
Pulses.....	15.0	26.1	17.6	26.5	29.2*	15.8	21.4	35.3
Tobacco.....	2.0	2.1	1.7	3.6	1.7	0.8	0.0	-99.4
Other Bulk Commodities.....	7.0	8.2	11.4	16.4	16.6	12.6	8.7	-31.1
Intermediate Total	185.0	255.0	196.2	262.1	302.6	178.2	141.0	-20.9
Soybean Meal.....	10.0	8.9	33.7	119.8	125.5	50.5	35.4	-30.0
Soybean Oil.....	0.0	0.2	0.3	0.0	0.0	0.0	0.0	-
Vegetable Oils (ex. soybean).....	17.0	19.0	16.7	13.9	6.6	5.4	3.2	-39.8
Animal Fats.....	0.0	0.1	0.1	0.0	0.0	0.0	0.0	717.2
Live Animals.....	3.0	1.0	0.5	0.4	0.2	0.1	0.0	-85.6
Hides & Skins.....	84.0	125.9*	61.8	59.9	64.2	47.2	39.8	-15.6
Hay.....	0.0	0.0	0.0	0.1	0.3*	0.2	0.1	-61.4
Distillers Grains.....	0.0	3.1	0.0	0.0	0.0	0.0	0.0	-
Feeds & Fodders NESOI.....	3.0	8.6	4.4	5.0	8.1	5.8	5.7	-2.2
Planting Seeds.....	32.0	38.2	39.1	32.5	58.0	37.0	27.1	-26.8
Sugar, Sweeteners, Bev. Bases..	0.0	0.4	0.8	4.7*	1.0	1.0	0.7	-24.2
Other Intermediate Products.....	36.0	49.7*	38.8	25.8	38.4	31.0	28.9	-6.7
Consumer Oriented Total	316.0	365.1	351.8	477.6	555.8*	351.1	310.8	-11.5
Beef & Beef Products.....	32.0	63.4	58.0	68.3	78.4*	58.7	61.8	5.4
Pork & Pork Products.....	5.0	2.2	0.7	1.2	1.1	0.9	0.7	-22.1
Poultry Meat & Prods. (ex. eggs)...	1.0	1.1	0.5	1.3	0.2	0.2	0.1	-51.0
Meat Products NESOI.....	0.0	0.8	0.3	0.2	0.6	0.6	0.3	-46.1
Eggs & Products.....	1.0	0.9	3.2	2.4	2.3	1.9	1.0	-47.1
Dairy Products.....	2.0	1.2	0.9	1.6	1.2	1.0	0.9	-6.3
Fresh Fruit.....	0.0	0.6	0.1	0.1	0.0	0.0	0.0	-15.7
Processed Fruit.....	20.0	14.4	13.2	15.4	14.0	10.2	11.2	9.3
Fresh Vegetables.....	1.0	0.4	0.4	0.3	0.3	0.3	0.1	-50.5
Processed Vegetables.....	37.0	27.4	45.9	72.3	95.0*	71.9	24.9	-65.4
Fruit & Vegetable Juices.....	1.0	3.1*	2.0	2.0	0.8	0.8	0.3	-59.5
Tree Nuts.....	140.0	177.2	164.7	236.3	286.8*	144.3	158.8	10.1
Chocolate & Cocoa Products.....	0.0	0.7	0.2	0.2	0.3	0.3	0.1	-70.7
Snack Foods NESOI.....	4.0	3.9	4.8*	4.0	4.0	3.0	2.4	-21.3
Breakfast Cereals.....	0.0	0.2	0.0	0.0	0.0	0.0	0.0	101.6
Condiments & Sauces.....	2.0	1.9	2.2*	2.1	1.5	1.4	0.6	-59.6
Prepared Food.....	4.0	4.5	5.2	9.6	8.8	7.2	6.9	-3.7
Wine & Beer.....	56.0	49.7	40.1	51.2	53.1	42.9	35.8	-16.6
Non-Alcoholic Bev. (ex. juices)....	5.0	5.9*	2.3	1.7	1.0	0.9	1.2	34.5
Dog & Cat Food.....	4.0	5.0	6.7	7.2	6.5	4.8	3.4	-29.2
Other Consumer Oriented.....	1.0	0.8	0.3	0.2	0.2	0.1	0.4	214.9
Agricultural Related Products	310.0	283.1	220.3	265.6	293.8	216.4	192.7	-11.0
Distilled Spirits.....	33.0	31.8	28.5	25.7	30.3	22.9	20.7	-9.7
Ethanol (non-bev.).....	0.0	0.0	0.0	0.2	0.2	0.2	0.0	-87.2
Biodiesel & Blends > B30.....	0.0	2.1*	0.0	0.0	0.0	0.0	0.0	-
Forest Products.....	189.0	161.4	113.1	159.9	169.1	127.6	113.4	-11.1
Fish Products.....	88.0	87.8	78.7	79.8	94.2*	65.7	58.5	-10.9
Agricultural Products	717.0	873.2	755.9	1,075.1	1,075.5	652.1	682.1	4.6
Agricultural & Related Products	1,027.0	1,156.3	976.2	1,340.7	1,369.7*	868.5	874.8	0.7

Prepared By: Global Policy Analysis Division/OGA/FAS/USDA * Denote Highest Export Levels Since at Least CY 1970 www.fas.usda.gov/GATS
 Source: U.S. Census Bureau Trade Data +Values of \$0.05 million or more are rounded to \$0.1 million 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.

Import Supplier: *Italy(*)

Product	Calendar Years (Jan-Dec)					January - September Comparisons		
	2010	2011	2012	2013	2014	2014	2015	%Chg
Bulk Total	26.0	24.8	28.9	20.8	26.4	20.6	20.4	-0.7
Wheat.....	0.0	0.2	0.2	0.4*	0.3	0.2	0.2	-22.4
Coarse Grains.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-40.4
Rice.....	10.0	14.5	12.3	10.8	15.2*	11.5	12.1	5.0
Tobacco.....	13.0	5.0	8.9	4.4	5.0	4.5	2.8	-37.9
Rubber & Allied Products.....	0.0	0.2	1.0*	0.2	0.3	0.3	0.3	-4.2
Coffee, Unroasted.....	1.0	0.6	2.1	1.1	0.6	0.4	0.4	-
Cocoa Beans.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-76.9
Tea, Incl Herb.....	2.0	3.3	3.7	3.0	4.0	2.9	4.1*	42.7
Raw Beet & Cane Sugar.....	0.0	0.0	0.0	0.1*	0.0	0.0	0.0	-
Other Bulk Commodities.....	1.0	1.0	0.5	0.6	0.9	0.7	0.6	-18.1
Intermediate Total	573.0	615.5	638.6	669.3	685.0	518.4	517.5	-0.2
Tropical Oils.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	149.2
Other Vegetable Oils.....	509.0	544.3	547.5	575.5	559.6	425.0	417.1	-1.9
Feeds & Fodders.....	5.0	3.5	8.0	7.2	10.3*	8.4	5.5	-33.7
Live Animals.....	0.0	0.3	0.4	0.1	0.3	0.2	1.1*	474.8
Hides & Skins.....	0.0	0.4	0.2	0.5	0.3	0.2	0.2	1.8
Planting Seeds.....	5.0	5.9	9.7	9.4	11.5*	8.1	6.0	-25.4
Sugars, Sweeteners, Bev Bases.....	1.0	2.3	1.8	3.2	3.7*	2.8	1.8	-37.8
Essential Oils.....	20.0	18.5	18.4	18.0	30.3*	23.2	19.4	-16.5
Cocoa Paste & Cocoa Butter.....	5.0	5.6	6.4*	5.3	4.6	4.0	3.3	-16.0
Other Intermediate Products.....	28.0	34.7	46.2	50.1	64.4*	46.4	62.9	35.5
Consumer-Oriented	2,339.0	2,746.5	2,831.1	3,056.4	3,309.7*	2,419.4	2,448.5	1.2
Snack Foods.....	114.0	132.0	129.1	150.5	153.3*	102.0	101.2	-0.8
Red Meats, FR/CH/FR.....	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Red Meats, Prep/Pres.....	62.0	71.8	86.7	97.3	114.3*	80.8	86.6	7.2
Cheese.....	277.0	311.5	301.3	309.7	307.4	214.8	217.0	1.0
Other Dairy Products.....	27.0	35.5	44.6*	42.7	42.6	33.5	41.1	22.8
Other Fresh Fruit.....	16.0	23.1	25.9	36.1	48.7*	28.4	25.8	-9.1
Fresh Vegetables.....	1.0	5.5	9.4	8.9	9.8*	2.9	3.5	19.7
Processed Fruit & Vegetables.....	48.0	55.3	66.9	66.7	80.3*	61.0	59.7	-2.1
Fruit & Vegetable Juices.....	10.0	20.9	22.3	29.6	39.5	28.7	40.7	41.7
Tree Nuts.....	9.0	11.6	16.1	17.3	25.9*	16.8	19.3	14.9
Wine and Beer.....	1,311.0	1,549.3	1,537.2	1,669.2	1,759.7*	1,315.4	1,308.2	-0.6
Nursery Products.....	5.0	5.0	5.9	5.7	4.9	3.8	4.7	21.2
Roasted & Instant Coffee.....	47.0	60.0	68.3	71.5	82.0*	55.7	72.0	29.2
Spices.....	3.0*	2.5	1.8	2.3	2.2	1.7	1.4	-16.1
Other Consumer Oriented.....	408.0	462.5	515.4	548.7	639.0*	473.9	467.3	-1.4
Forest Products	71.0	67.4	78.1	89.0	98.3	75.3	73.3	-2.7
Logs and Chips.....	0.0	0.0	0.1	0.0	0.1	0.0	0.2	322.1
Hardwood Lumber.....	1.0	1.9	2.5	2.6	2.6	1.9	2.9	49.7
Softwood and Treated Lumber.....	0.0	0.2	0.1	0.1	0.0	0.0	0.0	-67.0
Panel Products (Incl Plywood).....	22.0	28.3	31.4	32.4	41.5	31.8	32.1	1.0
Other Value-Added Wood Prod.....	48.0	37.0	44.1	54.0	54.1	41.6	38.1	-8.3
Seafood Products	10.0	11.7	12.0*	10.2	9.8	7.0	6.7	-4.2
Shrimp.....	0.0	0.0	0.1	0.0	0.0	0.0	0.0	-
Tuna.....	1.0	1.5	1.4	1.0	1.3	1.0	0.9	-8.2
Lobster.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Edible Fish & Seafood.....	9.0	10.2	10.5*	9.1	8.5	6.0	5.8	-3.4
Agricultural Products	2,939.0	3,386.8	3,498.6	3,746.5	4,021.1*	2,958.4	2,986.4	0.9
Ag, Fish & Forest Prods	3,019.0	3,466.0	3,588.8	3,845.6	4,129.2*	3,040.7	3,066.3	0.8

Prepared By: Global Policy Analysis Division/OGA/FAS/USDA * Denote Highest Import Levels Since at Least CY 1970 www.fas.usda.gov/GATS
 Source: U.S. Census Bureau Trade Data +Values of \$0.05 million or more are rounded to \$0.1 million 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.

