

Mission: 404 Milan
Market: 237 Italy
Key Sub-Sector: Fish, Shellfish and Other Products

Specific Product Opportunities Current Imports (mt)

Cod	31,921
Squid	16,390
Salmon	8,469
Eels	2,853
Lobster	1,646
Clams	332

Cod:

With very little local production, the Italian cod market is dominated by imports, which in 1988 amounted to a total of over 30,000 mt. The major portion of this consisted of preserved codfish, totalling 22,400 mt, including 3,783 mt stockfish, 4,634 mt dried and salted, 8,940 mt of non-dried, salted or in brine, and 4,985 mt salted cod fillets. Imports of frozen cod, on the other hand, amounted to only slightly over 10,000 mt, of which 6,611 mt of whole frozen and 3,369 mt of frozen cod fillets. Frozen cod is the staple of the frozen fish product industry, which has grown slowly but steadily over the past generation despite the Italian market's generally professed preference for Mediterranean species vs. Atlantic species, and for fresh as opposed to frozen products.

Market growth is based on both convenience and quality considerations, the latter being facilitated by strict regulations governing production, handling and sale of quick-frozen products ("prodotti surgelati"), i.e. retail pack frozen products. These regulations require, among other things, that foreign companies wishing to export such products to Italy must obtain special Italian government authorization for their plants. It is generally acknowledged that the official and unofficial quality standards thus required by the Italian market are among the most stringent of any European country. Frozen cod consumption is judged to be about evenly split between the institutional market and the consumer-pack sector, and preferred product forms are either H & G whole or fillets. Other more specialized "surgelati" products are often imported under co-packing arrangements with major Italian distributors.

As opposed to the frozen product, dried and/or salted cod has been known on the Italian market for centuries and, although demand is in slight decline, the product continues to hold