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THE ITALIAN FOOD MAGAZINE
BUYER'S • GUIDE

YEAR 6 - N° 3/4 • MARCH/APRIL 2018
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Alimentaria 2018

Salón Internacional de Alimentación, Bebidas & Food Service
International Food, Drinks & Food Service Exhibition

EDITORIAL

by Angelo Frigerio, managing director

ANIMAL WELFARE: NO MORE GENERIC ALLEGATIONS

The issue of animal welfare has come back under the spotlight due to a campaign conducted by Eurogroup for Animals, European animal advocacy organization representing 54 associations, including LAV, Italian Anti-Vivisection Society. The European organization recently broadcasted through various British media some videos portraying the living conditions of pigs in six livestock farms in the Italian provinces of Brescia, Mantua, and Cremona. Four farms out of six are allegedly suppliers of the meat used in the production of PDO Parma ham.

The videos show animals raised in overcrowded pens, rats and decaying structures, as well as cannibalism among pigs. Scenes we've already seen. These documentaries, however, have a clear limit: allegations are generic, not distinctive. Of course, it doesn't mean that such allegations are false or that all the material collected should be wastes. On the contrary. We can and must continue talking about this issue, but taking into account all the parties involved. One is the Parma Ham Consortium that, in the past, decided not to make any public statement to abstain from encouraging polemics.

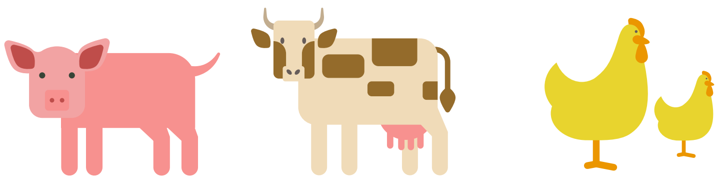
Nevertheless, after the umpteenth attack, the Consortium broke its silence and, in a note, said: "For many years now a defamatory campaign has been carried out against Parma Ham by some animal associations that, systematically and regularly, broadcast shocking images aimed at convincing consumers to stop buying our product."

The Consortium highlights that "none of its 145 associated farmers has ever being accused, denounced or convicted for animal abuse." And it "warmly asks the authors of the videos to make known the names of the livestock farms involved in their inquiry, so that the competent authorities can proceed with their investigations."

In addition, the Consortium stressed that its own task is to control product quality and guarantee the respect of production specifications. Animal welfare, instead, is managed by a national and European regulation. According to it, "the Ministry of Health is in charge of all controls in this field, carried out through the local and national veterinary service."

Finally, the consortium claims that the 'fame' of the brand is widely exploited by the association not to improve animal welfare, "but with the solely purpose of gaining media visibility for its scoops."

All these remarks are true and correct. We should never make generic allegations or generalize a problem. If Eurogroup for Animals is aware of the names of the farmers involved, it should make them known immediately. Concrete and effective measures will be promptly taken to eradicate this problem. Otherwise, this is just propaganda. Useless and counterproductive.



BENESSERE ANIMALE: STOP ALLE DENUNCE GENERICHE

La questione del benessere animale è ritornata sotto i riflettori a causa di una campagna a cura dell'Eurogroup for Animals, Ong che rappresenta 54 associazioni, tra cui la Lega anti vivisezione (Lav). L'organizzazione europea ha diffuso sui media britannici alcuni video relativi alle condizioni dei suini in sei allevamenti, tra le province di Brescia, Mantova e Cremona. Quattro di questi sarebbero destinati alla produzione di prosciutto di Parma Dop.

I filmati mostrano animali ammassati, topi che gironzolano indisturbati, strutture fatiscenti e cannibalismo tra i suini. Scene già note. Questi documenti però hanno un evidente limite: la denuncia è generica e non circostanziata. Ovviamente ciò non significa che le accuse siano false o che si debba buttare al macero il materiale raccolto. Tutt'altro. Si può e si deve continuare a parlarne: ma bisogna farlo coinvolgendo tutti i protagonisti. Uno di questi è il Consorzio del prosciutto di Parma che, negli anni, ha sempre preferito non rilasciare dichiarazioni. Evitando così di rinfocolare le polemiche.

Dopo l'ennesimo attacco, però, il Consorzio ha rotto il suo proverbiale silenzio e ha diramato una nota di fuoco. "Da alcuni anni è in atto una campagna denigratoria e diffamatoria contro il prosciutto di Parma", si legge nel comunicato, "posta in essere da alcune associazioni animaliste che sistematicamente e a intervalli regolari diffondono immagini scioccanti invitando il consumatore a non acquistare più il nostro prodotto".

Il Consorzio ribadisce che "nessuno dei suoi 145 produttori associati è mai stato denunciato o condannato per maltrattamento di animali". E invita "caldamente gli autori delle riprese a rendere noti i nomi e a denunciare immediatamente gli allevamenti coinvolti nella loro indagine in modo da permettere alle Autorità competenti di procedere con i dovuti accertamenti".

Inoltre, sottolinea di avere il compito di vigilare sulla qualità del prodotto e sul rispetto delle norme presenti nel Disciplinare, mentre il benessere animale è regolato da una normativa europea e italiana. Normativa che, com'è noto, "demanda i controlli in questo ambito al ministero della Salute, che li attua attraverso il Servizio veterinario locale e nazionale".

Per finire, il Consorzio fa notare che viene sfruttata la "notorietà" del prodotto non per migliorare le condizioni degli animali, "bensì al solo scopo di ottenere maggiore visibilità mediatica per i propri scoop".

Tutte osservazioni giuste e corrette. Non si può generalizzare un problema o fare accuse generiche. Se Eurogroup for Animals conosce i nomi degli allevatori che li faccia. Saranno prese subito misure concrete per debellare il fenomeno. Altrimenti è pura propaganda. Inutile e controproducente.

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CONTEMPORARY
New products for new consumption.

INSIDE

ITALIAN FOOD BUYER'S GUIDE

THE ITALIAN FOOD MAGAZINE

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NEWS

BREXIT: DUTIES ON ITALIAN EXPORT COULD REACH 2.5 BILLION EURO

The Brexit impact on Italian export could cost 2.5 billion euro, as highlighted by the consulting company Oliver Wyman and the law firm Clifford Chance. Data show that the Italian export to the country is worth about 20 billion euro: England is the third European destination market after Germany and France. The highest costs will be at the expense of consumer goods producers (24% of total value among textile, clothing and electrical appliances) and agri-food companies (16%). According to Oliver Wyman, the smallest companies will suffer more.

Brexit: dazi stimati per 2,5 miliardi di euro sull'export italiano

L'impatto delle barriere post Brexit sull'export italiano potrebbe pesare circa 2,5 miliardi di euro. A presentare questa stima, la società di consulenza Oliver Wyman e lo studio legale Clifford Chance. I dati rilevano che l'export dall'Italia vale circa 20 miliardi di euro, con l'Inghilterra a rappresentare il terzo mercato europeo di sbocco dopo Germania e Francia. I maggiori costi saranno a carico dei produttori di beni di consumo (24% del valore totale, fra tessile, abbigliamento, elettrodomestici) e delle aziende dell'agroalimentare (16%). A soffrire maggiormente, secondo Oliver Wyman, saranno soprattutto le piccole imprese.

TAIWAN: GREEN LIGHT TO ITALIAN SALAMI

After a negotiation lasted more than five years, Taiwan Authority approved pig meat and salami export from Italy, with two missions in Italy by the supervisor of Animal and plant health inspection and quarantine food and drug administration Boureau (Baphiq), the last of which in September. Assica chairman Nicola Levoni claimed: "The bargaining was long and complex, but the Italian Department of Health, the Taipei Ice Agency and the European Commission diligence allowed to reach the long-awaited result."

Taiwan: via libera ai salumi italiani

Dopo una lunga negoziazione durata oltre cinque anni, con ben due missioni in Italia da parte degli ispettori del Bureau of animal and plant health inspection and quarantine food and drug administration (Baphiq), di cui l'ultima in settembre, le Autorità di Taiwan hanno approvato l'esportazione di carni suine e salumi dall'Italia. "La trattativa è stata lunga e complessa ma l'impegno che il ministero della Salute italiano, l'Agenzia Ice di Taipei e la Commissione europea hanno costantemente riservato a questo obiettivo, portato avanti dalla nostra Associazione con forte tenacia, ha consentito di raggiungere il risultato sperato", ha affermato Nicola Levoni, presidente di Assica.

MEXICO: HIGH COURT SENTENCE STRENGTHENS THE RECOGNITION OF ASIAGO AND GORGONZOLA

An important result of the Protection Consortium of Asiago and Gorgonzola cheese for the denomination protection. Mexican High Court rejected the appeal of Us Dairy Export Council and some American companies against the country recognition of both origin denominations concerning the Lisbon Agreement. The decision contributes to include the denominations in the new EU-Mexico agreement, given that from now on their total recognition in the Lisbon agreement can't be contested because of the legal deadlines decay. Asiago and Gorgonzola are part of the 340 origin denominations, of which the EU has asked the recognition in the new global agreement EU-Mexico.

Messico: una sentenza della Corte Suprema rafforza il riconoscimento di Asiago e Gorgonzola

Importante risultato, in Messico, per i Consorzi tutela formaggio Asiago e Gorgonzola in tema di tutela delle due denominazioni. La Corte Suprema messicana ha infatti respinto il ricorso presentato dallo Us Dairy Export Council, insieme ad alcune aziende americane, nei confronti del riconoscimento, nel Paese, delle due denominazioni di origine nell'ambito dell'Accordo di Lisbona. La decisione, di fatto, contribuisce ad aprire la strada all'inclusione delle due Dop nel nuovo accordo Ue-Messico, visto che il loro pieno riconoscimento, nell'ambito dell'Accordo di Lisbona, da oggi in poi non potrà più essere contestato, essendo decaduti i termini legali per farlo. Asiago e Gorgonzola fanno parte della lista delle 340 denominazioni di origine per le quali l'Ue ha chiesto il riconoscimento nell'ambito del nuovo accordo globale Ue-Messico.

FRUIT AND VEGETABLES RECORD EXPORT IN 2017: IT IS WORTH 5 BILLION EURO

New record for the Italian fruit and vegetables export in 2017, that reached almost 5 billion euro, a 3% rise on the previous year. Fruitimprese, the exporters and importers National Association, let it be known, according to the Istat official data. The export amount fell by 6%, at about 4 million tons. The balance slightly exceeded one billion euro, up by 3.2% over 2016. Imports grew up as well, both in volume (+7.4%) and value (+3%). The best performances were recorded by fresh fruit, which represents 57% of total export, as well as legumes and vegetables (27%).

Ortofrutta, export da record nel 2017: vale 5 miliardi di euro

Nuovo record per le esportazioni italiane di ortofrutta nel 2017, che sfiorano i 5 miliardi di euro, in crescita del 3% rispetto al 2016. Lo rende noto Fruitimprese, l'Associazione nazionale degli esportatori/importatori, in base ai dati ufficiali Istat. In calo del 6% i volumi esportati, con circa 4 milioni di tonnellate. Il saldo supera di poco il miliardo di euro, a +3,2% rispetto al 2016. Crescono anche le importazioni, sia a volume (+7,4%) sia a valore (+3%). A segnare le performance migliori sono il comparto della frutta fresca, che rappresenta il 57% dell'export totale, e il comparto legumi e ortaggi (27%).

EUROPEAN AGRICULTURAL EXPORT IS WORTH 138.2 BILLION EURO

From February 2017 to January 2018, EU export reached 138.2 billion euro, increasing by 4.5% on the previous year. In January, it was worth only 10.6 billion euro. This is what emerged from the latest monthly report on EU commercial agriculture, published by the European Commission. Imports are growing too, but the trade balance remains positive. Japan, Brazil, Russia and Morocco, these the more dynamic markets for European exports.

Export agroalimentare europeo a quota 138,2 miliardi di euro

Dal febbraio 2017 al gennaio 2018 l'export Ue è arrivato a quota 138,2 miliardi, con un aumento del 4,5% rispetto all'anno precedente. Nel solo mese di gennaio ha sviluppato 10,6 miliardi di euro. E' quanto emerge dall'ultimo rapporto mensile sul commercio agroalimentare dell'Ue, pubblicato dalla Commissione europea. Crescono anche le importazioni, ma il saldo della bilancia commerciale resta positivo. Questi i mercati più dinamici per l'export europeo: Giappone, Brasile, Russia e Marocco.

WINE EXPORT: NEW ITALIAN COMMERCIAL RECORD IN 2017

Italian wine export closed 2017 exceeding 5.9 billion euro, up 6.2% over the previous 12 months (Istat data). A new record that, nevertheless, could be further increased by Italian wines, at least according to Director General of VeronaFiere, Giovanni Mantovani: "Our quality in the vineyard and in the cellar is growing at a faster pace than our presence on global markets. With Italian exports that remain dangerously anchored on the first three destination countries - the United States, Germany and the United Kingdom - where 53.4% of our sales are made: much more than France and Spain that stand, respectively, at 38.5% and 35.2%".

Export di vino: nuovo record commerciale per l'Italia nel 2017

Il 2017 dell'export di vino italiano si chiude a 5,9 miliardi di euro, per un +6,2% sui 12 mesi precedenti (dati Istat). Un nuovo record commerciale, che tuttavia, ad avviso del direttore generale di Veronafiere, Giovanni Mantovani, non rende ancora giustizia alla qualità delle produzioni made in Italy: "Cresciamo più nella qualità in vigna e in cantina che nel valore sui mercati. Con il nostro export che rimane pericolosamente ancorato sui primi tre Paesi di sbocco (Stati Uniti, Germania e Regno Unito), dove si registra un indice di concentrazione delle nostre vendite del 53,4%: molto più di Francia e Spagna che si fermano rispettivamente al 38,5% e 35,2%".

DENOMINATIONS PROTECTION IN THE INTERNATIONAL AGREEMENTS: ORIGIN EUROPA IS BORN

OriGIn Europa is born. The Protection Consortia wanted the association to improve the PDO and PGI clauses in the bilateral trade agreements signed by the EU. It has a specific demand: to increase the consortia participation to the agreements and if needed, support to the commission negotiators. Introduced on the past weeks in Brussels, the association is part of oriGIn, the global alliance of PDO products' consortia. The vice president of Agriculture Committee Paolo De Castro claims: "The participation of consortia in the agreements is essential, especially in those cases, in which the only possible solution is a compromise."

Tutela delle denominazioni nei trattati internazionali: nasce oriGIn Europa

Nasce oriGIn Europa. L'associazione, voluta dai Consorzi di tutela per migliorare le clausole su Dop e Igp nei trattati commerciali bilaterali siglati dall'Ue, si presenta con una precisa richiesta: aumentare la partecipazione dei consorzi alle trattative, anche a supporto, in caso di necessità, dei negoziatori della commissione. L'associazione, presentata nelle scorse settimane a Bruxelles, fa parte di oriGIn, l'alleanza globale dei consorzi di prodotti a indicazione geografica. "Il coinvolgimento dei consorzi nei negoziati commerciali è di fondamentale importanza, soprattutto in quei casi in cui l'unica soluzione possibile è un compromesso", ha detto nel suo intervento il vicepresidente della commissione Agricoltura, Paolo De Castro.

BRANDZ: TOP 30 MOST VALUABLE ITALIAN BRANDS

Food is widely present in the ranking of the 30 most valuable Italian brands. BrandZ, the largest global brand equity platform covering over 100,000 brands across 45 countries, is released by WPP and Kantar Millward Brown. Luxury brands dominate the Italian market (Gucci ranks 1st at 16.3 billion euro), while Ferrero with Kinder is in 4th place (6.9 billion euro). After fashion and luxury comes the food sector, accounting for 15%: Kinder, Nutella (8th), Ferrero Rocher (11th), but also Barilla (25th), Lavazza (28th), Campari (29th) and Esselunga (30th). Overall, the 30 most valuable Italian brands are worth 85.3 billion euro. The global top 10, instead, is dominated by technology: Google Technology ranks 1st place, Amazon retail ranks 4th and McDonald's occupies 10th place.

BrandZ: la top 30 dei brand italiani di maggior valore

C'è anche il food nella classifica dei 30 brand italiani di maggior valore. La lista di BrandZ, piattaforma globale di brand equity che copre oltre 100mila marchi in 45 paesi, è curata dalla multinazionale Wpp e dall'agenzia di marketing Kantar Millward Brown. I brand del lusso dominano il mercato italiano (Gucci sul primo gradino con 16,3 miliardi di euro), mentre Ferrero con Kinder è al quarto posto (6,9 miliardi). Dopo moda e lusso si classifica proprio il food, per un valore del 15%: Kinder, Nutella (ottava), Ferrero Rocher (11esima), ma anche Barilla (25esima), Lavazza (28esima), Campari (29esima) ed Esselunga (30esima). In totale, i 30 marchi più preziosi d'Italia valgono 85,3 miliardi. Invece, la top 10 nel mondo, dominata dalle tecnologie, vede al primo posto Google Technology, al quarto Amazon retail e al decimo McDonald's.

SPAIN: ITALIANS (CAN) DO IT BETTER

ITALIAN AGRI-FOOD EXPORTS TO THE IBERIAN PENINSULA ARE ON A RISING TREND. BUT THE TRADE BALANCE REMAINS NEGATIVE FOR OUR COUNTRY. INTERVIEW WITH MARCO VERNA, DIRECTOR OF THE ITA OFFICE IN MADRID.

Marco Verna

Total Italian agri-food exports to Spain were worth 1,524 million euro in 2017. Definitely lower than the value generated by Spanish exports to Italy, equal to 5,238 million euro last year. Fruit & veg, as well as cheese, lead the import rank, but the growth potential remains high for our companies, especially for those that will be able to adjust to modern market trends. Namely, healthy and natural food, products for food intolerances, but also matters of public concern such as environmental sustainability and food waste. We talked about that and much more with Marco Verna, director of the ITA office in Madrid.

What was the total revenue generated by Italian agri-food exports to Spain in 2017?

Last year Spanish exports to Italy of food & beverage products were worth 5,238 million euro. While Spanish imports from Italy reached 1,524 million euro. Both trade flows experienced a rising trend in the last 12 months, showing a 5.3% increase in Italian exports and a 14.2% increase in Spanish exports. Italy-Spain trade balance in this sector, however, has always been negative for Italy. The deficit reached 3,714 million euro last year, and Italy accounts for around 4.3% of total Spanish f&b imports, ranking sixth place among supplier countries.

What product categories achieved the best results?

Fruit and vegetables - most of all apples and kiwis - occupy first place in the rank of agri-food products supplied by Italy. Total exports in this sector (both fresh and frozen) generated 1,389 million euro in 2017. Second place is occupied by cheeses: total volumes reached 125.5 million euro last year. Followed by fish products, especially fresh or frozen seafood and shellfish, accounting for 8.3% of our sales. Pasta, olive oil, and wine are also among the Italian products most widespread in Spain.

What's the state of Spanish mass retail market?

Distribution of Fast moving consumer goods (FMCG) is currently facing big changes. According to Asedas - the Spanish Association of Distributors, and Supermarkets, accounting for around 70% of national grocery retail - the basis of a new distribution pattern in the FMCGs market will be strengthened in 2018, and will contribute shaping the society of the future. Topics like energy efficiency, triple bottom line sustainability and social responsibility lie at the core of retailers' development strategies. In order to continue offering consumers the best products at a convenient price.

Origin of raw materials, organic, GMOs free, palm-oil free... these are key issues for consumers in Italy. What about Spain?

45% of Spanish consumers look for healthy food & beverage products during their shopping. Since people in their 30's and even more in their 40's are highly focused on a healthy lifestyle. In addition, food intolerances or allergies are increasingly widespread, and for this very reason gluten- and lactose-free products are highly demanded on the Spanish market. And therefore, they represent an interesting business opportunity.

What should Italian producers willing to export to Spain take into account?

Spain is a country with a large food production that is also highly export-oriented. This strong production capacity is 'forcing' Italian manufacturers to provide some value-added services. Of course, the current economic situation has changed shopping and consumption habits, increasing the importance of price in the decision-making processes and the surge of retail formats like hard discounters.

Price can play an important role for some producers. Nevertheless, there are other key factors to consider: first of all, products able to fulfil current food trends (health, convenience, delight), or in line with modern needs (allergen-free products as well as different sizes, that suggest a greater attention to the big issue of food waste); finally, the fact of being able to adapt to a distribution market driven by supermarkets and hard discount stores. Distribution is focused on improving the shopping experience of its customers. In this sense, synergies between producers, in order to offer a more complete product range, could represent a further key strength.

What could we do, in your opinion, to increase our market share in the country?

In regard to the agri-food sector, where I have a five-year experience on the local market, I noticed a low level of knowledge of our production, and limited to a few products that are often prepared in a not entirely Italian way, but adapted to local habits. It becomes therefore very important to create more culture on our food and wine heritage, in order to increase, in the medium-long term, our sales in the Spanish market.

What should we expect from the 2018 edition of Alimentaria Barcelona?

Alimentaria Barcelona represents, with no doubt, the most important trade fair in the Iberian Peninsula. The participation of Italian companies in the event is an amazing opportunity for those interested not only in the local market, but also in the rest of Europe - in 2016 French, Italian, English, Portuguese and Dutch visitors accounted for 50% of total foreign visitors - as well as in the United States and Latin America, among other countries. Let's not forget that Alimentaria 2016 was attended by over 140,000 visitors, including 44,000 foreigners.

Spagna: si può fare di più

Toccano quota 1.524 milioni di euro le esportazioni agroalimentari italiane verso la Spagna nel 2017. Un valore decisamente inferiore a quello generato dall'export spagnolo verso il Bel Paese: 5.238 milioni di euro. Ortofrutta e formaggi guidano la classifica dei prodotti più esportati, ma i il potenziale di crescita per le aziende italiane rimane elevato. Soprattutto per chi riuscirà a intercettare i moderni trend di consumo. A cominciare dall'ambito salutistico e delle intolleranze alimentari, passando per tematiche particolarmente sentite come la sostenibilità ambientale e lo spreco alimentare. Abbiamo parlato di questo e molto altro con Marco Verna, direttore dell'ufficio Ita-Ice di Madrid.

SPAIN - ITALY TRADE BALANCE (MLN EURO)

	Year	Spanish import from Italy	Var. %	Spanish export to Italy	Var. %	Trade balance (for Italy)
Agri-food (beverage included)	2014	1,160	3.6	4,450	16.4	-3,290
	2015	1,326	14.3	4,550	2.2	-3,224
	2016*	1,430	7.8	4,599	1.1	-3,169
	Q1 2016*	673	9.4**	2,269	-6.1**	-1,596
	Q1 2017*	**723**	**7.4****	**2,846**	**25.4****	**-2,123**
Consumer goods	2014	3,287	9.9	2,490	6.0	797
	2015	3,490	6.2	2,722	9.3	768
	2016*	3,531	1.2	3,056	12.3	475
	Q1 2016*	1,726	1.7**	1,478	11.4**	248
	Q1 2017*	**1,780**	**3.1****	**1,754**	**18.6****	**26**
Industrial and technological items	2014	11,377	5.6	10,476	1.9	901
	2015	12,405	9.0	11,314	8.0	1,091
	2016*	13,097	5.6	12,643	11.7	454
	Q1 2016*	6,594	6.1**	6,412	11.0**	182
	Q1 2017*	**7,624**	**15.6****	**7,091**	**10.6****	**533**
TOTAL	2014	15,824	6.3	17,415	5.9	-1,591
	2015	17,221	8.8	18,586	6.7	-1,365
	2016*	18,059	4.9	20,298	9.2	-2,239
	Q1 2016*	8,993	5.4**	10,159	6.7**	-1,166
	Q1 2017*	**10,128**	**12.6****	**11,691**	**15.1****	**-1,563**

** Provisional data*
*** Variation % over the preceeding year*
Source: Estacom (Foreign trade statistics by ICEX España Exportación e Inversiones).

TOP 30 SPANISH BRANDZ

THE STUDY RANKS THE COUNTRY'S MOST SUCCESSFUL COMPANIES IN 2017, ANALYZES THEIR STRENGTHS, AND IDENTIFIES THE KEY FORCES THAT ARE DRIVING GROWTH IN THIS MARKET.

Low-sugar, low-carbohydrate and fat-free or 'light' products are in demand among both men and women. Organic or 'bio' food is still a niche market in Spain, though gluten-free foods are on the rise.

The Spanish economy is forecast to grow at around 2% a year for the next three years.

In 2016, sales of fast-moving consumer goods in Spain slipped 1.6% by volume and 1.2% by value.

Spain is the birthplace of brands that have become household names the world over: Zara, Mango, Manolo Blahnik, Santander and Telefónica, to name just a handful.

E-commerce already accounts for 1.1% of spending on FMCGs and is used by nearly 4 million Spanish households. Online shopping has been growing at a rate of more than 20% a year.

Spain ranks 19th out of 80 major markets around the world across all measures. Its greatest attribute is its heritage, a rich history and great food.

Span is the 5th largest economy in the EU, and is home to strong and enduring local brands.

Not only is Spanish GDP steady, it's now growing at a rate that outpaces the Eurozone average.

HOW SPANISH GROCERY RETAIL IS CHANGING

As purchasing power has diminished - some estimates say 55% of households struggle to get to the end of the month - private label goods have seen a huge surge in popularity. Lidl has become the fastest-growing supermarket chain in Spain, with nearly 57% of Spanish households having shopped there. While it's still a small player, its market share has grown from 3.5 to 4%. To stay competitive, other retailers, like market leader Mercadona, have been upgrading stores and focusing on quality, particularly of fresh food. As basket size has shrunk, regional stores with more accessible locations have gained ground over out-of-town hypermarkets. Lower prices at supermarkets have led many consumers to switch from small, individual stores to the modern retail trade.

1 ZARA
Category: Apparel
Total Brand Value: $25,135 million
Brand Contribution Index: 4

2 movistar
Category: Telecom Providers
Total Brand Value: $22,002 million
Brand Contribution Index: 3

3 Santander
Category: Banks
Total Brand Value: $8,756 million
Brand Contribution Index: 3

4 BBVA
Category: Banks
Total Brand Value: $7,897 million
Brand Contribution Index: 4

5 IBERDROLA
Category: Energy
Total Brand Value: $5,322 million
Brand Contribution Index: 3

6 endesa
Category: Energy
Total Brand Value: $4,952 million
Brand Contribution Index: 3

7 gasNatural fenosa
Category: Energy
Total Brand Value: $4,365 million
Brand Contribution Index: 3

8 Massimo Dutti
Category: Apparel
Total Brand Value: $2,831 million
Brand Contribution Index: 4

9 REPSOL
Category: Oil & Gas
Total Brand Value: $2,538 million
Brand Contribution Index: 1

10 Stradivarius
Category: Apparel
Total Brand Value: $2,051 million
Brand Contribution Index: 3

11 MERCADONA
Category: Retail
Total Brand Value: $1,900 million
Brand Contribution Index: 3

12 Bershka
Category: Apparel
Total Brand Value: $1,851 million
Brand Contribution Index: 2

13 PULL&BEAR
Category: Apparel
Total Brand Value: $1,700 million
Brand Contribution Index: 3

14 El Corte Inglés
Category: Retail
Total Brand Value: $1,583 million
Brand Contribution Index: 4

15 CaixaBank
Category: Banks
Total Brand Value: $1,220 million
Brand Contribution Index: 2

16 MANGO
Category: Apparel
Total Brand Value: $1,190 million
Brand Contribution Index: 4

17 Bankia
Category: Banks
Total Brand Value: $1,072 million
Brand Contribution Index: 3

18 MAPFRE
Category: Insurance
Total Brand Value: $868 million
Brand Contribution Index: 4

19 Dia
Category: Retail
Total Brand Value: $763 million
Brand Contribution Index: 2

20 Catalana Occidente
Category: Insurance
Total Brand Value: $756 million
Brand Contribution Index: 3

21 Mahou
Category: Beer
Total Brand Value: $685 million
Brand Contribution Index: 5

22 Cruzcampo
Category: Beer
Total Brand Value: $659 million
Brand Contribution Index: 5

23 TELECINCO
Category: Entertainment
Total Brand Value: $607 million
Brand Contribution Index: 4

24 Sabadell
Category: Banks
Total Brand Value: $474 million
Brand Contribution Index: 2

25 JAZZTEL
Category: Telecom Providers
Total Brand Value: $430 million
Brand Contribution Index: 2

26 ANTENA 3
Category: Entertainment
Total Brand Value: $386 million
Brand Contribution Index: 4

27 IBERIA
Category: Airlines
Total Brand Value: $362 million
Brand Contribution Index: 3

28 cuatro
Category: Entertainment
Total Brand Value: $296 million
Brand Contribution Index: 4

29 SEAT
Category: Cars
Total Brand Value: $242 million
Brand Contribution Index: 4

30 bankinter.
Category: Banks
Total Brand Value: $209 million
Brand Contribution Index: 1

The combined value of the BrandZ Top 30 Most Valuable Spanish Brands is 103,103 million US dollars.

Source: BrandZ/Kantar Milward Brown

IF THEY LIVE WELL

YOU EAT WELL

PIGS HAVE BEEN RAISED AND REVERED SINCE ANCIENT TIMES. IN CLASSICAL TIMES THEY WERE A SYMBOL OF FERTILITY, AND IN ETRUSCAN MYTHOLOGY THEY WERE SEEN AS AN IMPORTANT EMISSARY OF THE GODS. THE PIG, THEREFORE, IS AN ANIMAL WHOSE VALUE IS STRONGLY ROOTED IN THE ITALIAN CULTURE, AND AS SUCH IS DESERVING OF OUR BOUNDLESS RESPECT.

INDEED, EVEN TODAY OUR WORK AND OUR CUISINE IS CENTRED AROUND THEM, AND EVERY DAY WE WORK TO ENSURE THEIR HEALTH AND WELLBEING. THIS ENABLES US TO GUARANTEE THAT OUR PORK PRODUCTS ARE 100% TRACEABLE—WE KNOW PRECISELY HOW THEY HAVE BEEN RAISED, HOW THEY HAVE LIVED, AND WHAT THEY HAVE EATEN IN EVERY PHASE OF THEIR DEVELOPMENT.

OUR PASSION FOR PIGS IS A CAST-IRON GUARANTEE FOR OUR CLIENTS THAT OUR PRODUCTS WILL ALWAYS BE THE BEST; THE ANIMALS HAVE BEEN REARED AND RAISED IN CONFORMITY TO THE STRICTEST CERTIFICATION STANDARDS, WITH THE AID OF CUTTING-EDGE TECHNOLOGY, TO ENSURE THAT THEY ARE HEALTHY AND HAPPY. THIS MAKES THEIR MEAT TRULY SPECIAL—A TASY DELICACY THAT HEARKENS BACK TO THE ANCIENT ROOTS OF CIVILISATION.

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BRC FOOD CERTIFICATED

IFS Food

¡TE QUIERO... BARCELONA!

FROM APRIL 16 TO 19, THE SPANISH CITY WILL HOST THE TRADE SHOW'S LARGEST EDITION IN RECENT YEARS. UNRIVALED PLATFORM FOR THE F&B AND HOSPITALITY BUSINESS IN THE COUNTRY.

Spain's leading platform for food & beverage professionals will be held from 16 to 19 April at the Gran Vía Fira de Barcelona venue. In 2018, the exhibition will take place alongside Hostelco, the International trade fair for equipment for catering, hospitality and communities, to make the most of the synergies that exist between sectors like hospitality and gastronomy. The collaboration will attract more than 4,500 exhibitors - 27% of them coming from outside of Spain - including 143 Italian companies.

Although Europe continues to be the main region of origin of visitors to the fair (mainly Italy, France, Portugal, the United Kingdom and Germany), a significant increase in the number of representatives from other strategic markets is expected, namely North America, Asia, and Latin America. In order to promote exports, the trade show has increased investment in its Hosted Buyers program, inviting 800 key international buyers. Organizers hope to attract more than 150,000 visitors.

Al via Alimentaria 2018, kermesse n° 1 in Spagna per il f&b
Si terrà dal 16 al 19 aprile, presso il centro congressi Fira Barcelona Gran Via, l'edizione 2018 di Alimentaria. Evento fieristico numero uno, in Spagna, per gli operatori del settore food & beverage e dell'ospitalità professionale, grazie anche alla concomitanza con Hostelco, la kermesse dell'Horeca. Attesi in fiera oltre 4.500 espositori, tra cui 143 aziende italiane, e 150mila visitatori.

PRODUCT PREVIEW

FMV - FELSINEOVEG
www.felsineoveg.com

VEGHIAMO & LUPINS

Product description
Veghiamo is an innovative organic plant-based product range. The entire range is created using natural ingredients, offering delicious high-quality products that meet the increasing demands for health and wellness of the whole family. High in proteins, low in fat, the entire line presents both organic and vegan certifications obtained from the Icea Institute. All products are ideal for all consumers seeking a healthy diet without sacrificing flavour. Six different varieties, available in practical take away trays or bars ideal for the HoReCa channel.
Plus marketing
Organic, vegan, high in proteins, made in Italy.
Packaging details
Deli slices in 90 g take away trays (FSC paper trays). Approx. 2 kg bars.
International certifications
Organic (Icea), Vegan.

Meet us at Alimentaria:
Hall: International Pavilions - Booth: D 435

FRACCARO SPUMADORO
www.fraccarospumadoro.it

ORGANIC VENEZIANA WITH ITALIAN LIMONCELLO LIQUEUR

Product description
Spongy sour dough mixture with the fresh, aromatic fragrance of lemon. The infusion of lemon rinds gives this cake intense aromas and a strong taste. All ingredients from 100% organic agriculture.
Plus marketing
Organic.
Shelf life
6 months.
Packaging details
500 g. Giorgione Line (with avana carton box).
International certifications
Organic (Icea).

Meet us at Alimentaria:
Hall: 2 - Booth: D 429

MASTER
www.gnocchimaster.com; www.mammaemma.it

POTATO MACCARON MAMMA EMMA

Product description
Maccheroni (in the shape) made with fresh potatoes steamed with their own peel.
Plus marketing
Italian product, fast and easy to cook: 3 min. directly in the pan, just add a half cup of water to your favorite sauce.
Shelf life
75 days, min. guaranteed on shelf 60 days.
Packaging details (weight + type of pack)
400 g.
International certifications
IFS, BRC, ISO 22000, Organic (Icea).

Meet us at Alimentaria:
Hall: 2, level 0 - Booth: E 533-5

SARCHIO
www.sarchio.com

WHITE VEGAN BAR WITH POPPY SEEDS AND PINK GRAPEFRUIT

Product description
Organic, gluten-free and certified by the Vegan Society, Sarchio new white chocolate bar has a delicate and fresh taste. Produced with only organic cocoa butter, brown sugar, rice drink and with poppy seeds and pink grapefruit, it is ideal to indulge in a moment of deliciousness with a unique taste. It is part of the new line of Sarchio chocolate bars which counts 10 different flavours: 5 with milk chocolate and 5 vegans including 3 extra dark and two white.
Plus marketing
Organic, gluten free, vegan.
Shelf life
24 months.
Packaging details
80 g pack.
International certifications
CCPB, Spiga barrata, Vegan Society.

Meet us at Alimentaria:
Hall: 1 - Booth: F 669

PASTIFICIO DI BARI TARALL'ORO
www.taralloro.it

ORECCHIETTE SENATORE CAPPELLI

Product description
Durum wheat semolina pasta.
Plus marketing
Organic durum wheat semolina Senatore Cappelli 100% from Apulia, 100% Italian.
Shelf life
30 months. Shelf life at delivery 24 months.
Packaging details
500 g in avana box.
International certifications
BRC, IFS, Kosher, Halal, Reg. CE 834 (Organic.)

Meet us at Alimentaria:
Hall: 2, level 0 - Booth: C 322

TARTUFLANGHE
www.tartuflanghe.com

TRIFULÒT - TARTUFO DOLCE PISTACHIO

Product description
Trifulòt is the first Mini Sweet Truffle, born in 2007 in our chocolate atelier. A coloured and eye-catchy dress designed makes this product unique, exclusive and tailored. A bite of pleasure, perfect for a break in every moment of the day. Available in 16 different flavor: dark, white, dark - no added sugars, white - no added sugars, Matcha Tea, peanuts, pistachio, extra dark, cappuccino, caramel & salt, amaretto, cardamom, peppermint, 'Dulcis Tuber' (with white chocolate and summer truffle), saffron and rose. Pistachio sweet truffle was awarded at the International Chocolate Award in 2015 and 2017 with the Bronze Medal.
Plus marketing
With Premium Pistachio and Guérande Salt.
Shelf life
10 months.
Packaging details
200 g bags or loose.
International certifications
IFS, BRC.

Meet us at Alimentaria:
Hall: 3, level 0 - Booth: D 492

follow

PRODUCT PREVIEW

SALUMIFICIO VITALI
www.salumificiovitali.com

DRY CURED HAM WITHOUT PRESERVATIVES

Product description
The Vitali dry cured ham is cured without using preservatives. The ingredients are just three: pork leg, salt and time.
Plus marketing
No preservatives.
Shelf life
Boneless: 365 days.
Packaging details
Available bone-in, boneless and pre-sliced.
International certifications
BRC, IFS, ISO 22000, ISO 22005.

Meet us at Alimentaria:
Hall: 2, level 0 - Booth: E 533-4

NEGRI
www.negrisrl.it; www.cosciapuro.com

PURO

Product description
Steam-cooked hind leg of pork completely natural. The use of only 100% natural ingredients is key to offering a food product with no added sugar and added polyphosphates, which is also gluten-free and dairy-free. Only with plant-based preservatives and Himalayan salt for sodium content reduced.
Plus marketing
100% natural ingredients, no sugar added, no polyphosphates added, gluten-free, dairy-free.
Shelf life
120 days.
Packaging details
9 kilos for piece, vacuum packed made by aluminium bag.
International certifications
BRC, IFS.

Meet us at Alimentaria:
Hall: 4 - Booth: E 521

FRATELLI PAGANI
www.fratellipagani.it

GUSTOSÌ LINE

Product description
The range of products Gustosì Pagani Chef is characterized by the incredible taste, creaminess and brilliance of its composition that will adapt perfectly to your meats. The classical Italian marinade is made of authentic made in Italy recipes, company control over the entire production process, aromatic and natural products, excellent performance and preservation. Today we are able to offer a wide range of marinades: 16. However, this does not stop our ability and desire to search for new tastes, flavours and perfumes, that can also meet the needs of the consumers.
Plus marketing
Authentic made in Italy recipes; natural products, enriched with olive oil; more brilliance for your meat; rich notes of taste and color; unmatched creaminess; excellent performance and conservation.
Shelf life
1 year.
Packaging details
Bottle with seal of guarantee, 1 kg.
International certifications
BRC, Halal, Kosher, Icea.

Meet us at Alimentaria:
Hall: 5 - Booth: 534 - co-marketing with Fribin company

IDB - INDUSTRIA DOLCIARIA BORSARI
www.idbgroup.it

CUOR DI PANDORO WITH MASCARPONE CHEESE CREAM AND RED FRUITS - RUSTICO LINE

Product description
A name and a registered form for one of the historical delights of Borsari proposed this year in different declinations, from the classic to Gianduia, up to the new specialty of the range. A delicate filling with mascarpone cream and the acidulous contrast of the semi-sweet red fruits originate a particularly tasty combination in this sweet made with a base of pandorata rich in butter.
Plus marketing
100% made in Italy.
Shelf life
240 days.
Packaging details
Hand wrapped 750 g.
International certifications
BRC, No GMO, Rspo 2017, Bohsas 18001.

Meet us at Alimentaria:
Hall: 3 - Booth: B 299

LAGO GROUP
www.lagogroup.it

WAFER POKER 4 X 45 G LEMON

Product description
45 g wafer portion, in a new tasty and fresh flavor.
Plus marketing
The new flavor is an extension line of the current range (hazelnut, cocoa and vanilla). Size and flavours particularly suitable for the Iberian market.
Shelf life
18 months.
Packaging details
4 flow packs in a 180 g box.
International certifications
Halal.

Meet us at Alimentaria:
Hall: 2 - Booth: B 292

WITOR'S
www.witors.it

BIO WITOR'S LOVEFRUIT

Product description
Friut with chocolate coating, 100% organic.
Plus marketing
Organic fruit, organic chocolate, palm oil free, fair trade cocoa, made in Italy.
Shelf life
15 months.
Packaging details
95 g Doypack.

Meet us at Alimentaria:
Hall: 1 - Booth: C 323

CABRE - CASEARIA BRESCIANA
www.cabre.it

LEONESSA

Product description
Hard cheese produced with 100% cow's milk in the traditional copper double bottomed boilers with a medium-long maturation time (14/16 months min). It is characterized by its round, soft flavor, harmonious bouquet and compact, granular consistency.
Plus marketing
Product suitable for vegetarians.
Shelf life
180 days.
Packaging details
Packed both for the Horeca channel (36 kg entire wheel, half, quarter, 1/8) both for retailers and final consumers Kg 2, Kg 1 and 300 g vacuum.
International certifications
IFS, BRC.

Meet us at Alimentaria:
Hall: 4 - Booth: B 246

AZIENDA AGRICOLA GRITTI BRUNO & ALFIO S.S.
www.quattroportoni.it

BLU DI BUFALA

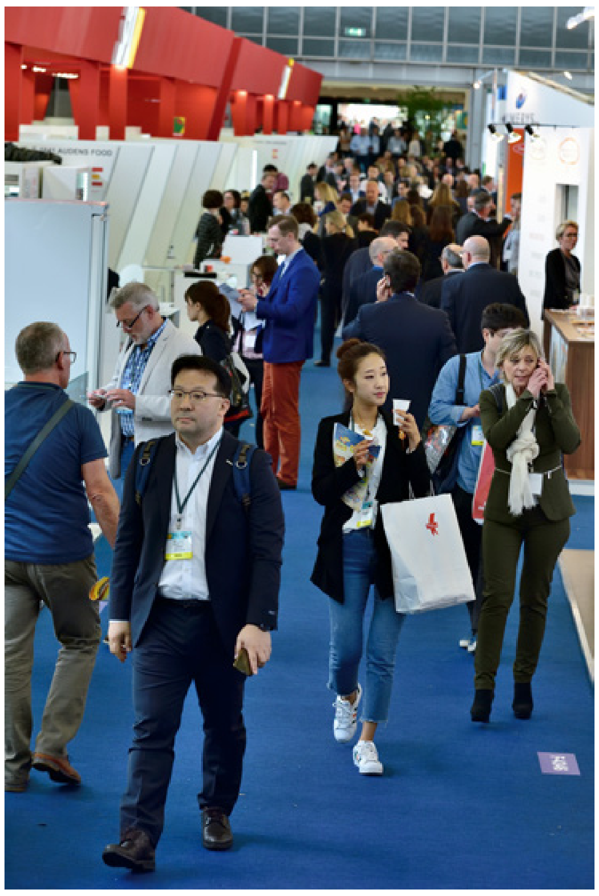
Product description
Blue cheese made by buffalo milk.
Plus marketing
100% buffalo milk, gluten free.
Shelf life
60 days.
Packaging details
Square block of around 4 kg, 2 pieces per pack.
International certifications
Gold Medal at 'World Cheese Awards' in Birmingham in 2013; Gold Medal at 'Mondial du Fromage' in Tours in 2013 ; Silver Medal at 'Mondial du Fromage' in Tours in 2015; Super Gold Medal at 'World Cheese Awards' in London in 2017; Best Italian Cheese at 'World Cheese Awards' in London in 2017.

Meet us at Alimentaria:
Hall: 4 - Interlact - Booth: B 218

end

A WINNING BUSINESS

PLMA'S 2018 'WORLD OF PRIVATE LABEL' IS BACK IN AMSTERDAM ON MAY 29-30. INTERVIEW WITH ITS PRESIDENT, BRIAN SHAROFF.



Private label: un business vincente

Non c'è dubbio. A trainare le vendite e a guidare le decisioni d'acquisto nei punti vendita della Grande distribuzione sono oggi le marche del distributore. Un trend destinato a consolidarsi anche negli anni a venire, grazie a un tasso di crescita annuo che, secondo le stime, si attesta a 10 punti percentuali. Creata più di 30 anni fa, PLMA 'World of Private Label' è diventata un punto di riferimento mondiale per i professionisti del settore. L'edizione 2018 della fiera andrà in scena presso il the RAI Exhibition Centre di Amsterdam, il 29 e il 30 maggio. Intervista a Brian Sharoff, presidente di PLMA.

Private label is driving sales and influencing purchasing behaviors in retail stores worldwide. Its role is set to become increasingly important in the future, with an average yearly growth rate of about 10 percentage points. Established more than 30 years ago, PLMA's annual 'World of Private Label' International Trade Show, organised by the Private Label Manufacturers Association, is the largest event entirely devoted to this business. Number one international platform for retailers, wholesalers and other private label professionals proceeding from around the globe. The 2018 edition will be held at the RAI Exhibition Centre in Amsterdam, The Netherlands, on the 29 and 30 May. Interview with Brian Sharoff, president of PLMA.

What should we expect from PLMA 2018?

We expect more than 4,600 exhibit stands including more than 60 national and regional pavilions with new pavilions from Thailand, Brazil, Peru, Slovakia and Belarus at the show and more than 15,000 visitors from 110 countries.

What kind of innovations will you present, for both visitors and exhibitors?

We invite visitors and exhibitors to come to PLMA's Idea Supermarket, located in the Elicium Hall between Holland and Europa Complex. There they can see more than 60 gondolas of retail products from retailers around the world that feature the latest innovations in product and packaging. There is also the New Product Expo with innovations to be introduced at this year's show by our exhibitors.

What about the trade show's calendar of conferences, seminars and side events?

The show's seminar program is held on Monday, May 28 and will feature presentations from Nielsen with an overview of the latest country-by-country market share data and keynote speaker Justin King, former CEO of Sainsbury's (UK) about winning customer loyalty and building the retailer's brand.

Are exhibitors segmented according to any specific criteria?

The exhibition area covers 14 exhibit halls in the RAI, divided over three main complexes. RAI's Europa Complex is devoted to food products, the Holland Complex has exhibitors displaying non-food products, while Park Complex presents both food and non-food products. Products on display will


Brian Sharoff

include fresh, frozen and refrigerated foods, dry grocery, and beverages as well as non-food categories, including cosmetics, health and beauty, household and kitchen, auto aftercare, garden, and housewares & DIY.

What's the average profile of buyers attending PLMA?

Buyers come to the show from all major supermarkets, hypermarkets, discounters, specialty retailers, drugstore chains, department stores, wholesalers and importers/exporters.

Which is, in your opinion, the role played by Private Label in Europe and worldwide?

Private label has become the driving force of consumer purchasing behavior. Shoppers select their favorite supermarket or store based on its private label. Private label has also pioneered the most innovative products for natural, organic and environmentally-friendly categories.

And what about the future outlook for this business?

The outlook for private label in the future is increasing market share in all European countries as well as in the US. It is expected to grow by 10% next year.

In regard to food & beverage products, what's trending, today, in the global Private Label marketplace?

The trend in food and beverage is based on the changes in eating habits of Millennials. Private label has led the way in offering these consumers the kinds of products they want.

Finally, why should a company decide to exhibit at PLMA?

If a company wants to meet the private label buyers from major supermarkets and retailers, then PLMA's annual show is the best place to do it. That is why the show has an exhibit renewal rate of over 80%.

NEWS FROM THE SECTOR

ALDI AND LEADER PRICE ENTER THE ITALIAN MARKET

Two grocery retailers are entering the Italian market. Aldi Süd opened its first stores on the past February and is looking to open new stores in all regions of Northern Italy as well as in Tuscany. The retailer says that 75% of the food products will be sourced from Italian suppliers. Leader Price discount stores, instead, will be also entering Northern Italy later this year, following an agreement between Italian retailer Crai and Groupe Casino. The network will be run independently from the rest of Crai's operations, and only a limited number of Crai stores will be converted into Leader Price. The assortment will be made for the 80% of Leader Price private label.

IS TESCO LAUNCHING A NEW DISCOUNT FORMAT?

Tesco is reportedly working on a plan to launch its own discount store format in the UK to help it win back customers from Aldi and Lidl. *The Sunday Times* said the new group would match the discounters on price and carry a far more limited range of products than a typical Tesco store. The group is believed to be working with advisers from Boston Consulting on the format. The newspaper added that private label suppliers are being asked to sign non-disclosure agreements before contributing to the project. A separate report by *The Guardian* said Tesco has also been considering a second option, which would involve a Costco-type bulk purchase format, similar to a business the group already operates in Thailand.

Source: PLMA

ITALIAN RETAILER CONAD REVAMPS ITS BRANDS

Conad in Italy is investing 25 million euros to relaunch its private label range this year. Conad CEO Francesco Avanzini said that the retailer will introduce modern packaging and clearer labels, especially for its premium lines, along with new products that meet the growing demand for sustainability. The retailer will launch a brand, called 'Alimentum', which will include gluten-free and lactose-free products. There will also be a new beauty care range under the 'Conad Essentiae' brand as well as a new baby product range. Conad's private label has seen turnover increase by 46% over the last five years, from 2.2 billion in 2012 to 3.2 billion euros in 2017.

LE FAMIGLIE DEL GUSTO: ITALIAN EXCELLENCE GOES GLOBAL

FELSINEO, SAN MICHELE AND F.LLI COATI WORK TOGETHER TO PROMOTE THEIR PRODUCTS WORLDWIDE. A NETWORK MADE OF FAMILY-RUN COMPANIES STRIVING FOR TOP QUALITY AND INNOVATION.

Le Famiglie del Gusto is a company network established in 2017 and based on the collaboration of three leading Italian producers of processed and cured meat for over 50 years: F.lli Coati, Felsineo and San Michele. The continuous search for quality, and the passion as well as the Italian tradition handed down from father to son for generations, have always been theyr key drivers. Every one of these three family-run companies produce a comprehensive range of processed and cured meats, to offer a wide and varied - and therefore highly competitive - product range. In recent times, the offer has been further implemented with new plant-based, organic products. But the greatest value, that is also the strength and the core of the companies' activity, is family.

Salumificio F.lli Coati: top quality cured meats in a four-generation family business

The headquarter, located in Arbizzano Negrar (Verona), is dedicated to the processing of salami, cooked ham, speck, bacon and other deli products. In order to offer the highest standards in regard to supply chain and product quality, a whole facility has been dedicated to the processing and deboning of fresh pork meat. Due to its extreme flexibility and know-how, the company is widely recognized by foodservice operators as well as leading Italian producers and supermarkets chains, where it supplies both branded products and private labels. Salumificio F.lli Coati is exporting to Europe, United Kingdom, Serbia, Lebanon, Japan, Hong Kong, Cuba, Vietnam, Canada and South Korea.

Salumificio San Michele: at the heart of the 'Food Valley'

The history of Salumificio San Michele began over 40 years ago in San Michele Tiorre (Felino), located just outside Parma, at the heart of the Italian 'Food Valley'. The company supplies a wide range of Prosciutto Crudo, Parma Dop and San Daniele Dop, either boned or deboned. The expertise and know-how gained led to the complete integration of all production phases, from deboning to slicing. The Cremonesi family, company founder, is still at the head of Salumificio San Michele and is constantly aimed at maintaining its structure simple and unite, nevertheless able to combine product tradition with the highest innovation also thanks to cutting-edge packaging solutions. The company is able to fully satisfy both domestic and international demands, supplying both branded products as well as private labels. The company exports to Russia, Canada, Argentina, Japan, Korea, Vietnam, Usa, Venezuela and Peru.

Felsineo: leader in mortadella production

Felsineo has been producing exclusively mortadella for over 50 years and is a market leader since the early 90's. The company, founded by the Raimondi family, is today in its third generation and represents a reliable partner for the largest Italian retail chains, to the extent that most of them have chosen Felsineo also for their own private labels. Moreover, it was the first Italian company to produce an authentic '100% natural' mortadella. The certifications gained, together with the constant monitoring of production processes, allowed the company to enter and operate in far-away and complex markets, like the United States of America, Canada and China.

FMV - FelsineoVeg: brand new, 100% organic

Veghiamo includes a range of organic plant-based products created using natural ingredients, able to offer a balanced dietary response that meets the increasing consumer demands for health and wellness. All products are tasty, high-quality, healthy and suitable for the entire family, with a protein content that exceeds 30% and less than 7% of fat. Passion, along with the capacity to observe and understand market evolution, have led to the creation of products reflecting Italian tradition of fine food. All products are developed with utmost care and according to the highest safety standards, and are organic and vegan certified by ICEA (Environmental and Ethical Certification Institute) Consortium. A broad range of whole and sliced products is available.

IN 2018, FAMIGLIE DEL GUSTO WILL BE EXHIBITING AT:

- **Cibus** - Parma 7-10 May. Hall 2 - Booth L048
- **Free From** - Stockholm 16-17 May. Booth D34
- **Plma** - Amsterdam 29-30 May. Hall 1 Europa - Booth F5372
- **Sial** - Paris 21-25 October. Hall 1 - Booth F081-F083

F.lli Coati

Salumificio San Michele

Felsineo

FMV - FelsineoVeg

Le Famiglie del Gusto: eccellenze italiane alla conquista del mondo

Le Famiglie del Gusto è una rete d'impresa nata nel marzo 2017 e basata sulla collaborazione di tre aziende famigliari italiane, specializzate nella produzione di salumi da oltre cinquant'anni: Coati, Felsineo e San Michele. Ogni realtà è specializzata in un prodotto o in una gamma di salumi, per offrire insieme un vasto assortimento altamente competitivo. Il valore aggiunto della gamma proposta è ora arricchito da prodotti biologici vegetali, realizzati con solo ingredienti naturali e senza antibiotici. Ma il valore aggiunto più grande resta la famiglia, che è all'origine di queste straordinarie realtà italiane.

HRC EXPO 2018

INTERNATIONAL EXHIBITION ON
HOTEL, RESTAURANT & CATERING
PRODUCTS, SERVICES, BAKERY EQUIPMENT
AND TECHNOLOGIES

10TH ANNIVERSARY

India FOODEX 2018

.....the largest Food Business show

INTERNATIONAL EXHIBITION ON FOOD & BEVERAGE PRODUCTS, RETAILING, PROCESSING & PACKAGING MACHINERY, FOOD HOSPITALITY AND ALLIED INDUSTRIES.

Other Concurrent Events:

India FOODEX 2018 Culinary CHALLENGE — 2nd Edition

grainTech INDIA 2018 — 9th Edition

DairyTech India 2018 — 8th Edition

31 AUG. - 2 SEPT. 2018

BIEC, Bangalore, India

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TRENDS

THE SWEETS OF TOMORROW

THE MAIN THEME OF ISM 2018, LEADING GLOBAL TRADE SHOW FOR THE SWEETS & SNACK INDUSTRY, WAS 'THE FUTURE'. PERFECTLY PORTRAYED BY THE ORIGINAL AND FUNNY CREATIONS OF THE TH KÖLN INTERNATIONAL SCHOOL OF DESIGN.

Space trips, robots and AI. ISM 2018, leading global trade show for sweets & snacks, held in Cologne from the past 28 to 31 January, gave us a fresh and ironic vision of how the evolution of the confectionery industry could be. According to the theme chosen by the trade fair organizers, namely 'The Future', students at the TH Köln International School of Design (KISD) developed a dedicated installation showcasing 18 brand new creations, that were presented to the over 37,500 visitors and 2,656 exhibitors attending the event.

"Some future scenarios are set in 12 months, others in the year 2500," said professor Jenz Großhans, Köln International School of Design. "They describe the takeover of social media or the rule of robots. Some scenarios seem far-fetched (...and are not always completely serious), others play with current social developments - in the tradition of Thomas Morus, Francis Bacon or Jonathan Swift." Involved were 18 students from 12 nations.

I dolci del futuro

Viaggi spaziali, robot e intelligenza artificiale. L'edizione 2018 di ISM, fiera leader per il settore confectionery, a Colonia dal 28 al 31 gennaio scorsi, ci ha offerto uno spaccato di quella che potrebbe essere l'evoluzione del mondo dolciario. In relazione al tema scelto dagli organizzatori, ossia 'Il futuro', gli studenti della TH Köln International School of Design (KISD) hanno realizzato un'istallazione ad hoc, denominata 'Sweet Future', sviluppata proprio in occasione della kermesse tedesca.

ISM 2018 IN FIGURES:

1,656 suppliers from **73** countries, **86** percent of whom came from abroad, exhibited at ISM 2018 on a **110,000 m² area**. These included 229 exhibitors from Germany and **1,427** exhibitors from abroad. **37,500** trade visitors from 144 countries attended ISM 2018, the foreign proportion was **68%**.

2540 CHOCALYPSE
Gabriela Alvarez Ramirez

"Chocalypse is a spherical chocolate which reminds consumers of the long-forgotten planet Earth. When you open the foil, the planet breaks into pieces, creating a memory of what happened to planet earth after it was destroyed by humans. Today no one knows what's like to live on a planet, but the memory lives on, at least on the candy shelf."

2090 ROBOT IS YOUR FRIEND
Denis Rolf Dunkel

"Robots are friendly beings, and they want to be liked by humans maybe even loved. The figured humans have a fondness they can use to make them sympathize with the nice robots: sweets. They can create cute little gummi robots and put a lot of effort in choosing only the best tastes for humans."

2100 SOFTBYTES
Gilli Levy

"In a world of minimal human connection and artificial intelligence all around us sometimes you miss some social interaction. The SoftBytes candy is made for those moments when you want to make your robot experience emotions. A delicious lollipop for you combined with an electronic plugin for your robot - and you can both enjoy a human moment together."

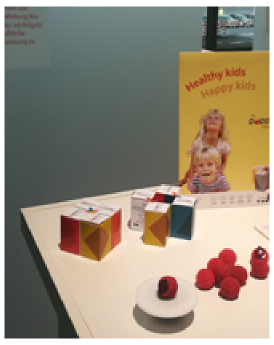
2150 MARS DUST
Marius Kuhl

"'Mars Dust' is a delicious crumbly red candy to be eaten on Mars Day - to celebrate the successful colonization of Mars. The red colour and the sandy consistency make it look like a bag full of Mars sample. It comes with an extra Earth-flag lollipop. By dipping the lollipop into the crumbly red dust you feel the same joy and excitement as the astronauts once felt when putting up the Earth flag on Mars."

2060 WHAT...?
Yuka Ito

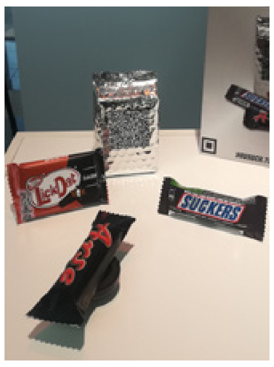
"The package concept of 'What...?' gives an analogue but extended feedback about the content. It has a special texture which is connected to the sweet inside. The packaging arouses the desire to touch and feel, to imagine the sweet with more sense before the purchase. Online shopping is highly convenient, but the body sense is lost. Now you can enjoy shopping with tactile feeling again in real shops."

2040 POPPINS
Eliana Santiago Postigo



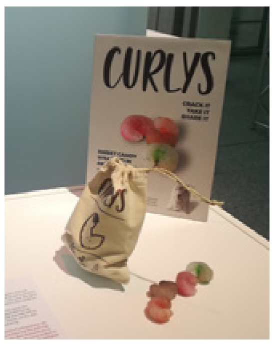
"People worry about their health so much that parents decide to cheat their kids. These sweets indicate whether the child is healthy or not. The liquid filling reacts with the children's saliva, and depending on the colour of the tongues, the overall healthiness is directly indicated. To convey the health benefits, the packaging shows two different sides - where the information for the parents is normally hidden 'Poppins', health camouflage in a sweet, is a must buy for all parents."

2300 YOU SUCK!
Lilla Kalmar



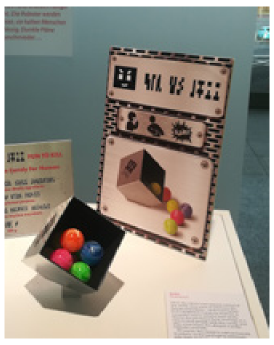
"Where does the word 'humiliate' come from? Of course, from those lame humans! In a word where we, the robots, have control, the few humans are only used to be humiliated. 'You Suck' is the perfect snack that does the trick any time, any place. Just but one, offer it to a puny human and enjoy watching how addiction and desire win over their 'super-intelligent' mind. So pathetic."

2120 CURLYS
Bastian Kloss



"'Curlys' are fresh fruit gums that are made in the skin of real larvae to protect them from drying out. Just pop the larva in the middle and remove the candy for consumption. You can safely throw away the completely biodegradable larval remains. Many small animals will be happy about this snack, so this skin waste will not last long."

2600 ECFH
Ruixiang Li



"Since the robots have gained control of the world, they want to minimize the human population - while having fun. ECFH (Explosion Candy for Humans) is a popular way to achieve their goals. Due to the persistent food shortage, it is easy to feed people with this candy, and after a few hours the alleged 'candy' explodes and kills. Of course, this sweet sold exclusively to robots, so the packaging addresses only their aesthetic preferences."

2020 SWEET SECRETS
Beyza Nur Ermis

"Hardly anything comforts as much as a full-bodied chocolate bar, and hardly anything can stand against this taste and the delicate feeling. Unfortunately, the world can see on every selfie that you have become weak again. That's why there is 'Sweet Secrets'. The augmented reality feature replaces the chocolate bar with the image of a healthy apple, carrot or celery stick on every photo taken with the smartphone. With 'Sweet Secret' every selfie shows exactly what you want to show - not the vile reality."

2170 SOARING SOURS
Matthew Lobb

"Due to our new space station existence being completely vegan, our natural human instinct to hunt and gather is not being satisfied. Enter 'Soaring Sours', a vegan sweet that uses the new atmosphere to create a fun, tasty and indistinctively satisfying experience for the consumer. Once the bottle is opened, the sweets will float out into the atmosphere. In order to eat them you must first capture them with the net provided. Happy Haunting!"

2090 DÉJÀ VIT
Nora Sacca

"'Déjà Vit' (Already experienced) is a sweet which gives the chance to walk down memory lane. Each package contains two chocolate candies with the same, completely unique taste. The first praline should be eaten when a particular important event takes place - enjoy the significant flavors! The second praline can be stored for a long time in a luxurious container, completely pristine and fresh. Many years later, you can re-experience the precious moment by eating the second chocolate, and the unique taste will bring back all the memories."

2180 EXO
Prakash K. Rajendran

"In a world where you cannot control anything, sometimes you want to feel like you are in a complete control of something. 'EXO' can give that feeling too. With this drink you get to develop your own organism in a bottle. 'EXO' works by having an inert mix of liquid nutrients, generic material, and a few more nice things that help the organism, shake well, and drink. Create and destroy at will. Let's play God!"

2025 SYNC
Neal Cameron

"SYNC is a multi sensor sweet experience exploring the relationship between taste and sound. This sharable experience allows you to minimize the potentials of your taste buds with an exciting combination of flavors and sounds. Now you can rediscover the joy you once felt as a child when indulging in a sweet treat."

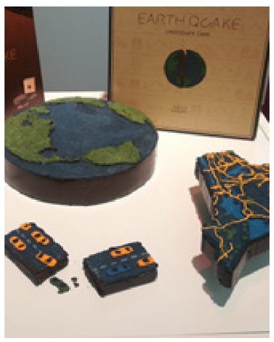
2018 GRAVITATION
Isabelle Dannert

"'Gravitation' is inspired by the phenomenon of the supermassive 'black hole'. This 'black hole' exerts such a strong attraction by neither light nor matter can escape. The biscuit balls are placed one after the other on the spiral track and drawn mercilessly into the 'black hole' of chocolate cream by the force of attraction. They can be eaten with the enclosed 'space sticks'. Complete annihilation has never been so attractive…"

2700 FROOTS
Sanja Alessia Zundorf

"Since all meals have been artificially produced for centuries, our descendants crave nature and organic food. 'Froots' is the attempt to re-produce these legendary fruits… the sweets are made out of a nourishing jelly, infused with the daily recommended dose of vitamis. The product is so popular because it reconnects people with their earth roots, whilst being healthy and tasty at the same time. A 'Froot' a day keeps your sorrows away!"

2500 EARTHQUAKE
Satoshi Tanaka



"Once upon a time, we lived on a planet called 'Earth'. One hateful day, hostile aliens attacked the Earth, occupying metropolitan cities around the world, destroying the infrastructure, the cities and finally the whole planet. Luckily, this is a long, long ago. We have overcome this little inconvenience, and today we enjoy happy chocolate cakes. The EarthQuake comes in three sizes: Highway, City and Earth. You can experience a playful and hazard-free earthquake when breaking the cake."

2030 PRETTYPOO
Anna Tolonen

"The future of extreme vanity where everything is shared and nothing is sacred, we are forced search the feeling of uniqueness in the most simple things of life. Our last resort to stand out from the crowd is our own creation… poop. 'PrettyPoo' is a luxurious delicacy, a carefully balanced mixture of taste, chemistry and gold which leads to a picture perfect outcome. Indulge yourself with PrettyPoo. Gently press out the truffle in chocolate dressing, coated with 24karat gold chip and enjoy afterwards something that so many only can dream of… golden poop."

THE 49TH ISM IS SCHEDULED TO TAKE PLACE FROM 27 TO 30 JANUARY 2019

FOODSERVICE GIANTS

In 2017, the foodservice industry saw the pace of innovation quicker than it has been in decades, forcing every operator to adapt to a world in which technology continually promises to reinvent the restaurant experience. According to the report issued by Euromonitor International and Nation's Restaurant News, retailers have always played an integral role in the International Top 25. In detail, the rank takes into account system-wide sales, corporate revenue, unit metrics and market share statistics.

INTERNATIONAL TOP 25/WORLDWIDE SALES AND UNITS OF LARGEST NON-U.S./CANADIAN FOODSERVICE CHAINS

RANK						SYSTEMWIDE FOODSERVICE SALES* (IN MILLIONS, U.S. DOLLARS)				YEAR-END SYSTEMWIDE UNITS			
2017	2016	CHAIN	HEADQUARTERS	SEGMENT	PARENT COMPANY	2016	2015	2016 VS. 2015	2015 VS. 2014	2016	2015	2016 VS. 2015	2015 VS. 2014
1	1	7-Eleven	Tokyo	C-Store	Seven & I Holdings Co. Ltd.	$18,192.7	$17,080.1	6.51%	7.68%	60,911	57,406	6.11%	6.08%
2	3	FamilyMart [1]	Tokyo	C-Store	FamilyMart Uny Holdings Co. Ltd.	4,491.7	4,244.8	5.82	8.20	18,461	17,360	6.34	3.44
3	2	Lawson	Tokyo	C-Store	Lawson Inc.	4,439.6	4,251.6	4.42	9.43	12,983	12,072	7.55	-1.55
4	4	JD Wetherspoon	Watford, England	Bar/Pub	JD Wetherspoon PLC	2,113.8	2,121.2	-0.35	11.80	755	756	-0.13	-7.58
5	5	Costa Coffee	Dunstable, England	Coffee Shop	Whitbread PLC	2,052.7	1,736.4	18.22	19.93	3,500	3,267	7.13	12.85
6	6	Paris Baguette	Seongnam, South Korea	Limited Service/ Bakery Products	SPC Group	1,809.9	1,707.5	6.00	4.50	3,524	3,355	5.04	2.01
7	10	Sukiya	Tokyo	Limited Service/ Asian	Zensho Holdings Co. Ltd.	1,640.4	1,549.8	5.85	2.65	1,966	1,980	-0.71	-0.15
8	11	Yoshinoya	Tokyo	Limited Service/ Asian	Yoshinoya Holdings Co. Ltd.	1,620.6	1,571.8	3.10	1.22	1,838	1,790	2.68	0.11
9	7	Dicos	Changhua, China	Chicken	Ting Hsin International Group	1,613.3	1,536.5	5.00	8.00	2,376	2,350	1.11	4.44
10	8	Jollibee	Pasig City, Philippines	Limited Service/ Filipino	Jollibee Foods Corp.	1,529.8	1,361.1	12.39	10.98	1,073	986	8.82	7.88
11	9	Ikea Restaurant	Delft, Netherlands	Cafeteria	Inter Ikea Systems B.V.	1,525.0	1,437.8	6.06	5.35	380	368	3.26	3.37
12	19	Gusto	Tokyo	Casual Dining	Skylark Group	1,517.3	1,547.3	-1.94	4.47	1,358	1,389	-2.23	2.66
13	13	Nando's	Johannesburg	Chicken	Nando's Group Holdings Ltd.	1,500.4	1,368.6	9.63	11.39	1,281	1,231	4.06	4.06
14	12	Hotto Motto	Fukuoka, Japan	Delivery/ Takeaway	Plenus Co. Ltd.	1,397.1	1,447.8	-3.50	-2.99	2,655	2,682	-1.01	-1.47
15	15	Akindo Sushiro	Osaka, Japan	Limited Service/ Asian	Akindo Sushiro Co. Ltd.	1,376.9	1,259.1	9.36	4.94	451	417	8.15	6.11
16	18	Saizeriya	Asahi City, Japan	Casual Dining	Saizeriya Co. Ltd.	1,289.4	1,149.8	12.14	1.51	1,312	1,168	12.33	-4.34
17	16	MOS Burger	Tokyo	Limited Service/ Burger	MOS Food Services Inc.	1,221.1	1,191.1	2.52	5.28	1,699	1,706	-0.41	-0.06
18	—	Sunkus	Tokyo	C-Store	FamilyMart Uny Holdings Co. Ltd.	1,200.4	1,298.5	-7.55	-3.24	2,473	2,635	-6.15	-6.49
19	14	Lotteria	Seoul	Limited Service/ Burger	Lotte Group	1,127.3	1,108.6	1.69	-0.68	1,926	1,907	1.00	1.60
20	17	Greggs	Newcastle upon Tyne, England	Limited Service/ Burger	Greggs PLC	1,002.8	966.1	3.80	4.00	1,743	1,698	2.65	1.62
21	—	Mini Stop	Chiba, Japan	C-Store	AEON Group	946.3	886.4	6.76	6.50	5,071	4,942	2.61	7.41
22	24	Uotami	Tokyo	Bar/Pub	Monteroza Co. Ltd.	919.5	895.0	2.74	4.09	739	718	2.92	4.51
23	—	Kura Zushi	Osaka, Japan	Limited Service/ Asian	Kura Corp.	911.9	865.2	5.40	8.15	388	366	6.01	5.17
24	21	Tank & Rast	Bonn, Germany	C-Store	Autobahn Tank & Rast GmbH & Co KG	910.3	890.1	2.27	2.53	445	442	0.68	0.68
25	20	Mister Donut	Osaka, Japan	Limited Service/ Bakery Products	Duskin Co. Ltd.	907.3	$1,013.1	-10.44	-5.83	2,481	2,639	-5.99	-2.15
				TOTALS ($) /AVERAGES (%):		$57,257.5	$54,485.3	4.24%	5.19%	131,789	125,630	2.87%	2.01%
				YEAR-OVER-YEAR CHANGE		5.09%	6.39%			4.90%	3.68%		

** Actual results, estimates or projections. Sales figures are in US dollars, fixed at 2016 exchange rates. Sales figures reflect total price paid by consumers, including value added taxes, where applicable. Sales growth rates reflect change in numbers derived by applying latest-year (2016) US exchange rate across three years of results reported or estimated using other currencies; reported growth rates using period appropriate exchange rates or other-than-US currencies may differ from rates above. Source: Euromonitor International.*
— = New to the roster in 2017. 1 = On Sept. 1, 2016, FamilyMart Co. Ltd. merged with Uny Group Holdings Co., operator of licensed Circle K and proprietary Sunkus convenience-store chains, to create FamilyMart Uny Holdings Co. As of December 2016, 219 Circle K Sunkus stores had been converted to the FamilyMart brand.

EUROMONITOR INTERNATIONAL AND NATION'S RESTAURANT NEWS IDENTIFIED THE MAJOR RESTAURANT CHAINS AROUND THE WORLD IN 2017. THE CONNECTION WITH RETAILERS, AND THE CHINESE DELIVERY 'REVOLUTION'.

Ikea restaurant

The surge of retailers

Overall, the three largest foodservice players outside of the US and Canada are all convenience-store chains, led by 7-Eleven (more than 60,000 global outlets), while home decor giant Ikea booked an estimated 1.5 billion dollars in foodservice sales last year - from fewer than 400 global stores. "Modern retail and foodservice have long gone hand in hand, with dining a core part of the offer at the very earliest department stores and shopping arcades", says the report. "Yet retailers' interest in restaurants and foodservice in general continues to grow, as relentless pressure from online commerce forces a rethink of the entire in-store experience, with dining playing an important role in the ongoing 'reinvention of retail'. It should therefore come as no surprise that many of the most fascinating innovations in the International Top 25 have come from retailers."

China and the 'delivery revolution'

Delivery and digital are booming in the UK, Japan and China, key markets for much of the International Top 25. China, in particular, is experiencing a 'delivery revolution', where heavy digital penetration means delivery is becoming faster and more important than any other market. Not long ago, the only players offering food delivery in China were McDonald's, KFC and Pizza Hut. Internet access and smartphone ownership have increased drastically, however, and domestic e-commerce companies like Alibaba Group Holding and Tencent Holdings have made moves to invest in and consolidate the market for digital-oriented services. Food delivery as a limited, low-tech service was a natural target for investment. Alibaba controls a majority share of the market with the firstand third-largest players, Ele.me and recently acquired Baidu Waimai, while Tencent backs Meituan-Dianping, a food delivery platform seamlessly integrated with its own WeChat and QQ services, which are highly popular social media, messaging and mobile payment platforms.

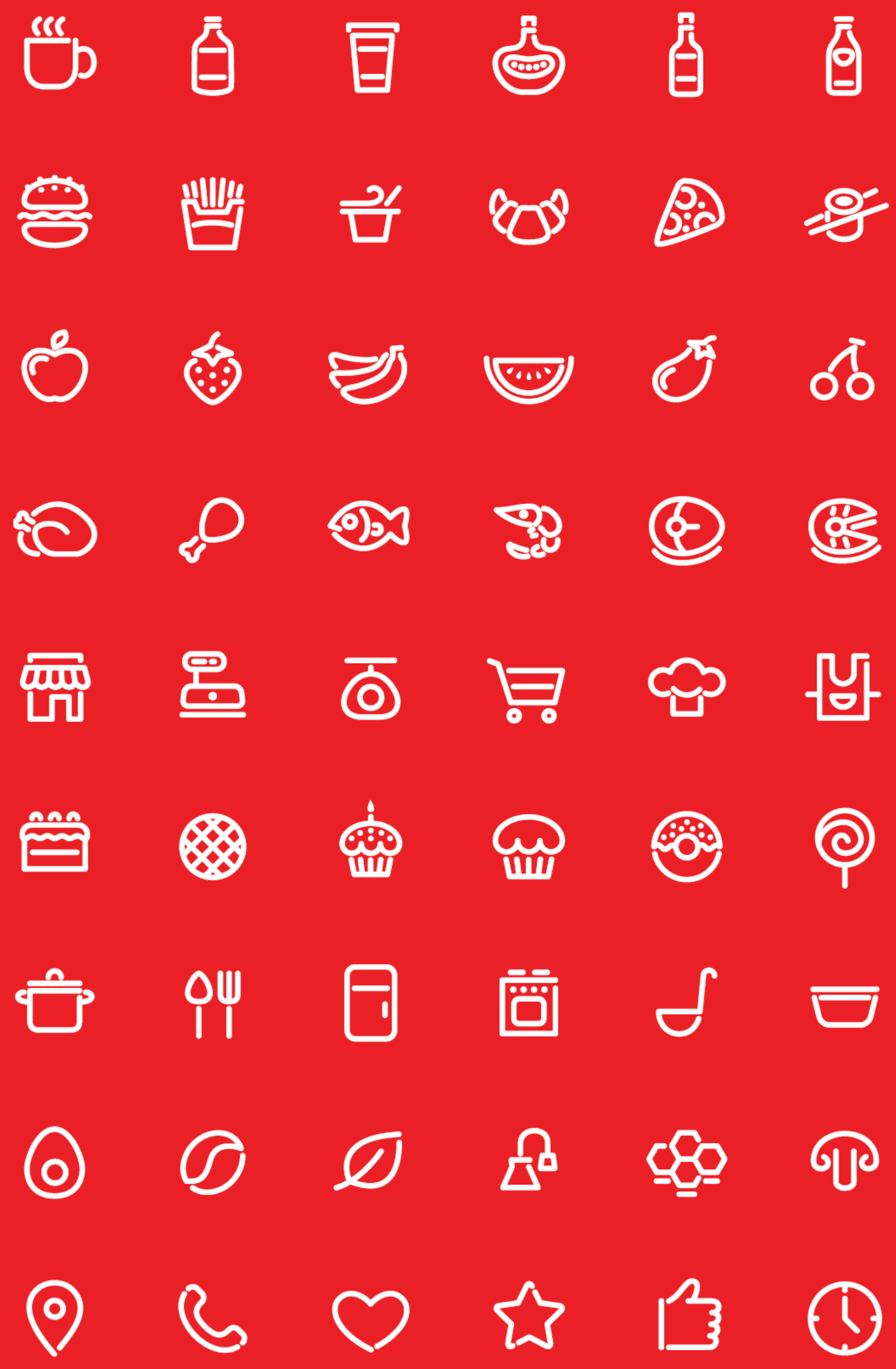
I giganti del foodservice

Cresce e si fortifica il ruolo dei retailer nel segmento della ristorazione. È quanto emerge dalla classifica stilata da Euromonitor International in collaborazione con Nation's Restaurant News, relativa al 2017. Nel dettaglio, il podio è occupato da tre catene di convenience store - 7-Eleven, FamilyMart e Lawson. Ottime performance anche per Ikea, il gigante svedese del mobile, che attraverso il servizio di ristorazione ha generato, nel 2017, 1,5 miliardi di dollari di vendite. Da segnalare la crescita esponenziale del canale 'food delivery' in Cina, controllato dai big Alibaba e Tencent.

GLOBAL FOOD&BEVERAGE MARKET

THE STATE OF THE ART

ASIA PACIFIC, MIDDLE EAST-AFRICA AND LATIN AMERICA ARE EXPECTED TO DRIVE GROWTH. BEVERAGE IS DOMINATING GLOBAL SALES, WHILE SUPER AND HYPERMARKETS SUFFER, DUE TO THE SURGE OF INTERNET RETAILING AND CONVENIENCE STORES.



With a rapidly growing and highly urbanised population, demand across the globe for processed and packaged food and beverages is set to increase. In 2017, the world population stands at 7.47 billion, up from 6.96 billion in 2011. With expected slower growth between 2017-2030, the world population is expected to reach 8.5 billion by 2030. Growth in GDP at 3.5% outstrips population growth of 1% (Cagr 2017-30) but overall consumer spending on f&b is set to drop from 8.5% of GDP to 8.0% by 2030 as products become relatively more affordable and make up a smaller proportion of overall consumer spending. As suggested by a recent market study on the global food and beverage industries commissioned by Dubai World Trade Centre (DWTC), organizers of the Gulfood trade show, to Euromonitor International, independent provider of strategic market research.

Young, under 30 years old, located in urban areas of either Sub-Saharan Africa, Asia Pacific or Latin America is an apt description of the key consumer of the future. This group is the fastest growing and largest contributor to value sales growth with their increasing purchasing power and love of westernised, convenient and easy-to-prepare food and beverages.

Populations in more mature markets - Europe, North America and Australasia - are slow growing and are getting older, with the key consumer of the future most likely to be over 50 years, in a small one-, two- or three-person, city-based household. Some are affluent, others will be living on meagre state pensions but all are looking for health benefits for their bones, mobility, digestive health and energy levels. Their working lives continue longer and they like to treat themselves well, whether it is with organic, locally produced, high-quality fresh or processed products or in the form of indulgent treats.

Food & beverage: lo stato dell'arte del mercato mondiale

Con una popolazione in continua e rapida crescita e un elevato livello di urbanizzazione, la richiesta di alimenti e bevande confezionati è destinata ad aumentare. A livello globale, il valore delle vendite di prodotti f&b ha raggiunto, nel 2016, 1.585 miliardi di dollari, con Asia-Pacifico, America Latina e Medio Oriente-Africa che incidono per il 57% e che traineranno la crescita anche nel prossimo futuro. È quanto evidenzia uno studio commissionato dal Dubai World Trade Centre (DWTC), organizzatore di Gulfood, all'istituto di ricerca Euromonitor International. Tra le categorie merceologiche considerate, a 'dominare' le vendite c'è senza dubbio il mondo del beverage. Sul fronte distributivo, supermercati e ipermercati (con una market share del 55%) si trovano oggi a confrontarsi con format distributivi emergenti, in primis e-commerce e convenience store.

GLOBAL INDUSTRY OVERVIEW

Industry growth per region by category, Cagr 2016-2021

Asia Pacific

Beverages	2.8%
Dairy	4.2%
Poultry	1.3%
Pulses, grains & cereals	3.0%
Fats & oils	4.8%

Australasia

Beverages	1.3%
Dairy	1.1%
Poultry	0.5%
Pulses, grains & cereals	0.8%
Fats & oils	2.4%

Europe

Beverages	1.4%
Dairy	0.6%
Poultry	0.8%
Pulses, grains & cereals	1.0%
Fats & oils	0.5%

Latin America

Beverages	3.2%
Dairy	2.5%
Poultry	2.7%
Pulses, grains & cereals	2.3%
Fats & oils	1.9%

Middle East & North Africa

Beverages	4.2%
Dairy	4.6%
Poultry	5.4%
Pulses, grains & cereals	4.2%
Fats & oils	6.1%

North America

Beverages	1.5%
Dairy	1.7%
Poultry	1.5%
Pulses, grains & cereals	0.7%
Fats & oils	0.7%

Sub-Saharan Africa

Beverages	6.8%
Dairy	3.1%
Poultry	2.9%
Pulses, grains & cereals	4.6%
Fats & oils	2.6%

KEY

The colour of the industries indicates growth rate:

Above global average

Global average

Below global average

Asia Pacific provides scale, but the strongest growth comes from Middle East and Africa

With high birth rates, rapidly expanding cities and growing employment, the combined Middle East and Africa regions offer the highest level of potential growth. With greater distribution of wealth, growing economic and political stability and rapidly developing infrastructure, consumers have greater access to a wider range of foods and beverages. Despite lower growth rates, the sheer size of the population and disposable income growth across Asia Pacific also offers an enticing growth market in all categories.

	Asia Pacific	Australasia	Europe	Latin America	Middle East & North Africa	North America	Sub-Saharan Africa
Total F&B 2011-2016 growth	4.6%	2.0%	1.1%	4.2%	2.4%	0.8%	4.5%
Total F&B 2016-2021 growth	4.6%	2.2%	1.8%	2.6%	2.2%	1.8%	2.0%
Fastest growing retail channel	Internet retailing (38%)	Internet retailing (20%)	Internet retailing (8%)	Internet retailing (5%)	Internet retailing 39%)	Internet retailing (14%)	Internet retailing (33%)
Highest value share ethical label	Environment/ Sustainability (84%)	Environment/ Sustainability (74%)	Environment/ Sustainability (80%)	Environment/ Sustainability (87%)	Kosher (71%)	Environment/ Sustainability (76%)	NA
Highest value share H&W label	Fortified/ Functional (46%)	Naturally Healthy (32%)	Naturally Healthy (48%)	Fortified/ Functional (41%)	Naturally Healthy (53%)	Fortified/ Functional (34%)	Naturally Healthy (52%)

Source: Euromonitor International analysis from Passport

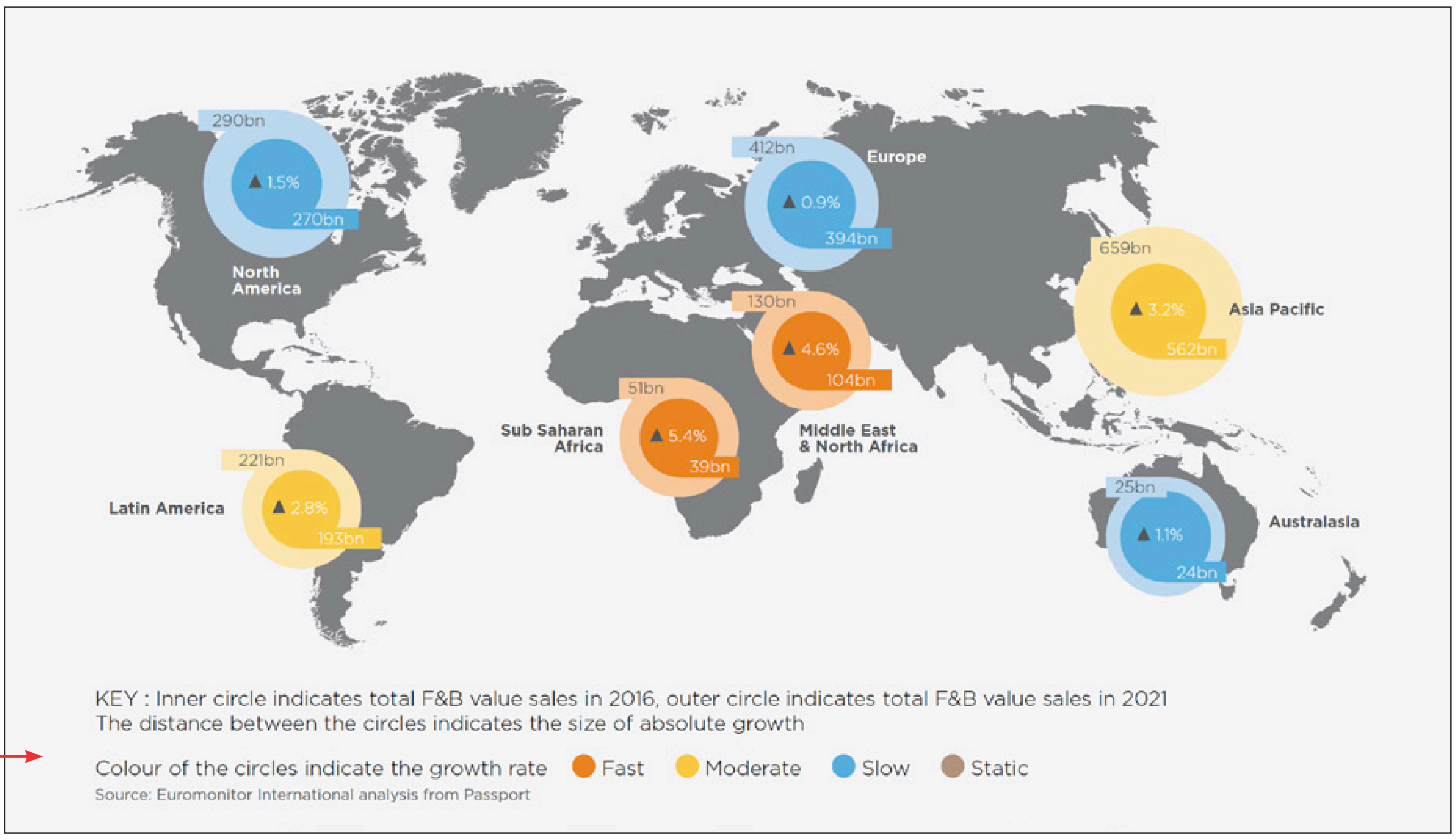
follow

GLOBAL F&B MARKET

Highest growth will come from Asia Pacific, Middle East & Africa and Latin America

Overall retail value of food and beverage sales across the world in 2016 reached 1,585 billion US dollars with Asia Pacific, Latin America and Middle East & Africa accounting for 57% of this value. In 2017, it is forecasted to reach 1,617 US dollars in 2017 and by 2021 total value sales of food and is forecast to reach 1,788 billion US dollars.

Total f&b value sales in 2016, 2021 & Cagr 2016-2021 billion US dollars



Asia Pacific is the most rapidly expanding food and beverage market due to burgeoning populations, higher and more widely distributed disposable income, a growing culture of out-of-home consumption. India is the star performer, surpassing Pakistan, Indonesia and China in terms of forecast growth. Economic expansion, rising incomes and a rapidly expanding middle class has led to increased spending in the last five years and has also supported a shift from unpackaged to packaged foods, the growth of fast food and specialist coffee outlets, a growing interest in naturally healthy foods as well as the expansion of convenience stores.

High disposable incomes, rapid urbanisation and a large and growing group of young consumers comprised of young professionals and families with young children strongly influence food and beverage sales across the Middle East and North Africa, one of the priority regions for major food and beverage companies due to its growth potential. Premiumisation is a growing trend as the number of middle-class and wealthy consumers increases, with many young consumers favouring international brands and consumption through foodservice increasing.

Consolidation in modern retailing is occurring in many smaller countries, such as Colombia and Chile within Latin American, but high penetration in Brazil provides many stores with chilled facilities for stocking fresh dairy, meat and seafood. Consumers are increasingly aware of the health impact of the food they eat, especially in countries such as Mexico, Brazil, Chile and Argentina. Gluten-, sugar- and fat-free foods and sugar-free carbonates are popular with many consumers looking for more naturally healthy alternatives in packaged foods.

In 2017, Europe accounted for 25% of global food and beverage sales. The demand for naturally healthy foods and beverages, increasing label scrutiny and transparent production methods are influencing consumer choices across Europe. Growth in this region will be much slower as consumers look for long-term health gains through diet, replacing the more short-term focus on lower salt, sugar and fat content. The proportion of consumers over 50 years in the total population is also forecast to rise reaching 42% by 2030 up from 37% in 2017. This demographic shift is expected to raise interest in vegetarianism, weight management with fortified foods and healthy snacking and beverages set to increase.

DISTRIBUTION LANDSCAPE

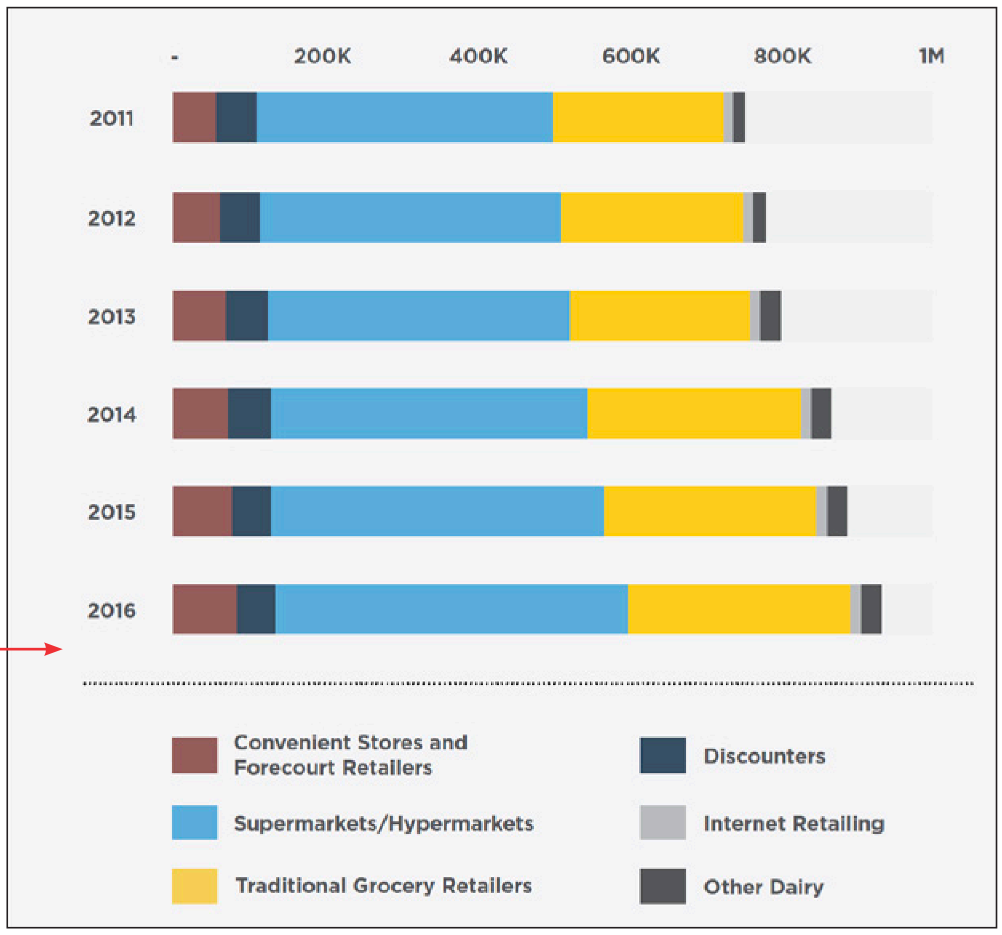
Super/hypermarkets suffer as internet retailing and convenience stores and forecourts expand

Super/hypermarkets now control 55% of total food value sales from 56% in 2011. Convenience stores and forecourts have increased their presence and range of products offered, with market share now reaching 6%, up from 5% in 2011. Although still small, mobile and online purchasing is revolutionising food and beverage purchasing through its integration with rapid and localised delivery systems and is the channel of choice for many younger consumers with global sales share increasing by 1.2% since 2011. For both hot drinks and soft drinks volume, super/hyper markets are the leading channels in 2016 with 47% and 37% shares respectively.

Global food value sales split by key channels, 2011-2016 million US dollars

Note: Channel split excludes dry pulses and semi-processed pulses

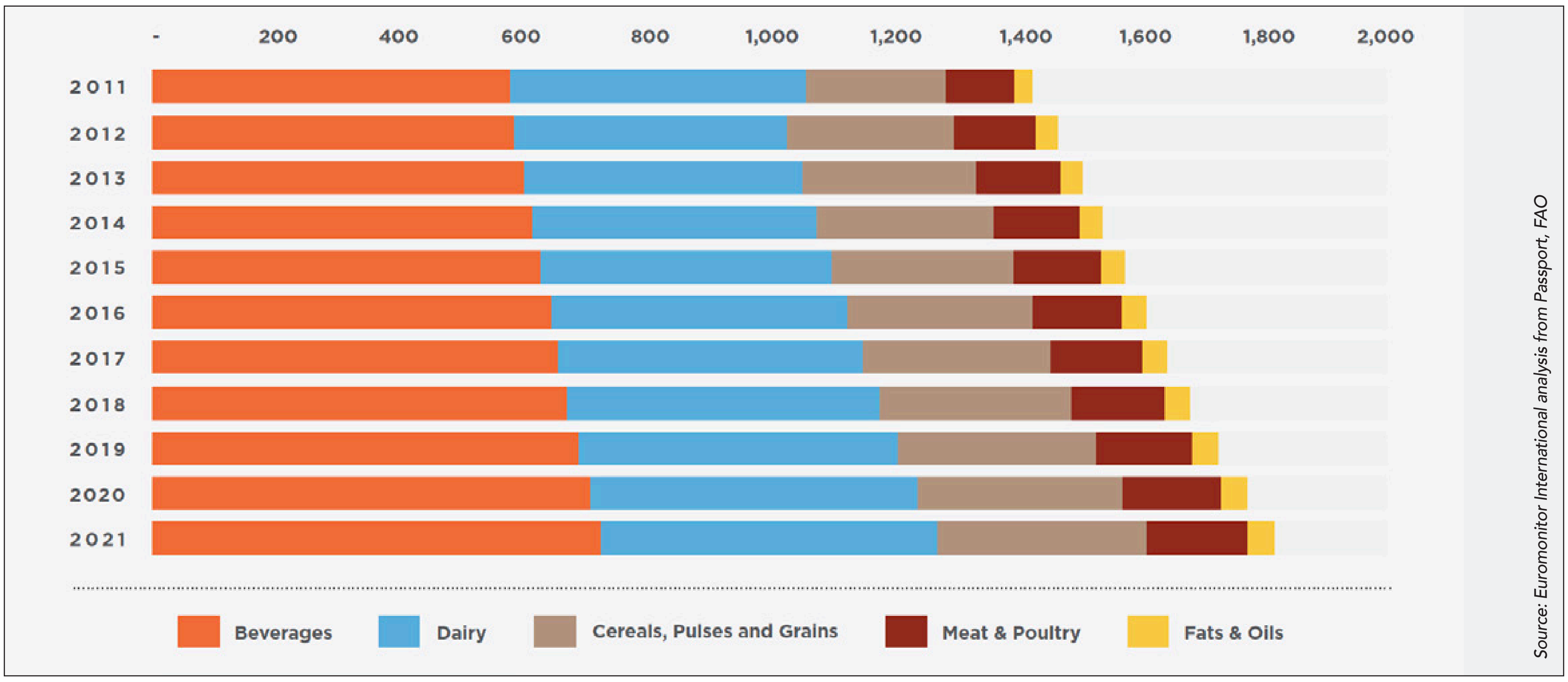
Source: Euromonitor International analysis from Passport



OVERVIEW BY CATEGORY

Beverages dominate global sales of f&b in value, while edible oils is the fastest growing category

Global f&b value share by industry, 2011-2021



Beverages is the largest category, with soft drink dominating overall sales. Forecast growth to 2021 is strong at a 2.5% Cagr with stronger growth in hot drinks. Sugar-laden carbonates are suffering in many markets as consumers search for healthier, reduced/no sugar alternatives such as hybrid juice drinks, low-fat flavoured milks and bottled water.

Dairy is forecast to grow at a 2.3% Cagr to 2021. Improved cold chain infrastructure in major markets such as Latin America, Asia Pacific and Middle East & North Africa is supporting growth in fresh, chilled milk, yoghurts and cheese products. Lactose-free milks are also growing as consumers look for more easily digestible alternatives, in many markets.

Pulses, grains and cereals are becoming more popular elements in a healthy diet with Cagr of 2.3% forecast to 2021. Wider availability and niche products, such as buckwheat or quinoa, specialist aromatic rices, ancient grains such as spelt, farro or kamut and seeds like chia, pumpkin and sesame, are increasingly used as ingredients in foodservice. Growth is strongest in Sub-Saharan Africa where many of these products are staple elements of a traditional diet, but there is also strong demand in Latin America and Middle East & North Africa.

Meat and poultry is the slowest growing category at Cagr 1.3%, directly influenced in mature markets by increasing numbers of flexitarians, vegetarians and vegans. Major manufacturers are working to broaden their product portfolios as the trend towards plant-based protein and meat substitutes gathers pace. In emerging markets, beef and poultry sales are growing as chilled and frozen products gain wider accessibility as cold chain infrastructure expands.

Edible oils, although a small category, is the fastest growing product category as demand, volume sales and price increases. Cagr growth to 2021 sits at 3.7% globally. Olive oil is the most dynamic category responding to growing health concerns worldwide as the demand for natural, low processed, pure oils increases in all markets.

end

ADELANTE, CON JUICIO

GLOBAL CONTEXT IS RECOVERING: OUT OF 198 COUNTRIES ANALYZED, 32 HAVE IMPROVED AND 156 REMAIN STABLE IN THEIR RISK CATEGORIES. BUT BE AWARE OF HIGH LEVELS OF DEBT, AS WELL AS POLITICAL INSTABILITY AND VIOLENCE.

Ten years since the outbreak of the global financial crisis, a few indicators seem to recall the positive pre-crisis dynamics: high growth, controlled inflation, favorable financial conditions, low market volatility, and 'inversion' of the commodities cycle.

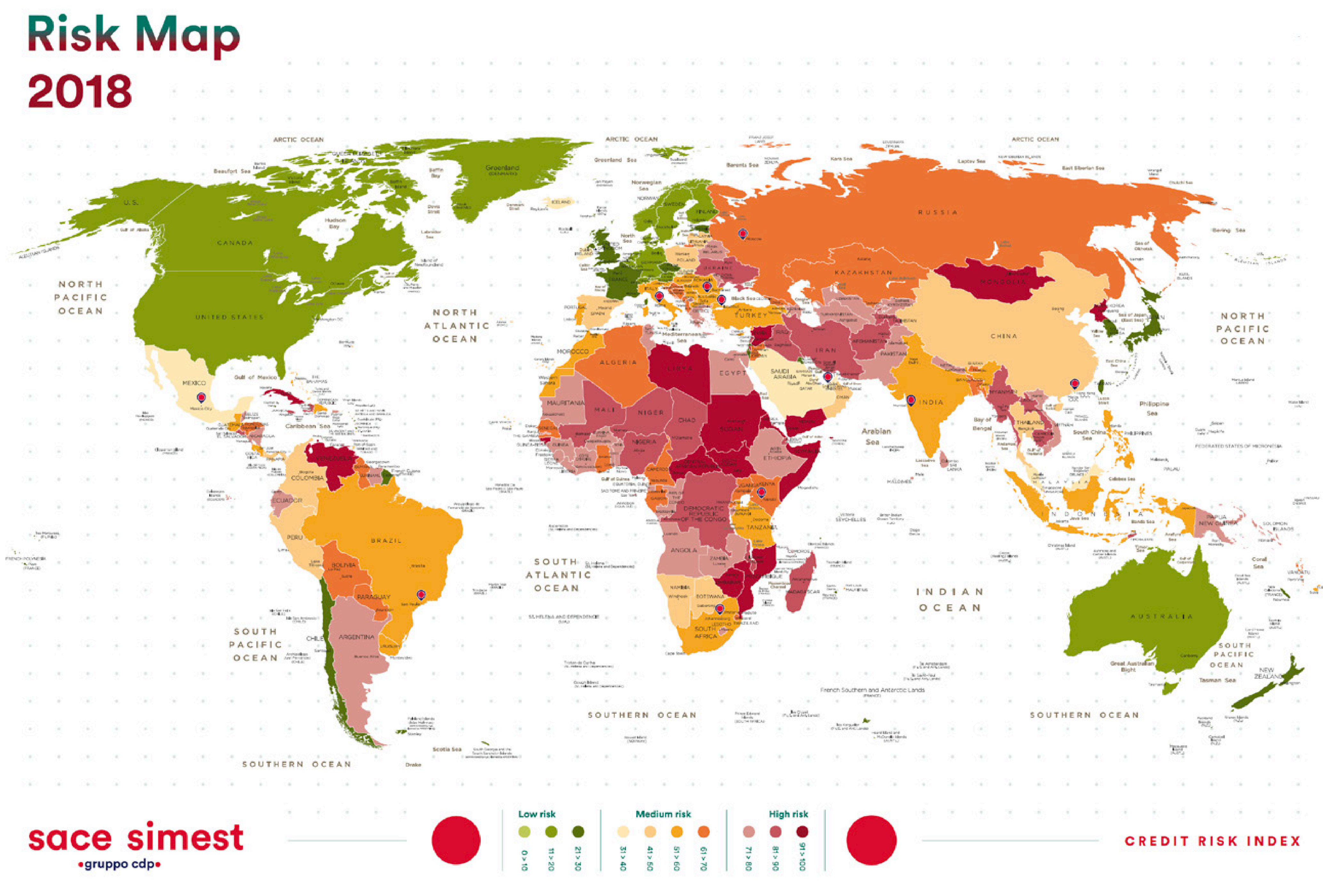
Global growth consolidated in 2017 (+3.6% expected), with the emerging economies acting as the engine (+4.6%), and with a net improvement in the advanced markets as well (+2.2%). This favorable economic context reflected in the dynamics of international trade - which has begun to grow again at a sustained rate (+4.5% in the first ten months of 2017) after the slowdown in the post-crisis period - and has also been shown in Italy, particularly in our exports (+7.8% in the first 11 months of 2017).

Sace, which with Simest forms the export and internationalization hub of the CDP Group, released the new edition of its Risk Map, presenting the expected context in which Italian companies will be operating in its Focus On "2018 Risk Map: Adelante con juicio".

A few factors of instability remain: high levels of debt and uncertainty over the recovery of the commodities cycle are weighing heavily especially on the emerging economies, while instability and political violence are spreading in new areas of the globe. Italian companies will therefore be operating in an improved but still fragile context, in which they will have to move with caution, diversifying geographical areas and arming themselves with risk mitigation instruments.

Credit risk indices are improving

Observing the Sace Map, a general improvement in payment default risk is evident. Out of 198 countries analyzed, 32 have improved their Sace risk status and 156 have remained stable (in total they represent 91% of Italian exports or 380 billion euro). Ten economies had declining risk



status, representing 38.5 billion euro in exports and 9% of the total.

The most significant upgrades concern primarily the advanced economies (four points on average): Portugal, Iceland and Slovenia show an above-average positive change. The emerging economies include upgrades of Egypt, Russia, Brazil, India, and Argentina (the last still at high risk levels, however). The downgrades include China, over concerns about its high debt level, and South Africa, with an economy that remains stagnant and with uncertainty over the election of a new president.

High levels of debt persist

The long-awaited process of deleveraging has not yet started: the stock of global debt continued to rise during the year and equaled 233 trillion dollars at September 2017 (+7.4% over 2016), of which 61 trillion in the emerging countries and 172 trillion in the advanced. Despite the increase in absolute value, widespread economic growth contributed to the fourth consecutive quarterly reduction in the debt/GDP ratio, which in September 2017 reached 318%, three percentage points less than the all-time record of 2016. The debt contracted by companies in the emerging markets has more than tripled since the financial crisis, and in September 2017 it exceeded 28 trillion dollars.

If the commodity cycle 'inverts'?

2017 was a positive year for many commodities, and the projections for the current year are generally optimistic. This is already evident in the attenuation of Sace risk indices in various emerging markets heavily dependent on commodities - including Iraq, Argentina, Indonesia, Saudi Arabia, Russia, Brazil, and the Arab Emirates. There are exceptions, however, such as Venezuela, still affected by internal crisis, and Mongolia. Among the main factors that will affect commodity prices are the shale oil industry in the US and the increasing role of China as a consumer of industrial raw materials.

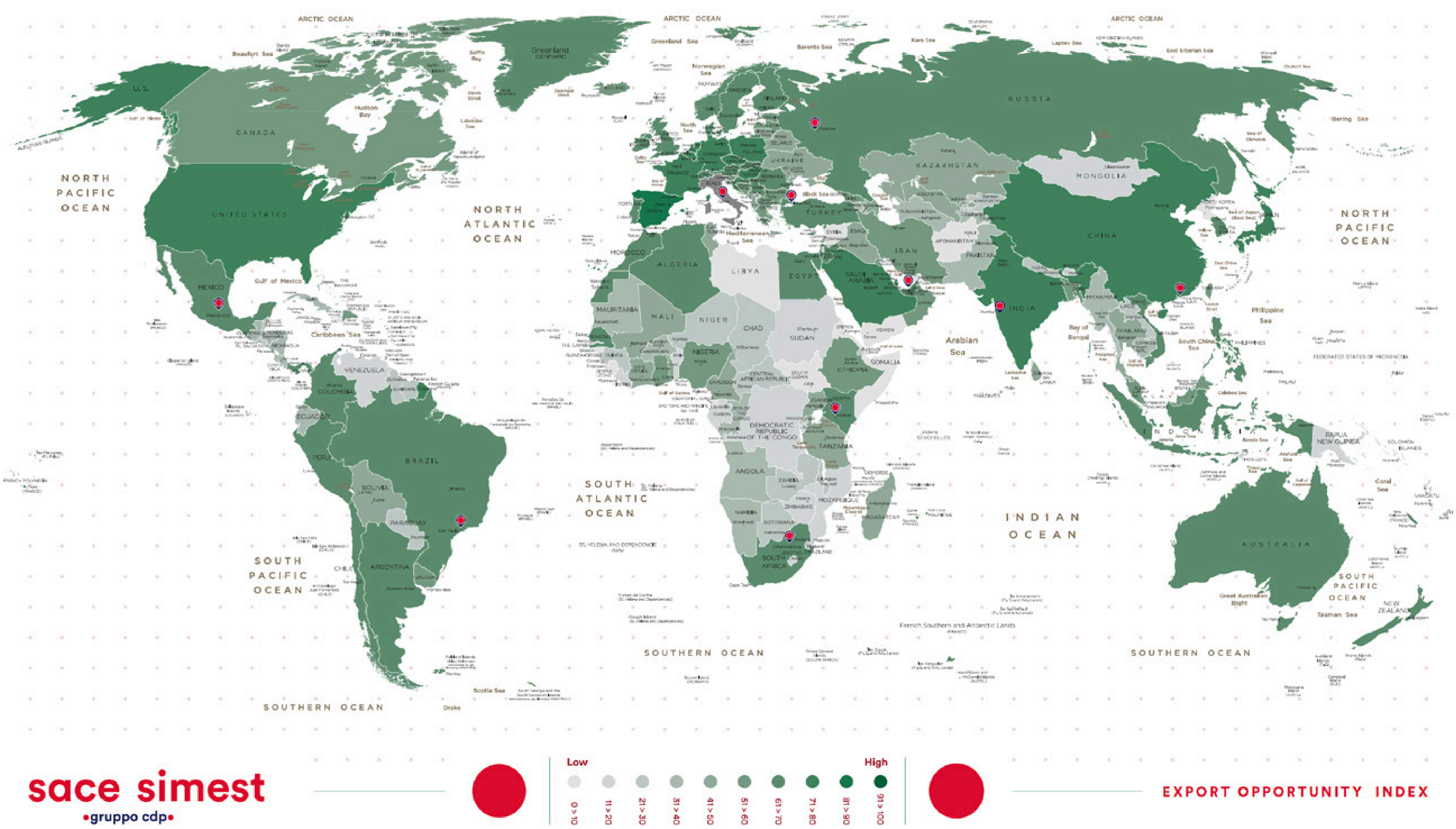
Beware of political risk

In the scenario for 2018 political risk also improved worldwide, particularly the risk of confiscation and expropriation (decline from 52 to 50) and lack of transferability and convertibility (improved from 47 to 46). The risk of political violence, however, is the only category showing a slight global downturn, from 44 to 45. These are some areas where this risk remains critical: Afghanistan, Libya, Pakistan, and Venezuela. The Middle East and North Africa (MENA) and Sub-Saharan Africa remain the most unstable areas (with an average of 58/100 and 56/100, respectively). In the MENA area, in addition to existing conflicts (Syria, Yemen), there are new potential breeding grounds (Qatar, Lebanon, Iran), while in Sub-Saharan Africa the high growth potential of the continent suffers the negative effects of critical chronic situations (Central African Republic, Democratic Republic of the Congo, South Sudan) and new terrorist threats. The election cycle starting in Latin America (Brazil, Colombia, Mexico, and Venezuela) might lead to situations of instability with the rise of populist forces.

Mappa dei Rischi Sace 2018: Adelante, con juicio

Nel corso del 2017 la crescita globale si è rafforzata, con benefici significativi sull'export di molti Paesi, Italia compresa. È quanto evidenzia il rapporto 'Mappa dei Rischi Sace 2018: Adelante con juicio', che entra nel merito della situazione geopolitica mondiale per fornire indicazioni circa i livelli di rischio relativi alle attività commerciali condotte nei singoli Paesi. L'assunto che sorride alle aziende della Penisola è il seguente: su 198 nazioni analizzate, 138 hanno un profilo di rischio creditizio migliore o invariato rispetto allo scorso anno. Se guardiamo inoltre alle 15 geografie prioritarie identificate da Sace - che insieme rappresentano circa il 20% dell'export italiano nel mondo - le prospettive si presentano particolarmente incoraggianti perché circa la metà di questi Paesi hanno migliorato il loro profilo creditizio. Il trend positivo, però, nasconde delle insidie. I fattori di rischio latenti, secondo gli esperti, sono tre: indebitamento, volatilità dei prezzi delle commodity, instabilità e violenza politica.

Export Map 2018



RUN ORGANIC, RUN

ACCORDING TO 'THE WORLD OF ORGANIC AGRICULTURE' REPORT, ISSUED BY FIBL AND IFOAM, THE SECTOR'S GLOBAL TURNOVER EXCEEDED 80 BILLION EURO IN 2016. ITALY ACCOUNTS FOR 14.5% OF TOTAL FARMLAND.

The 2018 edition of 'The World of Organic Agriculture' report (data per end of 2016) published by the Swiss Research Institute of Organic Agriculture (FiBL) and IFOAM – International Federation of Organic Agriculture Movements, shows that the positive trend experienced in the past years continues: consumer demand is rising, more farmers cultivate organically, more land has been organic certified, and 178 countries report organic farming activities.

In 2016, the global market for organic food reached 89.7 billion US dollars (over 80 billion euro). The United States lead the rank with 38.9 billion euro, followed by Germany (9.5 billion euro), France (6.7 billion euro), and China (5.9 billion euro). The highest per capita spending was in Switzerland (274 euro), and Denmark had the highest organic market share (9.7% of the total food market). In 2016, 2.7 million organic producers were reported. India continues to be the country with the highest number of producers (835,200), followed by Uganda (210,352), and Mexico (210,000).

According to the survey, a total of 57.8 million hectares were organically managed at the end of 2016, up by 7.5 million hectares over 2015: the largest growth ever. Australia is the country with the largest organic agricultural area (27.2 million hectares), followed by Argentina (3 million), and China (2.3 million). Almost haft of the global organic agricultural land is in Oceania (27.3 million hectares), followed by Europe (23%; 13.5 million hectares), and Latin America (12%; 7.1 million hectares).

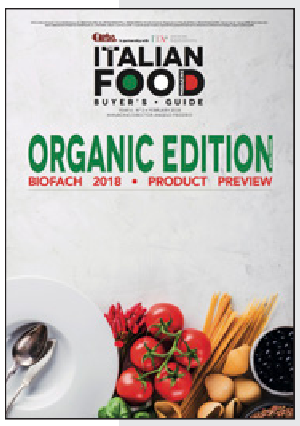
The countries with the largest organic share of agricultural land of their total farmland are the Liechtenstein (37.7%), French Polynesia (31.3%), and Samoa (22.4%). In 15 countries, 10% or more of all agricultural land is organic, a new record.

What about Italy?

In this scenario, Italy plays a key role: in 2016, thanks to an increase of over 300 thousand hectares, the agricultural land cultivated according to organic methods in Italy reached 14.5% of the total. Nevertheless, with 44 euros in per capita consumption, Italy is still far behind the countries that make up the top 10: Switzerland (274 euro), Denmark (227 euro), Sweden (197 euro), Luxembourg (188 euro), Austria (177 euro), Liechtenstein (171 euro), USA (121 euro), Germany (116 euro), France (101 euro) and Canada (83 euro). Nevertheless, Italy occupies a leading position in terms of exports: with almost 2 billion euro it ranks first in Europe and second - after the United States - on a global scale.

L'inarrestabile corsa del bio

Il biologico mondiale cresce per fatturato, numero di aziende e superfici coltivate. Lo dicono i numeri presentati dall'Istituto di ricerca svizzero Fibl e dall'ente internazionale Ifoam. Nel rapporto 'The World of organic agriculture', che fa riferimento al 2018 ma è una raccolta dei dati definitivi 2016 come comunicati dalle associazioni bio di 178 nazioni, si rilevano oltre 80 miliardi di euro di fatturato complessivo, 2,7 milioni di produttori e 57,8 milioni di ettari (erano 11 milioni nel 1999) coltivati con i metodi dell'agricoltura biologica, che pesano per l'1,2% sulla superficie agricola utilizzata nel mondo. In questo scenario l'Italia gioca un ruolo da protagonista: nel 2016 le superfici coltivate con metodo biologico nel Bel Paese hanno raggiunto quota 14,5% sul totale complessivo.

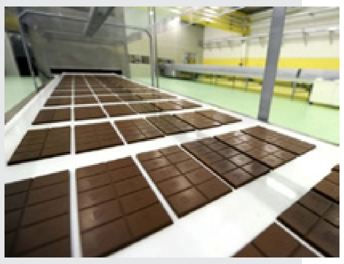


THE ITALIAN FOOD MAGAZINE: STUNNING SUCCESS FOR THE FIRST 'SPECIAL ORGANIC EDITION'

During Biofach 2018 (Nurnberg, 14-17 February), the very first The Italian Food Magazine – Organic Edition (Spring/Summer) made its debut. Distributed at the international press corners of the German trade show and at the ITA-Italian Trade Agency booth, the magazine showcased the best of Italian organic production and was highly appreciated both by visitors and exhibitors.

NEWS FROM THE SECTOR

ICAM'S GROWTH IS DRIVEN BY EXPORTS AND ORGANIC



Icam closed 2017 with a 154-million-euro revenue, up by 5% on a yearly basis. Results achieved thanks to exports directed to more than 75 countries (+13%, worth 89 million euro), and to its organic range, that is worth 86 million euro (+14%).

INALPI: THE ORGANIC RANGE IS GETTING WIDER

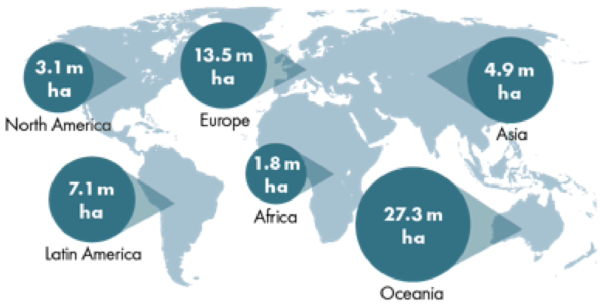
After closing 2017 with a 145-million-euro turnover, Inalpi - leading producer of high quality powdered milk, butter and whey - is betting on organic and on premium products to keep on growing. "In the months ahead, our organic range will be further enriched with a grated hard cheese, one fontal and one mozzarella", said the company chairman, Ambrogio Invernizzi. Exports are expected to exceed 35%.

PROBIOS: NEW PRODUCTS TO CELEBRATE ITS 40TH ANNIVERSARY

Probios, one of Italian leading distributors of organic and vegetarian products, as well as products for special dietary requirements, is celebrating its 40th anniversary. On occasion of Biofach 2018, the company showcased its latest product innovations, that include: Crispy crackers with chickpeas, Hemp and basil spread in aluminum tube, and the Mayorice range: 100% plant-based, available in six different flavors.

The World of Organic Agriculture 2016

Organic Farmland 2016



57.8 m ha Organic farmland in million hectares

+15% From 2015

178 Countries with organic farming

Top 3 countries
(land in million of hectares)

Australia 27.1

Argentina 3.0

China 2.3

Organic Producers 2016

The number of organic producers is increasing

2.7 million Organic farmers

+12.8% From 2015

Number of producers:
Top 3 countries

India 835'000

Uganda 210'352

Mexico 210'000

Organic Market 2016

The global market is growing and consumer demand is increasing

More than 80 Global organic food market in billion euros

Top 3 countries
(market in billion euros)

USA 38.9

Germany 9.5

France 6.7

Ireland 21.8% Organic market growth

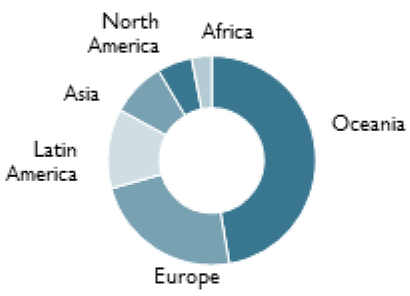
Denmark 9.7% Market share

Switzerland 274 € Highest per capita spending is in Switzerland

ORGANIC FARMLAND 2016

World
57.8
Mio ha

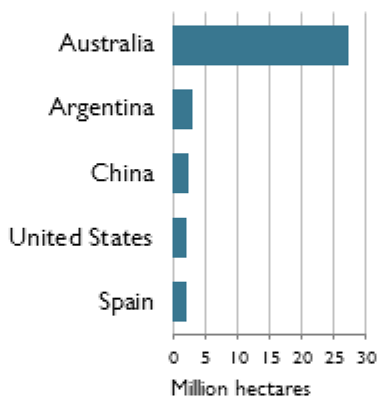
In Oceania there were 27.3 Mio ha, in Europe 13.5 Mio ha, and in Latin America 7.1 Mio ha.



Distribution of organic agricultural land by region 2016

Australia
27.1
Mio ha

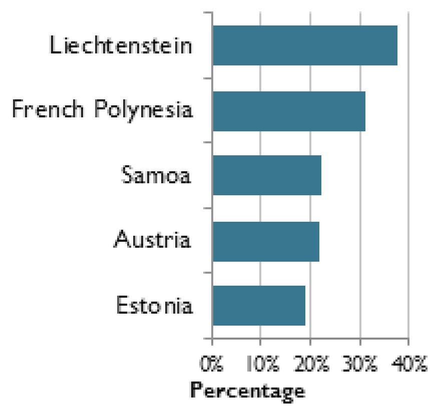
The ten countries with the largest organic agricultural areas represent 76% of the world's organic agricultural land.



The five countries with the largest areas of organic agricultural land 2016

1.2% of the world's farmland is organic

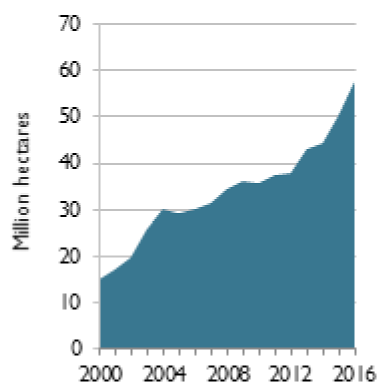
15 countries have 10% or more of their agricultural land under organic management.



Top 5 countries with more than 10 percent of organic agricultural land 2016

+420% since 1999

In 2016, over 7.5 million hectares more were reported compared with 2015.



Growth of the organic agricultural land 2000-2016

Source: FIBL survey based on national sources

GRAN MORAVIA

The ECO-SUSTAINABLE CHAIN

granmoravia.com

Brazzale dal 1784

THE NUMBERS OF THE ECO-SUSTAINABLE CHAIN GRAN MORAVIA

AGRICULTURAL LAND	80.000 Hectares
FARMS	75
AVERAGE DISTANCE FROM CHEESE FACTORY	ø 70 km.
LACTATING COWS	17.000
HECTARES FOR EACH LACTATING COW	>4,5 Hectares
LOAD OF NITRATES	ø 35 Kg / Hectares
AFLATOXINS IN THE MILK	<0,005 µG/KG

AVARAGE MILK PRODUCTION FOR EACH COW	ø 24 Lt./Day
COWS IN INDIVIDUAL BERTHS	100% +/- 3%
FORAGE SELF-SUPPLY	100%
FODDER SELF-SUPPLY	>90 %
AFLATOXINS IN THE FINISHED PRODUCT	0
Save the water GRAN MORAVIA Water Footprint — BLUE WATER	72 Lt./Kg of Gran Moravia
Save the water GRAN MORAVIA Water Footprint — GREEN WATER	2.094 Lt./Kg of Gran Moravia

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