

TECH4FOOD MAGAZINE

DESIGN • KNOW HOW • INNOVATION • VISION

Edizioni Turbo Srl - Corso della Resistenza, 23 - 20821 - Meda (MB) - Tel. +39 0362 600463/4/5/9 - Fax. +39 0362 600616 - Periodico bimestrale - Registrazione al Tribunale di Milano n. 2 del 4 gennaio 2018 - Stampa: Italgrafica - Novara - Poste Italiane Spa - Sped. in Abbonamento Postale DL 353/2003 (conv. in L. 27.02.2004, n.46) art. 1, comma 1, LO/MI - In caso di mancato recapito inviare al CMP di Milano Roserio per la restituzione al mittente previo pagamento resi.

focus on



Packaging: happy island

The Italian industry's turnover is expected to increase by a further 6.8% in 2018, at 7.7 billion euros. Export is driving growth, but the Italian market is developing too. The data issued by Ucima.

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economic scenarios

What future for global trade?

Protectionism, custom duties, internationalization opportunities for Italian companies. The 2018 edition of the Ice-Prometeia report.

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reportage

The gateway to the Middle East

A successful outcome for the 2018 edition of Gulfood Manufacturing in Dubai. Strategic event dedicated to food technologies in the Mena region. An overview of the Italian companies that attended the show.

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the company

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Preservation and packaging: “It’s a matter of quality”

Ice-Tek and Airless Vacuum Systems by Minerva Omega Group at the top of the bread and pastry making and delicatessen sectors.

PROSWEETS 2019 - PRODUCT PREVIEW

It's a sweet world

The Cologne trade fair ground is ready to host the 11th edition of the international supplier trade fair for the confectionery and snacks industry (27th-30 January 2019). Below is a preview of the technological solutions presented by Italian exhibitors.

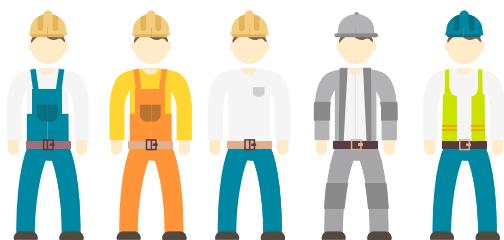


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the survey

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JOBS 4.0



The future of the world of work in a report published by the World Economic Forum. The opportunities provided by new technologies. And the roles expected to grow, starting from data analysts and scientists, software and applications developers, e-commerce and social media specialists.

SPECIAL INSERT

TRADE SHOWS 2019

The global and Italian trade exhibition's calendar



the report

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Counterfeit products: detentions on a decreasing trend in Europe

According to a EU Commission's report, customs authorities detained over 31 million fake goods in 2017, for a value of over 580 million euro. Packaging remains in the top 10 of the most affected categories.

United Arab Emirates New opportunities for growth

Market size, trends, forecasts and growth perspectives for manufacturers of food & beverage packaging and processing machinery. The findings of a survey commissioned by ITA and Cibus Tec.

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Six, the magic number

By Riccardo Colletti

Prosweets Cologne, Cifa Rennes, Iffa Frankfurt, Ibie Las Vegas, Cibus Tec Parma, Gulfood Manufacturing Dubai. These are the leading trade shows (not the only ones, of course) that will bring together food machinery manufacturers and the related businesses. Italy, as usual, is ready to take the lion's share. These six big events - that represent a strategic meeting place for a sector that is experiencing continuous evolution - are and will be also the first showcases of our magazine, **Tech4Food**, that for 2019 has strengthened and increased to six the number of issues in order to keep on being a sort of 'standard-bearer' for the Italian food processing machinery industry.

A more direct presence, especially on strategic markets, new partnership agreements with trade show organizers and institutions all over the world: this is what we have done so far, in order to provide more visibility to Made in Italy, and we are ready to further expand our presence to new, unexplored territories. In a few words, this is going to be a real journey around the world, aimed at spreading the knowledge of companies and products that can boast unique features: the knowledge and passion of Italian entrepreneurs, the style and design of tailor-made solutions, without forgetting a distinctive trait of Italy: its creativity.

The year 2019 is of strategic importance for the food machinery industry. Major economic indicators - also for the Old

Country - are hard to understand in a medium-long term. Too many variables may affect the course of events. Just think of current trade tensions connected with custom duties, or the political uncertainties in some countries.

According to analysts - not only those of Wall Street - it is generally felt that the global economic scenario will experience this year a sharp downturn. The closure of a decade that, nevertheless, has proved to be more than valuable in terms of international growth. It's hard to predict how pessimistic the outlook could be. Often some 'scary' predictions are the result of studies too much connected with paper and monitors, and too dissociated from real life. You must not think that everything is going to be easy, but as it happens in everyday life, changes and evolutions (starting from the positive ones) are daily occurrence. Hence, we must keep a cool head and employ positive thinking. We must have a forward-looking approach, enhancing one's corporate identity profile, and communicating it with conviction. Especially because this really belongs to the Italian companies' DNA. Without exaggerating, it would be detrimental to withdraw from the ongoing path. And if the (trade) battle turned out to be harder than expected, then keep in mind the famous quote: "When the going gets tough, the tough get going."

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MAGAZINE

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20821 - Meda (MB)
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Periodico bimestrale - Registrazione al
Tribunale di Milano n. 2 del 4 gennaio 2018
Numero 1/2 - Gennaio/Febrero 2019 -
Stampa: Italgrafica - Novara -
Poste Italiane Spa -
Sped. in Abbonamento Postale
DL 353/2003 (conv. in L. 27.02.2004, n.46)
art. 1, comma 1, LO/MI -
In caso di mancato recapito, inviare
all'ufficio postale di Roserio per la
restituzione al mittente che si impegna
a pagare la relativa tariffa.
Una copia 1,00 euro -
Abbonamento annuo 20,00 euro
L'editore garantisce la massima
riservatezza dei dati personali in suo
possesso. Tali dati saranno utilizzati per
la gestione degli abbonamenti e per
l'invio di informazioni commerciali. In base
all'Art. 13 della Legge n° 196/2003, i dati
potranno essere rettificati o cancellati in
qualsiasi momento scrivendo a:
Edizioni Turbo S.r.l.
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Corso della Resistenza, 23
20821 Meda (MB)

Questo numero è stato chiuso
in redazione il 18 gennaio 2019

Sei, il numero magico

Prosweets a Colonia, Cifa a Rennes, Iffa a Francoforte, Ibie a Las Vegas, Cibus Tec a Parma, Gulfood Manufacturing a Dubai. Sono i principali appuntamenti fieristici (non gli unici intendiamoci, anzi) intorno ai quali si muoverà in maniera poderosa il business legato al meccano-alimentare. L'Italia è pronta ai nastri di partenza e a recitare la parte del leone come vuole la tradizione. Questi sei grandi eventi - che rappresentano il crocevia strategico per un settore in costante evoluzione - sono e saranno anche i primi approdi per la nostra rivista **Tech4Food** che, per il 2019, ha potenziato e portato a sei il numero di uscite per continuare a essere (sia detto senza alcuna presunzione) una sorta di 'portabandiera' delle eccellenze tecnologiche italiane del meccano-alimentare.

Più presenza diretta, maggiore capillarità sui mercati, nuovi accordi con enti fieristici e istituzionali nel mondo: è tutto quanto abbiamo perfezionato al momento - ma con la prontezza a integrare la nostra presenza anche su altri territori - per dare sempre più visibilità e forza al Made in Italy. Come

a dire che sarà un viaggio intorno al mondo, che ha l'obiettivo di raccontare storie d'azienda e prodotti che vantano e sfruttano tratti distintivi ben connotati: la competenza e la passione degli imprenditori, lo stile e il design che consentono di pensare a soluzioni 'fatte su misura', il tutto condito da quella creatività che è riconosciuta all'Italia in tutto il mondo.

Il nuovo anno 2019 assume una rilevanza strategica per il settore del meccano-alimentare. Gli indicatori economici generali - anche sul Vecchio Continente - risultano difficili da leggere con una prospettiva medio-lunga. Ci sono troppe variabili al contorno destinate a incidere. Le tensioni commerciali legate ai dazi, le incertezze politiche in alcuni paesi importanti - giusto per citare qualche esempio - non consentono di avere un quadro complessivo facile da leggere. Secondo gli analisti - non soltanto quelli del Wall Street - è opinione diffusa che il ciclo economico globale vivrà proprio quest'anno una fase di rallentamento accentuata. Che coincide con la chiusura di un decennio risultato comunque più

che apprezzabile in termini di crescita su scala internazionale. Quanto sia pessimistico il quadro è difficile dirlo. Spesso e volentieri alcune previsioni (che spaventano) sono il frutto di studi condotti "troppo" davanti a carte e monitor e meno connessi con la vita reale. Il che non deve far pensare che sia o sarà tutto facile. Ma come dimostra la storia recente, vale la pena ricordare che i cambiamenti e le evoluzioni (a cominciare da quelle positive) sono all'ordine del giorno. Pertanto, servono nervi saldi e pensieri positivi. È indispensabile andare e guardare oltre, senza per questo fingere di fronte alle evidenze. In quest'ottica è più che mai fondamentale accentuare il proprio profilo identitario di impresa, valorizzarlo, comunicarlo e raccontarlo con convinzione. Tanto più perché appartiene realmente al Dna delle aziende italiane. Senza eccedere, sarebbe però deleterio immaginare di recedere da un percorso. E se la battaglia (commerciale) dovesse rivelarsi più dura e complicata, allora meglio tenere a memoria il famoso detto: "Quando il gioco si fa duro, i duri cominciano a giocare".

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Loaves cutter

Panel view

Exit check - weigher
with rejecting belt

In - line scale
&
Loaf lenght measurement

Guillotine cutter
(stainless steel
or ultrasonic blade)





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Packaging: the Ems Group is born

The 100% of Emmeti shareholding, located in Montecchio Emilia (Reggio Emilia) and of the associated companies Mectra (Montecchio Emilia), Sipac and Logik (Fontevivo, Parma), has been sold to the Luxembourg private equity Xenon. The Ems Group is now born, a giant in the packaging sector: 290 employees and a turnover of 130 million euros, with a strong international presence and network (with Italy representing just 25% of the turnover). Emmeti, founded in 1973, and Mectra (a spin-off company of Emmeti) are amongst the world leaders in palletizing and depalletizing systems for beverage, food, glass containers and metallic can lines. Future projections for this market are talking about an annual growth of 6%. Giovanni Ronconi, Mectra's managing director, will be the new ceo of the group. Xenon Private Equity takes over the control of the Group, in which, along with Mr. Ronconi, are Mr. Corrado Azzali (ceo of Sipac and coo of Ems Group) and Mr. Paolo Biondi as sales director.

Packaging: nasce Ems Group

Xenon, private equity lussemburghese, ha rilevato il 100% del capitale delle società Mectra ed Emmeti di Montecchio Emilia (Reggio Emilia), e Sipac e Logik di Fontevivo (Parma). Un'operazione che porta alla nascita di Ems Group, nuovo colosso emiliano del packaging, con un giro d'affari di 130 milioni di euro e 290 dipendenti. Nello specifico, il gruppo progetta, realizza e installa linee complete per l'industria vetraria, linee di trasporto e sistemi di palettizzazione/depalettizzazione per l'industria dei contenitori in Pet/Hdpe e dell'imbottigliamento, quindi il settore degli scatolifici, quello alimentare, del pet food e del can-making con quote di mercato anche in ambito chimico, petrolchimico e farmaceutico. Giovanni Ronconi, ad di Mectra, sarà il ceo del nuovo gruppo. Nel management anche Corrado Azzali (ceo di Sipac e coo di Ems) e Paolo Biondi (sales director).

New headquarters for Sacmi Packaging & Chocolate

On the past 12th December, the new headquarters of Sacmi Packaging&Chocolate - one of the business units belonging to the Imola-based Sacmi plant engineering group - was inaugurated. With 60 employees and annual sales touching 20 million euro, the Sacmi Packaging&Chocolate wrapping division is moving from its previous site in Ozzano Emilia to via Ca' Bianca 730 in Castel San Pietro. "Sacmi's strategy in this business involves a far-reaching technology and facility investment plan," said Sacmi Packaging&Chocolate's manager, Giovanni Campolungo. "The decision to base operations in Castel



San Pietro stems from the area's extensive primary packaging and wrapping technology know-how."

Nuova sede per Sacmi Packaging&Chocolate

Taglio del nastro, lo scorso 12 dicembre, per la nuova sede di Sacmi Packaging&Chocolate, una delle business unit del colosso dell'impiantistica industriale Sacmi di Imola. Con 60 dipendenti e un fatturato di 20 milioni di euro, sarà il perno delle attività del Gruppo nell'ambito delle macchine incartatrici per l'industria dolciaria. Presente all'inaugurazione il Consiglio di amministrazione e la dirigenza Sacmi, accanto al sindaco di Castel San Pietro, Fausto Tinti. "La strategia di Sacmi in questo business prevede un ampio piano di investimenti in tecnologie e strutture", spiega Giovanni Campolungo, amministratore delegato di Sacmi Packaging&Chocolate. "La scelta di Castel San Pietro prende le mosse dall'ampio know how che questo territorio esprime nell'ambito del packaging primario e delle tecnologie per l'incarto".

The interpack alliance lands in the Middle East with 'pacprocess Mea': the first edition in December 2019

The interpack alliance of Messe Düsseldorf expands into the Middle East Africa (Mea) region with a new trade show: its 'pacprocess Mea' will be held annually at the Egypt International Exhibition Center in Cairo starting from December 2019 (9th-11th). The trade fair can count on broad-based support from numerous partners from business and Egyptian government organisations and associations. The fair addresses the eight core target groups of the interpack alliance: food, beverages, pharmaceuticals, cosmetics, confectionery and bakery, non-food and industrial goods; and all of these across the entire value chain. It also targets the suppliers of packaging means, packaging materials and the associated manufacturing technology.



Interpack sbarca in Medio Oriente con 'pacprocess Mea': la prima edizione a dicembre 2019

Importanti novità per l'interpack alliance, che entra nella regione dell'Africa mediorientale (Mea) con un nuovo evento fieristico il cui debutto è fissato dal 9 all'11 dicembre 2019, presso l'Egypt International Exhibition Center del Cairo. La rassegna si chiamerà 'pacprocess Mea' e potrà contare su un ampio sostegno da parte di importanti partner del mondo imprenditoriale, delle organizzazioni governative egiziane e delle associazioni di settore. La fiera si rivolge agli otto principali target dell'interpack alliance: generi alimentari, bevande, prodotti farmaceutici e cosmetici, dolci e prodotti da forno, beni di consumo e beni industriali; oltre a fornitori di confezioni, di materiali per l'imballaggio e corrispondente tecnologia di produzione.

Ima: closing of the sale of 60% of the investment in Ima Dairy & Food

Ima, Italian packaging giant, completed the sale of 60% of the investment in Ima Dairy & Food Holding GmbH (Ima D&F) with TB Tauris Italia, owned by Thomas Becker, ceo of Ima D&F, as announced on the past November. The equity value of the transaction is 18 million euro, of which 13 million euro was paid at the closing with the rest to be paid by June 2019. Impresa Italia, a private debt fund managed by Riello Investimenti Partner Sgr, provided the acquisition financing by subscribing a 7 million euro bond issued by TB Tauris Italia.

Ima: perfezionata la vendita del 60% della divisione Dairy & Food

Ima, gigante bolognese del packaging, ha perfezionato con Tb Tauris Italia, di proprietà di Thomas Becker, amministratore delegato di Ima Dairy & Food Holding GmbH (Ima D&F), il closing relativo alla vendita del 60% della partecipazione in D&F, annunciata lo scorso 14 novembre. Il controvalore della transazione è di 18 milioni di euro, di cui 13 milioni di euro versati al closing e la parte rimanente entro giugno 2019. Il fondo di private debt Impresa Italia, gestito da Riello Investimenti Partners Sgr, ha fornito l'acquisizione financing sottoscrivendo un prestito obbligazionario di 7 milioni di euro emesso da TB Tauris Italia.

Industrial refrigeration: the Romanian firm Daas enters the Epta Group

In a bid to consolidate its presence in Central and Eastern Europe, the Epta Group has announced the acquisition of Daas, a Romanian firm active in the commercial and industrial refrigeration sectors. Headquartered in Ploiești, 60 km north of Bucharest, Daas also has facilities in Bucharest, Iasi and Cluj. In keeping with its policy of internationalisation, the Epta Group said the acquisition would consolidate its position in the Europe, its core market, by establishing direct coverage of areas with the greatest potential. "This agreement will allow us to grow together and be even more competitive whilst benefitting from each other's competences," said Marco Nocivelli, chairman and ceo of Epta. "We aim to deliver turnkey projects in Romania thanks to our wide range of technologically advanced and sustainable solutions." Epta already has a presence in Central and Eastern Europe thanks to Epta International, a technical and commercial coordination centre in Hungarian capital Budapest, and Epta Polska, established in 2017 following the acquisition of Libre Sp. z o. o. Sp. K.

Refrigerazione commerciale: l'azienda rumena Daas entra nel Gruppo Epta

Epta annuncia l'acquisizione di Daas, azienda leader in Romania nel settore della refrigerazione commerciale, industriale e Horeca, con sede a Ploiesti e tre stabilimenti a Bucharest, Iasi e Cluj. Un'acquisizione che rientra nelle strategie di internazionalizzazione del Gruppo Epta, che mira a consolidarsi in Europa, suo core market, tramite la costituzione di presidi diretti nei mercati a maggiore potenziale. "Siamo orgogliosi di dare il benvenuto a Daas, nostro storico partner commerciale da oltre 15 anni. Un accordo che ci permetterà di crescere insieme ed essere ancora più competitivi, beneficiando delle reciproche competenze, per offrire in Romania progetti turn key grazie alla nostra ampia gamma di soluzioni tecnologicamente avanzate e sostenibili, garantendo, al contempo, un migliore supporto ai clienti, a livello locale, in ogni fase del progetto", commenta Marco Nocivelli, presidente e amministratore delegato di Epta. In Europa centro-orientale l'azienda opera attraverso Epta International, con sede in Ungheria, ed Epta Polska, costituita contestualmente all'acquisizione di Libre Sp. z o.o. Sp.K. in Polonia l'anno scorso.

Tecno Pool acquired Logiudice Forni and Mimac Italia

Large-scale operation in the sweets & bakery industry: Tecno Pool, controlled by Xenon Private Equity, has completed the acquisition of Logiudice Forni (Arcole, Verona), and Mimac Italia (Piovene Rocchetta, Vicenza) from private investors.

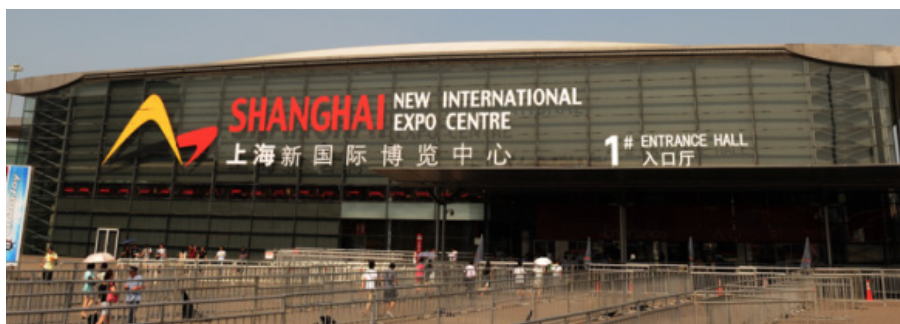


The deal led to the creation of a Group active in the manufacturing machinery for the baking industry with a workforce of 500 people and eight plants in four countries. For Tecno Pool, production value exceeded 64 million euro in 2017, of which more than 80% generated on global markets. Mimac Italia is specialized in the production of dropping machines for pastry, has 25 employees and a turnover of 8.9 million euro in 2017. Logiudice Forni, instead, closed 2017 with a turnover of 21.9 million euro, employs 48 people and is specialized in the manufacturing of ovens and machinery for bakery and confectionery. The new Group, made up of entrepreneurs from the Veneto region, will generate combined sales of around 100 million euro.

Tecno Pool acquisisce Logiudice Forni e Mimac Italia

Maxi operazione nel campo delle tecnologie per il bakery e confectionery: il gruppo padovano Tecno Pool, produttore di impianti per il trattamento termico degli alimenti, ha perfezionato l'acquisizione delle aziende Logiudice Forni di Arcole (Verona) e Mimac Italia di Piovene Rocchette (Vicenza), specializzate nella produzione di macchine per pasticceria. Regista dell'acquisizione il fondo Xenon Private Equity, che lo scorso aprile è entrato nel capitale di Tecno Pool a fianco della famiglia Lago. Per Tecno Pool, il valore della produzione nel 2017 ha superato i 64 milioni di euro, realizzati per oltre l'80% all'estero. Mimac Italia è specializzata nella produzione di macchine colatrici per pasticceria, conta 25 dipendenti e un fatturato che nel 2017 è stato di 8,9 milioni di euro. Logiudice Forni, dal canto suo, ha chiuso il 2017 con un giro d'affari di 21,9 milioni di euro, conta 48 dipendenti ed è specializzata in forni e macchine per panificazione e pasticcerie. Il nuovo Gruppo si presenta sul mercato globale forte di un giro d'affari complessivo che si attesta sui 100 milioni di euro, otto unità produttive in quattro Paesi e oltre 500 dipendenti.

E-Pack Tech: the new Chinese trade show of Fiera Milano (Shanghai, 23-26 October 2019)



After the recent acquisitions of two exhibitions in China and one in Brazil, Fiera Milano continues to implement its internationalization strategy through the export of successful exhibition models outside the national borders. And it does so with the creation of E-Pack Tech, the new event dedicated to technologies and packaging materials for e-commerce, in partnership with Ipack Ima. The event is organized by Fiera Milano through Hannover Milano Fairs Shanghai, a Chinese joint venture with Deutsche Messe AG, and that will take place in Shanghai in October 2019 within CeMAT Asia, a reference event for China dedicated to internal handling, technological automation, transport and logistics systems.

Arriva E-Pack Tech, nuova rassegna cinese di Fiera Milano (Shanghai, 23-26 ottobre 2019)

Dopo la recente acquisizione di due manifestazioni fieristiche, una in Cina e una in Brasile, Fiera Milano continua a scommettere sulla propria strategia di internazionalizzazione attraverso l'implementazione, al di fuori dei confini nazionali, di modelli fieristici di grande successo. È il caso di E-Pack Tech, nuova rassegna dedicata alle tecnologie e ai materiali di imballaggio per l'e-commerce, in partnership con Ipack Ima. L'evento è organizzato da Fiera Milano attraverso Hannover Milano Fairs Shanghai, società cinese in joint venture con Deutsche Messe AG, e si svolgerà presso il New International Expo Centre di Shanghai, dal 23 al 26 ottobre 2019 parallelamente a CeMAT Asia, manifestazione di riferimento, nel paese asiatico, per la logistica e l'automazione tecnologica.



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Preservation and packaging: “It’s a matter of quality”

Ice-Tek and Airless Vacuum Systems by Minerva Omega Group at the top of the bread and pastry making and delicatessen sectors.

With its operational and production headquarters in Bologna, Emilia Romagna, a region with a strong mechanical and electronic tradition, Minerva Omega Group is one of the biggest leaders in the design and production of food processing machines with over 70 years of technical experience and skill. Its business model is based solely on the quality of the machines it produces using cutting-edge and advanced production processes. Constantly focused on developing new lines, in recent years it launched Ice-Tek, a successful series of ice makers, and Airless Vacuum Systems, a truly professional response to vacuum packaging and preservation requirements. Both lines are widely used in the bread and pastry making and delicatessen sectors of large wholesalers and smaller scale outlets due to their excellent technical performance, reliability and range, with models designed to meet any requirement, and due to their ease of use and maintenance. Ice-Tek ice makers and Airless vacuum packaging machines can be integrated with the exclusive NeMoSy remote control and management system, which acquires, sends, analyses and views data via the Internet. The IoT is already a reality for Minerva Omega Group machines.

The importance of cooling and proper preservation in the production process

The purpose of cooling food to below room temperature while it is being processed is to: stop or slow chemical and enzymatic activity; maintain elasticity and the right level of humidity; avoid the proliferation of bacteria; improve and prolong the organoleptic properties of the product.

These are important aspects for correctly programming production without forgetting health and hygiene safety, especially when preparing cream-based products in the cooling phase.

The advantage of granular or flake/scale ice made with the ice makers in the Ice-Tek line is that it is easy to handle and weigh and has ideal humidity, variable between 0% and 15-25% depending on the model, compact consistency and a pure, bright colour.

But the biggest advantage of optimising the entire work process is the benefit derived from natural preservation of the end product. The brand-new line with the onomatopoeic name Airless, a major technical and professional step up from previous models, is ideal for vacuum packaging, removing air from finished, cooked, pre-cooked or raw pro-

ducts. A modern technique that brings numerous advantages for operators, such as: longer food shelf life in the counters without using preservatives; quality and nutritional properties remain intact; better hygiene, more efficient services and storage, and less waste.

Conservazione e confezionamento alimentare: “Una questione di qualità”

Con sede a Bologna, in Emilia Romagna, Minerva Omega Group è un’azienda leader nella produzione di macchine per la trasformazione alimentare, grazie anche alla competenza e al know-how acquisiti in 70 anni di attività. Negli ultimi anni, l’azienda ha lanciato due importanti novità: Ice-Tek, una linea di produttori di ghiaccio, e Airless Vacuum Systems, una risposta professionale alle esigenze di confezionamento e conservazione sottovuoto. Linee pensate in modo specifico per il settore della panificazione, della pasticceria e della gastronomia, che vantano eccellenti prestazioni tecniche, affidabilità, autonomia, facilità d’uso e manutenzione.

THE MODELS AND FEATURES OF THE ICE-TEK ICE MAKERS LINE

Construction in stainless steel and food contact materials. R452A gas is used as standard (other gases available on request). Models are available in Compact or Split versions, with air or water condensation.

Gim series for granular ice:

- ice humidity variable between 15 and 20%, at 0°C
- 400/600/1150 Kg/24 h models

Gim N series for mouldable granular ice:

- ice humidity variable between 15 and 25%, at 0°C
- 80/120/270/360/500/750/1000/1500 Kg/24 h models

Fim series for flake/scale ice for rapid cooling:

- subcooled ice between -5°C and -7°C (humidity at 0%)
- 250/400/600/950/1500/3000 Kg/24 h models

www.ice-tek.it



THE MODELS AND FEATURES OF THE AIRLESSS VACUUM PACKAGING MACHINES LINE

www.airlessline.com

Stainless steel body and chamber, thick transparent methacrylate lids. All models are fitted with the Soft Air system for gradual air return into the vacuum chamber and are available in countertop and floor standing versions.

Slam series, the entry line. Essential yet powerful and precise models:

- front sealing bar
- countertop models with 270/310/350/410/460/520 mm sealing bars
- floor standing model with 520 mm sealing bar

Derby series, a higher level of control for more sophisticated packaging:

- standard front sealing bar
- additional sealing bars and double seal/wiring tracks available on request.
- 10 working programs
- analogic vacuum reader
- disposal for vacuuming in external pan available on request

- gas injection kit for protective atmosphere (optional)
- countertop models with 270/310/350/410/460/520 mm sealing bars
- floor standing model with 520 mm sealing bar
- Olympic series, maximum performance and the most advanced electronic system:**
- double seal (two parallel sealing tracks) supplied as standard
- additional sealing bars available on request
- electronic Vacuum control
- extra vacuum function
- 10 working programs
- touch screen colour display
- bluetooth connection to external printer
- bi-active sealing bar (opposite bar installed on the lid) available on request
- disposal for vacuuming in external pan available on request
- gas injection kit for protective atmosphere (optional)
- countertop models with 410/520 mm sealing bars

- floor standing models with 520/600/750/960 mm sealing bars
- 2 models with vertical chamber for packaging liquid/semi-liquid/granular products



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Packaging: happy island

The Italian industry's turnover is expected to increase by a further 6.8% in 2018, at 7.7 billion euros. Export is driving growth, but the Italian market is developing too. The data issued by Ucima.

by Federica Bartesaghi

Packaging: isola felice

È un trend di crescita ininterrotto quello che stanno vivendo i costruttori italiani di macchine per il packaging. Che archiviano il 2018 con un fatturato record di 7.677 miliardi di euro, in crescita di 6,8 punti percentuali rispetto all'anno precedente. È quanto evidenziano gli ultimi dati resi noti dal Centro Studi di Ucima, l'Unione costruttori italiani macchine automatiche per il confezionamento e l'imballaggio, che parlano di risultati importanti sia sui mercati esteri, sia a livello nazionale.

The growth of the Italian packaging machinery manufacturers shows no sign of stopping. According to the preliminary figures published by the Research Department of Ucima (Italian automatic packaging machinery manufacturers' association), the sector's turnover is expected to see further 6.8% growth to 7.7 billion euros in 2018. Both the Italian and international markets have contributed to these results.

A positive outlook that, nevertheless, might undergo some changes starting from this year. "In 2019, we expect to see a slight slowdown in growth," said Enrico Aureli, Ucima's chairman. "According to data processed by our Research Department, orders are expected to grow at a rate of between 1 and 1.5%."



Enrico Aureli

Global scenario

In 2018, exports exceeded 6 billion euros, up by 6.6% on the previous year. According to the latest available disaggregated data relating to the first eight months of the year, the area showing the best performance is North America, with a 27.2% growth. The USA, in particular, has remained

the largest market for Italian technologies with record growth of +35.4%.

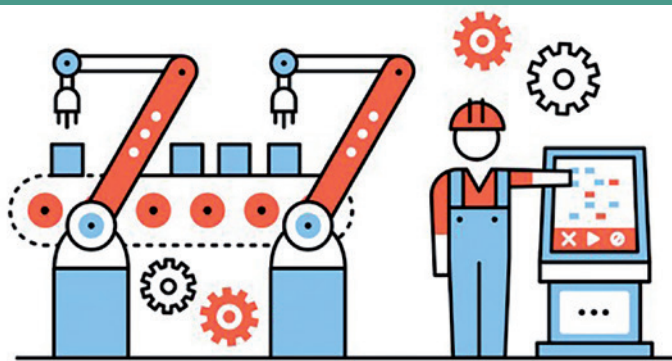
In second place are Africa and Australia (+15.3%), followed by the European Union (+9.6%) and South America (+2.5%). By contrast, there have been falls in exports to non-EU Europe (-5.8%) and Asia (-2.4%). As for the rankings of individual coun-

tries, the USA is followed by France with growth of +3.1% and Germany (+1.5%).

Domestic market

Italy has continued its strong performance in 2018 with revenues of 1.6 billion euros, up by 7.5%. "This is in no small part due to the Industry 4.0 Plan, which has boosted the take-up of our companies' most innovative technologies by Italian customers, although the recovery of the market is another contributing factor," said Enrico Aureli. "However, we are concerned about the economic and social policies pursued by the current Italian government, which pay scant attention to the world of production and risk marginalising Italy on the European stage."

PACKAGING MACHINERY MARKET OUTLOOK



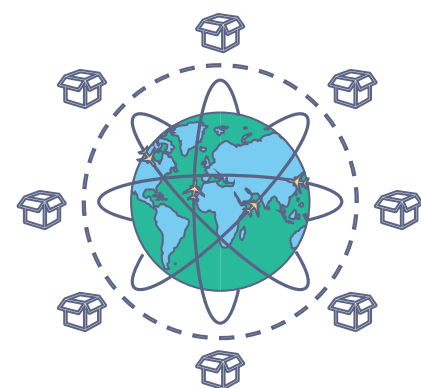
2015-2017 data and estimates 2018

Values in million euro

	2015	2016	2017	Var 17/16 (%)	2018	Var 18/17 (%)
Total turnover	6,197	6,604	7,190	8.9%	7,677	6.8%
Italian turnover	1,194	1,311	1,500	14.4%	1,612	7.5%
Export	5,002	5,293	5,690	7.5%	6,065	6.6%
Import	356	404	454	12.1%	473	4.2%
Export mrkt share	80.7%	80.6%	79.1%		79.0%	
Import/consumption	23.0%	23.6%	23.2%		22.7%	
Employees	27,906	29,644	32,227	8.7%		
Companies	~ 600	~ 600	~ 630			

Source: Ucima's Research Department (December 2018)

FOCUS ON EXPORT



January-August 2018

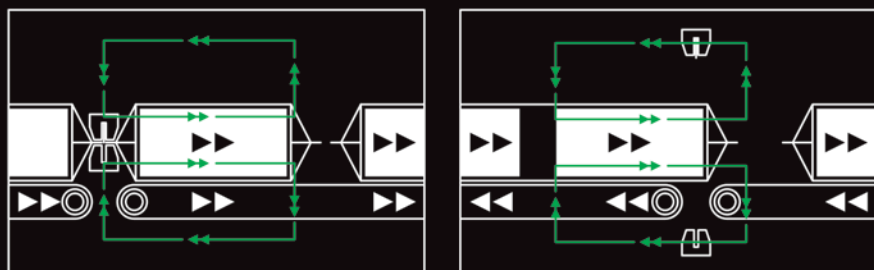
North America	+27.2%
South America	+2.5%
European Union	+9.6%
Africa and Oceania	+15.3%
Asia	-2.4%
Extra-Eu Europe	-5.8%

Source: Ucima's Research Department (December 2018)

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Jobs 4.0

The future of the world of work in a report published by the World Economic Forum.

The opportunities provided by new technologies. And the roles expected to grow, starting from data analysts and scientists, software and applications developers, e-commerce and social media specialists.



by Federica Bartesaghi

The Fourth Industrial Revolution is expected to impact heavily on the global labor market, with strong socio-economic and demographic consequences. We will witness the creation of new professionals who, in part or completely, will replace roles now consolidated. This is highlighted in the 2018 edition of the 'The Future of Jobs', the report published by the World Economic Forum aimed at investigating the evolution of the labor market between 2018 and 2022. Findings achieved thanks to the collaboration of managers and entrepreneurs from 313 companies all over the world, active in 12 different industries, for a total of over 15 million workers involved.

Lavoro 4.0

Il futuro dell'occupazione in un'indagine del World Economic Forum. Che mette al centro i ruoli destinati a prevalere da qui al 2022. A cominciare da data analyst, data scientist, sviluppatori di software e app, specialisti di e-commerce e social media. Lavori strettamente collegati allo sviluppo delle nuove tecnologie.

THE REPORT - KEY FINDINGS

1

Drivers of change

Four specific technological advances - ubiquitous high-speed mobile internet; artificial intelligence; widespread adoption of big data analytics; and cloud technology - are set to dominate the 2018-2022 period as drivers positively affecting business growth. By 2022, 85% of respondents are likely or very likely to have expanded their adoption of user and entity big data analytics.

2

Robotization

While estimated use cases for humanoid robots appear to remain somewhat more limited in 2018-2022, a broader range of recent robotics technologies at or near commercialization - including stationary robots, non-humanoid land robots and fully automated aerial drones, in addition to machine learning algorithms and artificial intelligence - are attracting significant business interest in adoption. Robot adoption rates diverge significantly across sectors, but stationary robots are more likely to be adopted by all respondent companies.

3

New geographies

By 2022, 59% of employers surveyed expect that they will have significantly modified how they produce and distribute by changing the composition of their value chain and nearly half expect to have modified their geographical base of operations. When determining job location decisions, companies overwhelmingly prioritize the availability of skilled local talent as their foremost consideration, with 74% of respondents providing this factor as their key consideration. In contrast, 64% of companies cite labour costs as their main concern.

4

Changing employment types

Nearly 50% of companies expect that automation will lead to some reduction in their full-time workforce by 2022. However, 38% of businesses surveyed expect to extend their workforce to new productivity-enhancing roles, and more than a quarter expect automation to lead to the creation of new roles in their enterprise. In addition, businesses are set to expand their use of contractors doing task-specialized work, with many respondents highlighting their intention to engage workers in a more flexible manner. Across all industries, by 2022, growth in emerging professions is set to increase their share of employment from 16% to 27% (11% growth) of the total employee base of company respondents, whereas the employment share of declining roles is set to decrease from currently 31% to 21% (10% decline).



5

The human-machine relation

In 2018, an average of 71% of total task hours across the 12 industries covered in the report were performed by humans, compared to 29% by machines. By 2022 this average is expected to have shifted to 58% task hours performed by humans and 42% by machines. In 2018, no work task was yet estimated to be predominantly performed by a machine or an algorithm. By 2022, machines and algorithms will on average increase their contribution to specific tasks by 57%. For example, by 2022, 62% of organization's information and data processing and information search and transmission tasks will be performed by machines compared to the 46% of today. Even those work tasks that have thus far remained overwhelmingly human - communicating and interacting (23%); coordinating, developing, managing and advising (20%); as well as reasoning and decision-making (18%) - will begin to be automated (30%, 29%, and 27% respectively).

6

'Precious' skills

Among the range of established roles that are set to experience increasing demand in the period up to 2022 are data analysts and scientists, software and applications developers, and e-commerce and social media specialists, roles that are significantly based on and enhanced by the use of technology. Roles that leverage distinctively 'human' skills, such as customer service workers, sales and marketing professionals, training and development, are also expected to grow. Moreover, the demand will grow for a variety of new specialist roles related to understanding and leveraging the latest technologies: AI and machine learning specialists, big data specialists, process automation experts, information security analysts, user experience and human-machine interaction designers, robotics engineers, and blockchain specialists.

7

A reskilling imperative

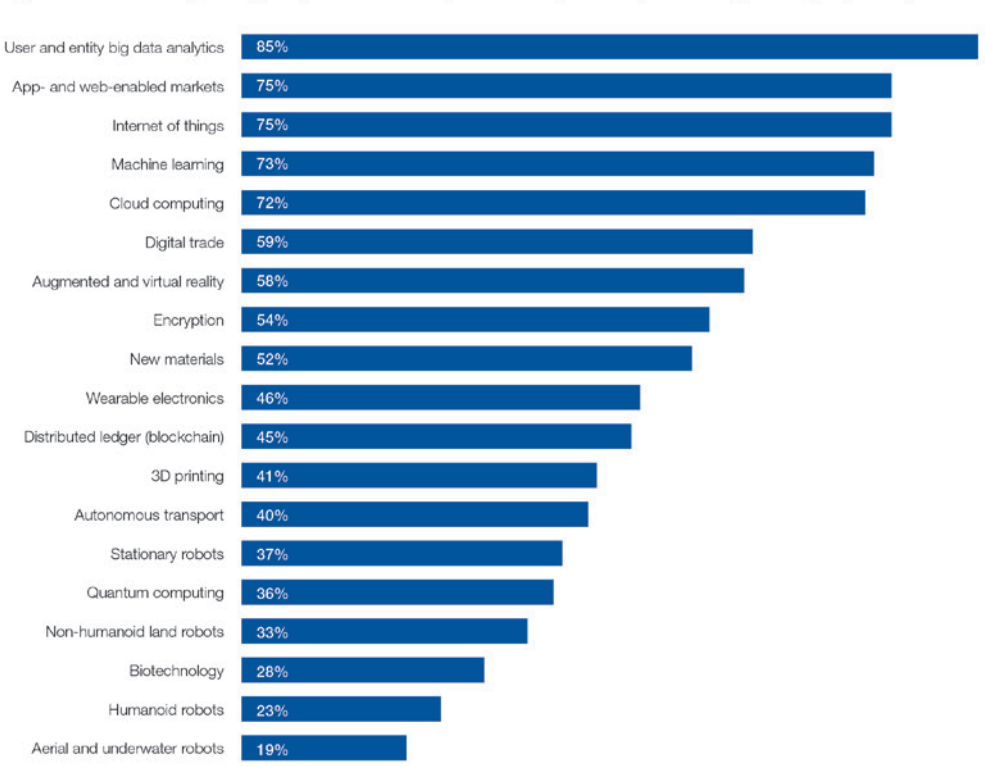
By 2022, no less than 54% of all employees will require significant re- and upskilling. Of these, about 35% are expected to require additional training of up to six months, 9% will require reskilling lasting six to 12 months, while 10% will require additional skills training of more than a year. Employers indicate that they are set to prioritize and focus their re- and upskilling efforts on employees currently performing high-value roles as a way of strengthening their enterprise's strategic capacity. In other words, those most in need of reskilling and upskilling are least likely to receive such training.

8

Addressing skills gaps

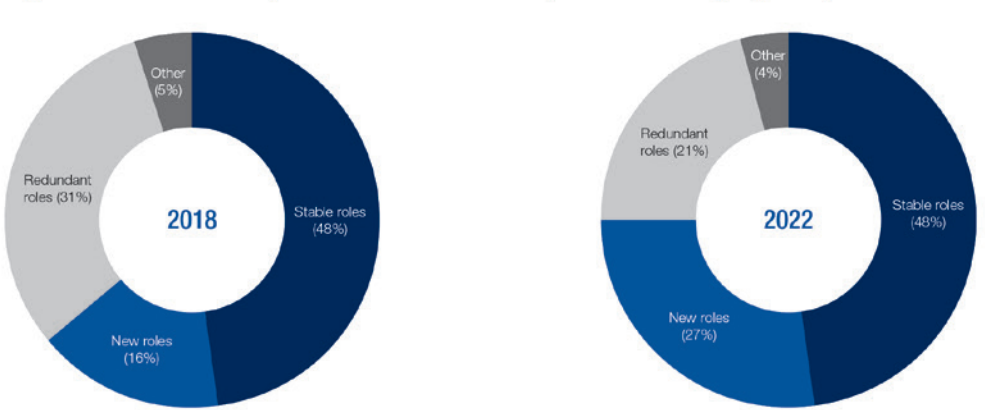
Companies highlight three future strategies to manage the skills gaps widened by the adoption of new technologies. They expect to hire wholly new permanent staff already possessing skills relevant to new technologies; seek to automate the work tasks concerned completely; and retrain existing employees. The likelihood of hiring new permanent staff with relevant skills is nearly twice the likelihood of strategic redundancies of staff lagging behind in new skills adoption. However, nearly a quarter of companies are undecided or unlikely to pursue the retraining of existing employees, and two-thirds expect workers to adapt and pick up skills in the course of their changing jobs. Between one-half and two-thirds are likely to turn to external contractors, temporary staff and freelancers to address their skills gaps.

Figure 2: Technologies by proportion of companies likely to adopt them by 2022 (projected)



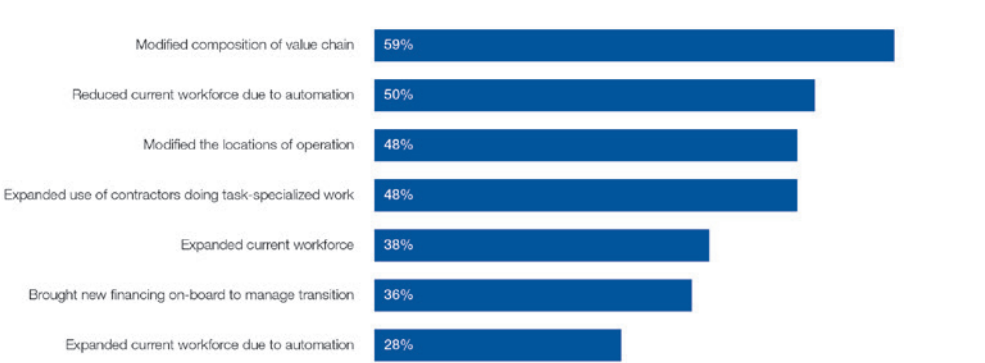
Source: Future of Jobs Survey 2018, World Economic Forum.

Figure 3: Share of stable, new and redundant roles, 2018 vs. 2022 (projected)



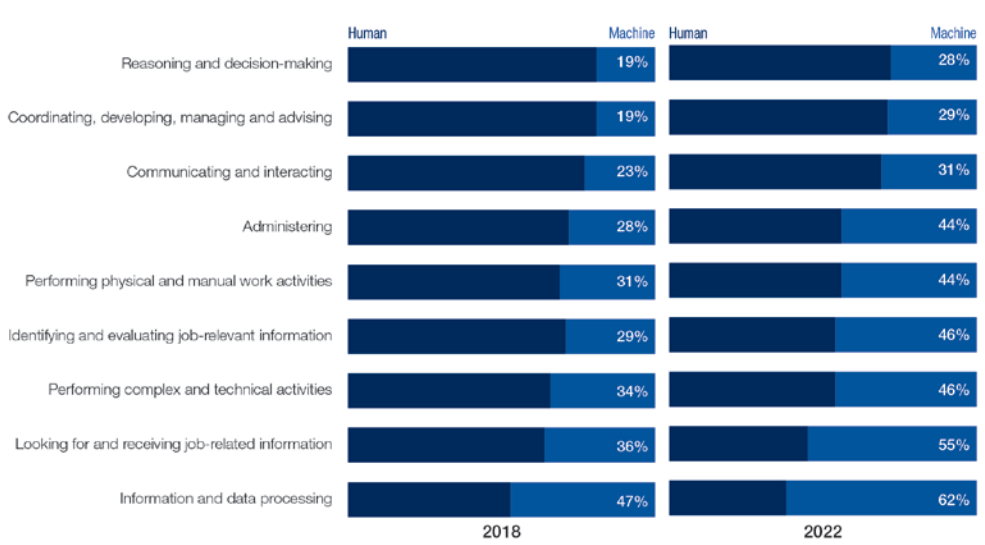
Source: Future of Jobs Survey 2018, World Economic Forum.

Figure 4: Projected (2022) effects on the workforce of current growth strategy, by proportion of companies



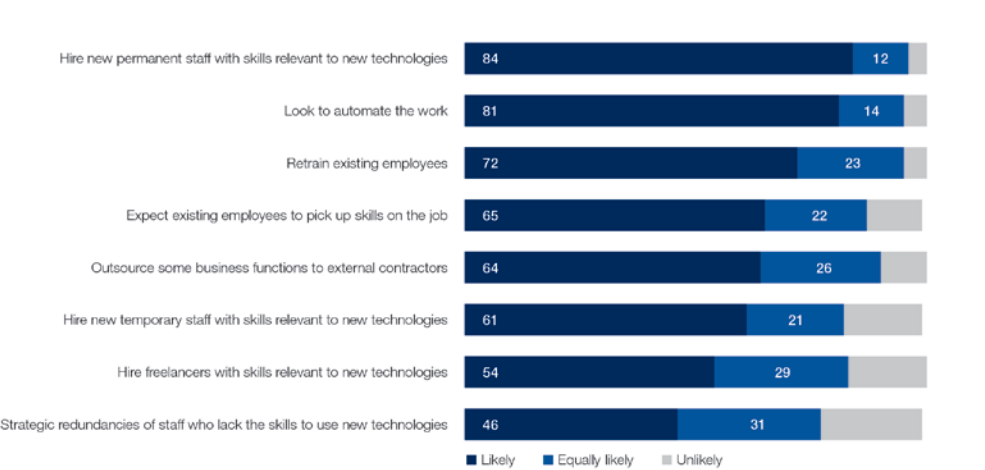
Source: Future of Jobs Survey 2018, World Economic Forum.

Figure 5: Ratio of human-machine working hours, 2018 vs. 2022 (projected)



Source: Future of Jobs Survey 2018, World Economic Forum.

Figure 6: Projected (2022) strategies to address shifting skills needs, by proportion of companies (%)



Source: Future of Jobs Survey 2018, World Economic Forum.

Note: The bars represent the proportion of responses by companies that stated that specific strategies were likely, equally likely or unlikely. Some companies abstained from answering the question. In such cases part of the bar remains blank (typically, 0-1% in the graph above).



France's largest food factory will run from March 12th to 14th in Rennes. 1,600 exhibitors and 22,000 visitors expected. Focus on packaging, ingredients, equipment and processes.

by Federica Bartesaghi

Created in 1997 in the French city of Rennes, at the heart of Brittany, the Cfia (Carrefour des Fournisseurs de l'Industrie Agroalimentaire) brings together every year all the major French and international players in the food industry. The event, now in its 23rd edition, brings together an exclusive offer divided in three categories: ingredients & intermediate food products, equipment & processes, packing & conditioning. After the success achieved in 2018, with 1,450 exhibitors and 20,316 visitors, Cfia 2019 will expand into a new hall. This year's exhibition will feature a 45,000 m² space for professionals in the sector to find opportunities and build relationships. This expansion will reconfigure the exhibition's layout, now able to welcome more than 150 new exhibitors.

Management, production, quality/hygiene, safety/environment, maintenance, new works, r&d, procurement, packaging, logistics, sustainable development, marketing/advertising, sales, etc... Cfia offers a 360° vision of the processing sector. Visitors will find a top-notch offer that includes specialised suppliers for all stages of production.

Why Brittany?

Food processing remains the region's largest economic engine: Brittany is the n.1 agricultural region in France and the n.1 industrial sector in terms of turnover, the number of companies, and employment (43% of companies, and one third of manufacturing jobs). In France, the Grand Ouest region receives the most investment, making it a major European hub. Globally, food-processing is the top French manufacturing sector, with 429,079 direct jobs (+4,491 more jobs than in 2016) and a turnover of 180 billion euro (+3.9% over 2016).

The Cfia plays a key role in this dynamic, by bringing together all the stakeholders and presenting solutions related to all the stages of the food-processing chain.

La casa dell'innovazione alimentare

Giunta alla 23esima edizione, Cfia si svolge dal 1997 nella città francese di Rennes, nel cuore della Bretagna. Punto d'incontro per gli operatori del settore alimentare, la fiera presenta un'offerta eterogenea suddivisa in tre macro categorie: ingredienti, macchine e attrezzature, soluzioni per il packaging. L'edizione 2019 si svolgerà dal 12 al 14 marzo e vedrà la presenza di oltre 1.600 espositori e 22mila visitatori.



CFIA 2019 WHAT TO EXPECT?

1,600

exhibitors (including **150** newcomers)

3

reconfigured hubs to enhance and clarify the offer

22,000

visitors expected

A new

4,000 M²

hall with a hub dedicated to innovation

- The start-up space for the best to come in the future
- Innovation Trophies to value creativity and expertise from our exhibitors
- A pole of advice and experts to answer the challenges of the food industry



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A flourishing business

FoodDrinkEurope's latest report highlights key figures and provides insights on the performance of the f&b sector in the last five years. EU's largest manufacturing industry in terms of turnover, value added and employment.

by Federica Bartesaghi

The 2018 edition of the 'Data & Trends of the EU Food and Drink Industry' report offers a comprehensive picture of the structure and economics of Europe's food and drink sector, the largest manufacturing industry in the EU in terms of turnover, value added and employment. The report provides in-depth analysis of the Single Market, world markets, and a global ranking of top-50 food and drink companies. Here we provide a brief overview of some of the most interesting data in the report.

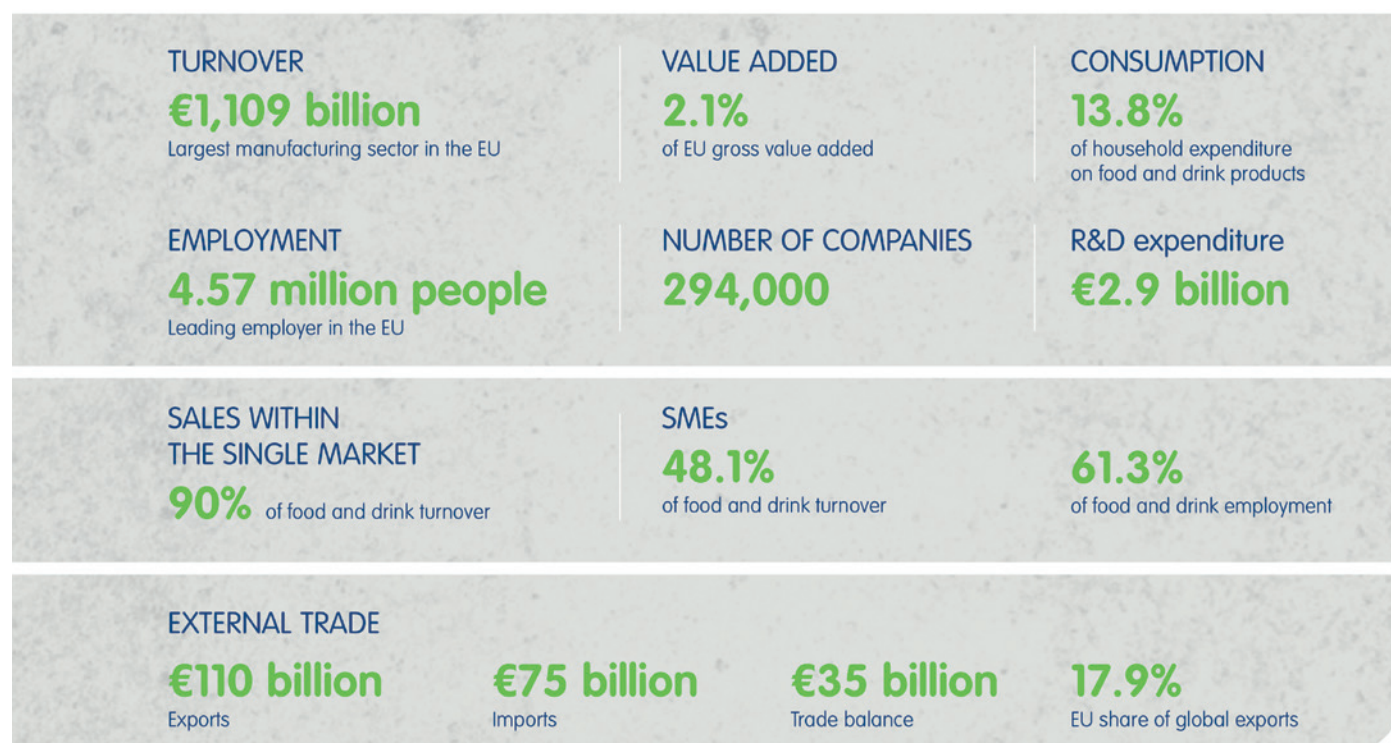
Europe's food and drink industry means 4.57 million people employed throughout the EU, a turnover of 1.1 trillion euro and 230 billion euro in value added, which make it the largest manufacturing industry in the EU (in 2015). In half of the EU's 28 Member States, the food and drink industry is the biggest employer within manufacturing. France, Germany, Italy, the UK and Spain are the largest EU food and drink producers by turnover: together they constitute a 66% market share.

About ¾ of EU food and drink exports are destined to the Single Market. At the same time, the EU is the largest exporter of food and drink products in the world. In 2017, extra-EU exports reached 110 billion euro, with a trade surplus of 35 billion euro.

Food& beverage: un business in crescita

Pubblicata l'edizione 2018 del rapporto di FoodDrinkEurope, che analizza i dati e le tendenze nel settore agroalimentare europeo. L'indagine offre un quadro dettagliato dell'andamento di questa industria, la più grande in campo manifatturiero per il mercato Ue, in termini di fatturato (1,1 trilioni di euro), valore aggiunto (230 miliardi di euro) e occupazione (4,57 milioni di persone impiegate in tutta l'Ue). Ecco una panoramica dei dati più interessanti contenuti nel rapporto.

EU FOOD & DRINK INDUSTRY FIGURES

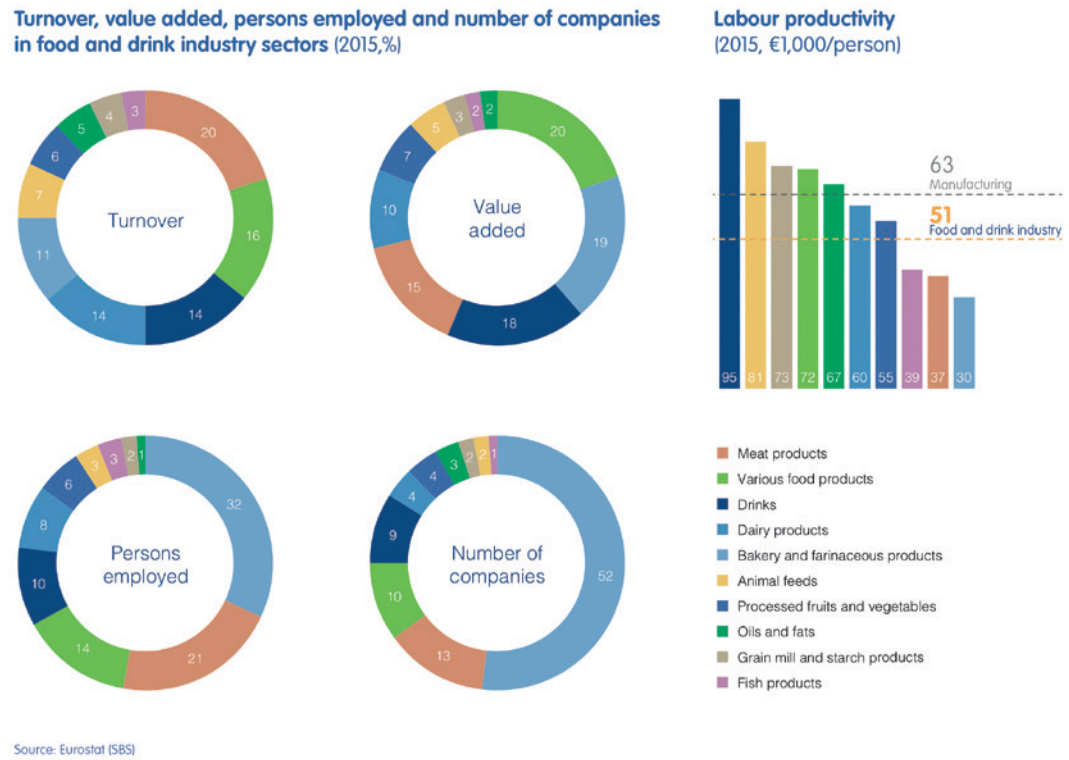


Sources: Eurostat; Joint Research Centre; UN COMTRADE



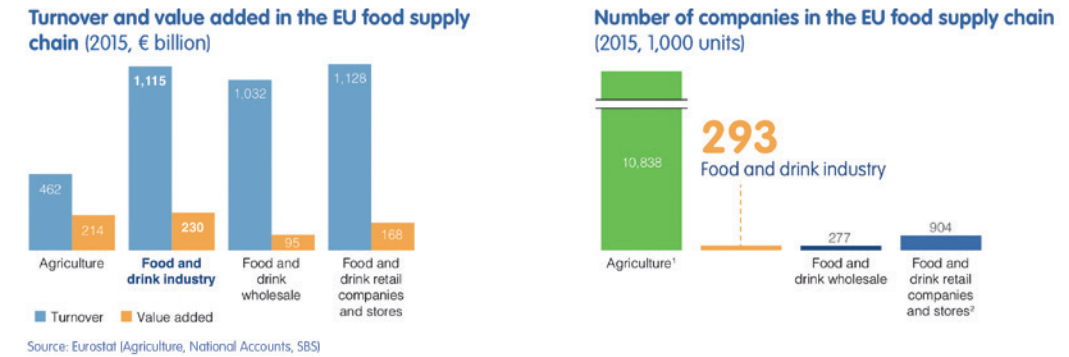
Sector analysis

The EU food and beverage industry is made up of a variety of sectors ranging from fruit and vegetables to dairy production and drinks. The top ten sub-sectors (bakery and farinaceous products, meat and dairy products, drinks and ‘various’ food products) represent three quarters of the total turnover and more than 80% of the total number of persons employed and of companies. Labor productivity varies by sub-sector: for drinks and animal feeds, it is higher than for overall manufacturing.



Food supply chain

In 2015, there were 23 million people employed in the food supply chain. Total turnover amounted to 3.7 trillion euro and value added to 707 billion euro. Around 32 million professionals work in the extensive food supply chain across the EU, from agriculture and the input industry to food and drink services.



EU27 - UK trade

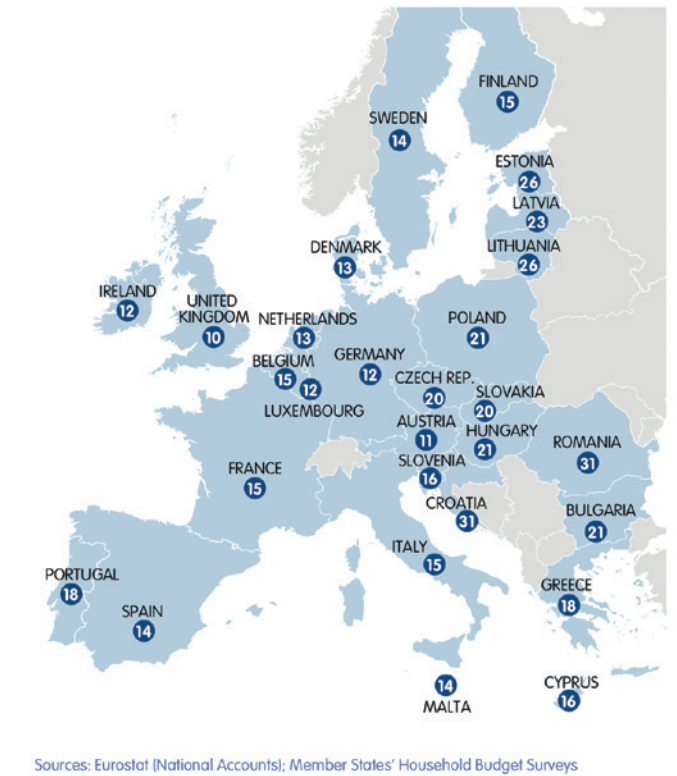
The UK is the largest trading partner of the EU27. In 2017, EU27 food and beverage exports to the UK were worth 32.3 billion euro, while imports from the UK were worth 13.8 billion euro. The trade balance was 18.5 billion euro. Among the EU27 Member States, Ireland has by far the strongest trade link with the UK. Wine is the EU27 most prominent product exported to the UK.



Consumption

In 2016, the share of household expenditure on f&b products remained stable compared to the previous year, at 1,123 billion euro. Across member states, household expenditure on such goods varies from 10% to 31%.

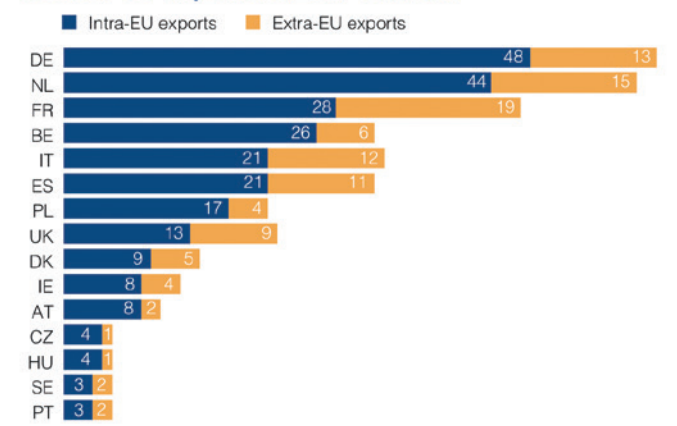
Household consumption expenditure on food and drink products by Member State (2016,% of total expenditure)



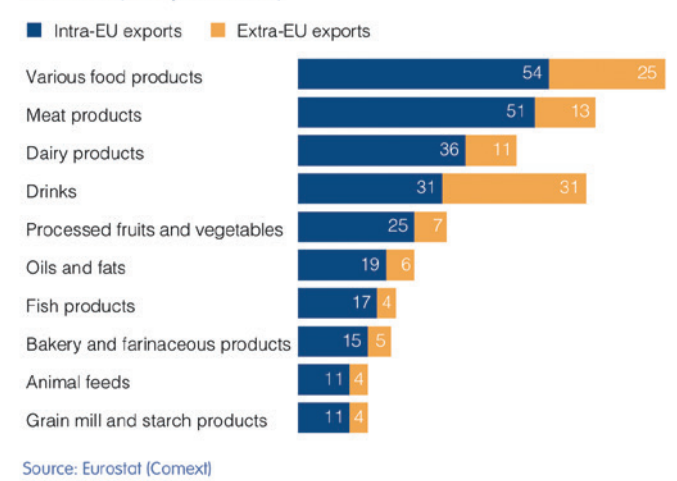
Trade within the Single Market

About ¼ of EU food and beverage exports are destined for the Single Market. Intra-EU exports account for 25% of the turnover, at 273 million euro. Extra-EU exports, instead, are worth 110 billion euro. Total EU exports are worth 383 billion euro. Germany is the first EU exporter and importer of food and drinks within the Single Market.

Intra and extra-EU food and drink exports for the top 15 intra-EU exporters (2017, € billion)



Intra and extra-EU food and drink exports of main sectors (2017, € billion)



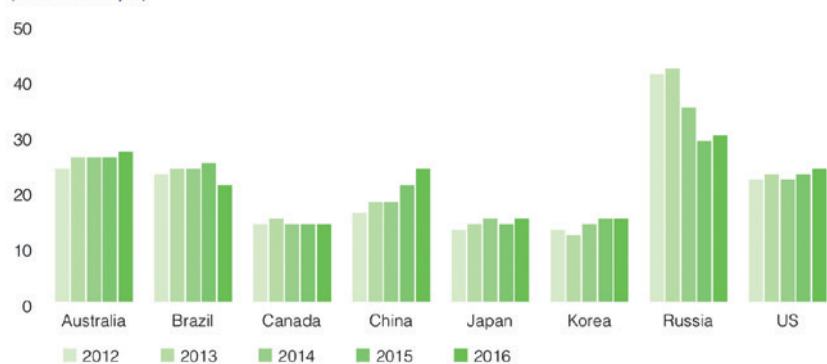
EU food and drink market share

The EU is the number one exporter and the number two importer of food and drink products in the world. In 2016, global exports of food and drinks remained stable compared to the previous year. In 2016, the EU share in global exports reached 17.9%. EU performance on third countries was very positive in China (+8.6%) over the 2012-2016 period.

Top 10 exporters and importers of food and drink products (2016, \$ billion)

Exports			Imports		
EU	1	113	US	1	99
US	2	71	EU	2	80
China	3	52	China	3	48
Brazil	4	38	Japan	4	44
Thailand	5	27	Canada	5	25
Indonesia	6	26	Hong Kong	6	19
Canada	7	25	Korea	7	19
Argentina	8	23	Mexico	8	16
India	9	23	Russia	9	15
Malaysia	10	19	India	10	14
R.o.W.		213	R.o.W.		230

Share of EU products in total food and drink imports of selected countries (2012-2016, %)

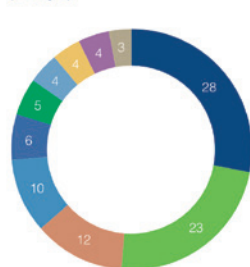


Source: UN COMTRADE

Trade figures by sector

The top 3 best performing exports by sector are: dairy products (+17%), animal feed (+16%), and wine (+12%). The top 3 best performing imports by sector, instead, are: animal feed (+16%), grain mill and starch products (+14%), and beer (+10%). The combined exports of the EU drinks, meat and dairy sectors totaled 55.2 billion euro in 2017.

Contribution of sectors to EU food and drink exports (2017, %)



- Drinks
- Various food products
- Meat products
- Dairy products
- Processed fruits and vegetables
- Oils and fats
- Bakery and farinaceous products
- Animal feeds
- Fish products
- Grain mill and starch products

Source: Eurostat (Comext)

Exports and imports by sector (2017, € million)

	Exports		Imports	
	2017	% change 2016-2017	2017	% change 2016-2017
Drinks	30,619	7	5,936	4
of which: spirits	10,745	5	1,652	8
wine	11,306	12	2,628	-1
beer	3,420	-2	549	10
mineral waters and soft drinks	3,739	8	1,050	6
Various food products	25,145	8	11,795	2
of which: chocolate and confectionery	6,461	3	3,221	-1
food preparations	4,605	10	45	-7
processed tea and coffee	2,291	6	2,215	1
Meat products	13,152	3	6,713	-1
Dairy products	11,477	17	717	1
Processed fruits and vegetables	6,545	6	8,983	-1
Oils and fats	5,833	3	17,229	8
Bakery and farinaceous products	4,587	7	820	6
Animal feeds	4,286	16	1,282	16
Fish products	4,087	9	19,488	5
Grain mill and starch products	3,840	5	2,061	14

International trade

EU food and drink exports increased for the 8th consecutive year to reach 110 billion in 2017 (+8% compared to 2016), while imports amounted to 75 billion (+4% compared to 2016). This makes the EU a net exporter with a positive trade balance of 35 billion euro. More than 1/4 of Member States' food and drink exports were sold to non-EU countries. Nafta remains by far the EU's largest trading partner followed by the China region, Asean, Efta and the Acp countries.

Evolution of extra-EU food and drink trade (€ billion)



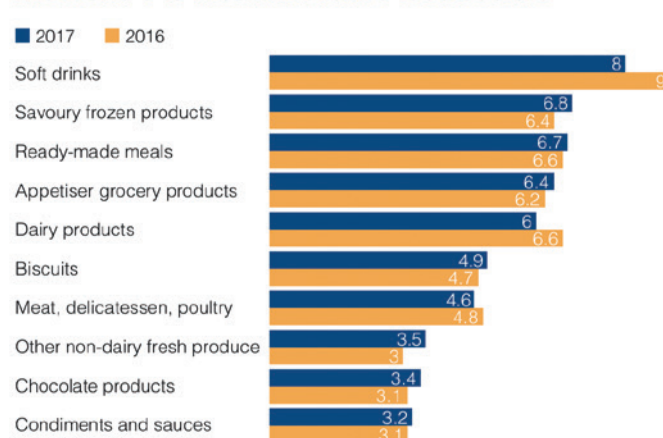
Source: Eurostat (Comext)



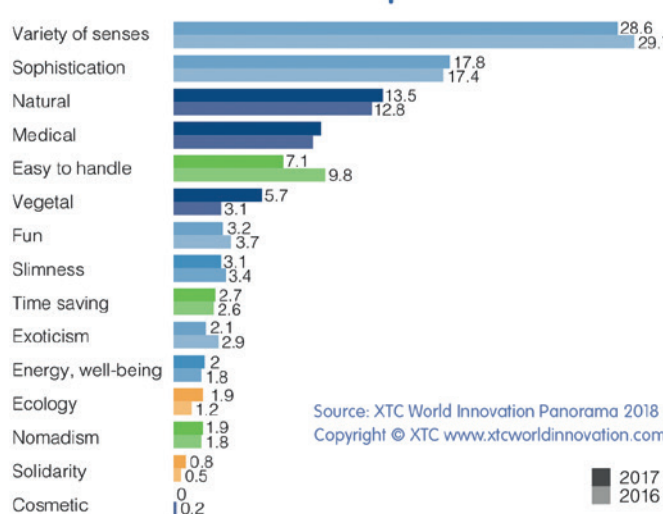
Innovation and consumer trends

Drivers of innovation can be divided into 15 trends, grouped along five areas, corresponding to general consumer expectations: pleasure, health, physical, convenience and ethics. Pleasure is the leading driver, with a 52.8% share in 2017. All the health trends (natural, medical and vegetal) gained ground in 2017. Soft drinks remained the world's leaders in innovation in 2017, just ahead of frozen products, followed by ready-meals.

The world's 15 most innovative food sectors



Food innovation trends in Europe



Source: XTC World Innovation Panorama 2018
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AI Revolution

by Federica Bartesaghi

The role of Artificial intelligence (Ai) in the global economy is a hot topic. This is not surprising given that AI might usher in radical changes in the way people live and work. New research from the McKinsey Global Institute, entitled 'Notes from the frontier: modeling the impact of Ai on the world economy', attempts to simulate the impact of AI on the world economy. The McKinsey Global Institute looked at five broad categories of AI: computer vision, natural language, virtual assistants, robotic process automation, and advanced machine learning.

On a global scale, AI has the potential to deliver additional global economic activity of around 13 trillion dollars by 2030, or about 16% higher cumulative GDP compared with today. This amounts to 1.2% additional GDP growth per year. Overall, the impact of AI might not be linear but could build up at an accelerating pace over time. Its contribution to growth might be three or more times higher by 2030 than it is over the next five years.

If delivered, this impact would compare well with that of other general-purpose technologies through history. Consider, for instance, that the introduction of steam engines during the 1800's boosted labor productivity by an estimated 0.3% a year, the impact from robots during the 1990's around 0.4%, and the spread of IT during the 2000's 0.6%.

AI could widen gaps among countries...

AI may widen gaps between countries, reinforcing the current digital divide. AI leaders - mostly in developed countries - could increase their lead in AI adoption over developing countries. Hence, leading countries could capture an additional 20 to 25% in net economic benefits compared with today, while developing countries may capture only about 5 to 15%. Many developed countries may have no choice but to push AI to capture higher productivity growth as their GDP growth momentum slows, in many cases partly reflecting the challenges related to aging populations. Developing countries tend to have other ways to improve their productivity, including catching up with best practices and restructuring their industries, and may therefore have less incentive to push for AI. This does not mean that developed economies are set to make the best use of AI and that developing economies are destined to lose the AI race. Countries can choose to strengthen the foundations, enablers, and capabilities needed to reap the potential of AI, and be proactive in accelerating adoption.

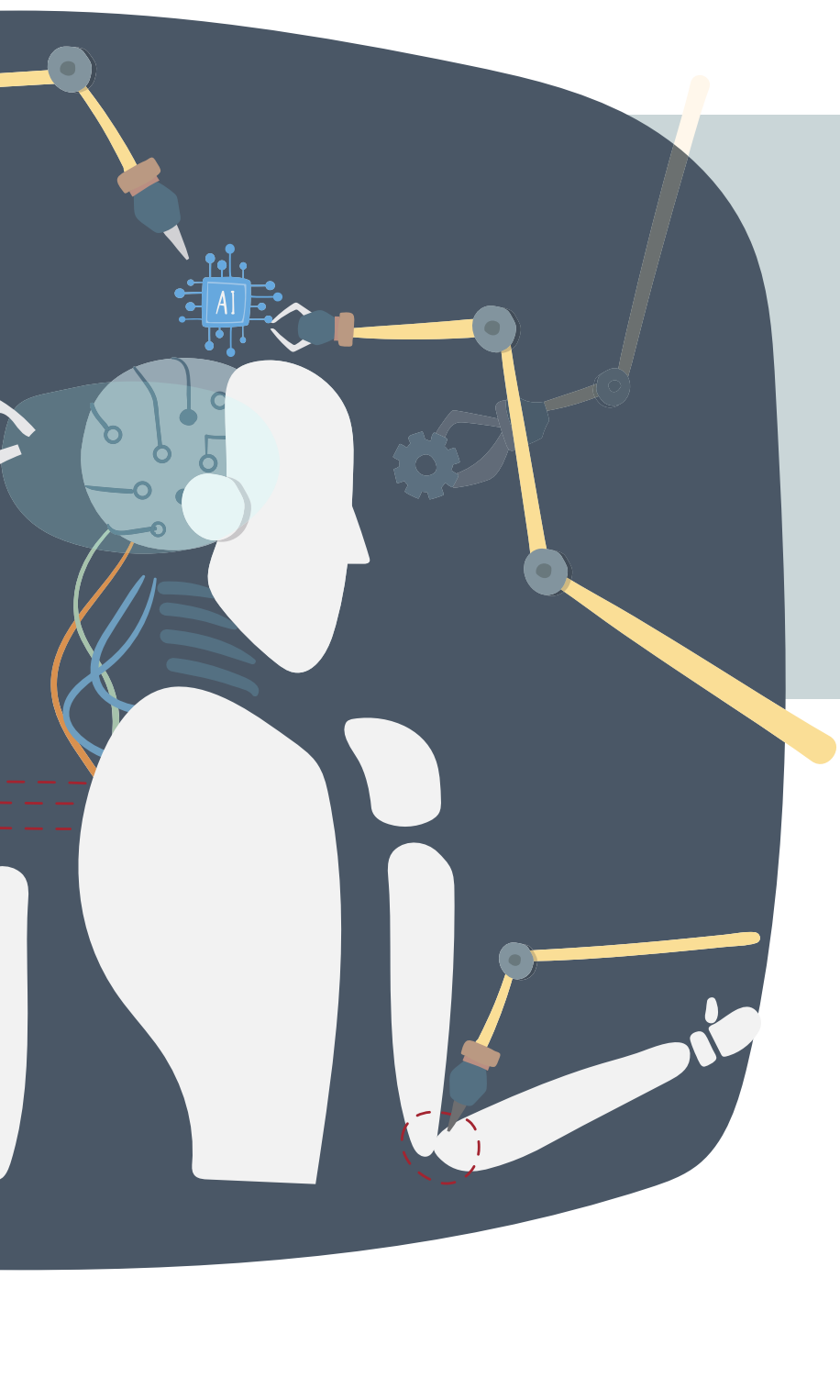
...and companies

By 2030, the average simulation shows that some 70% of companies might have adopted at least one type of AI technology, but that less than

half will have fully absorbed the five categories. AI technologies could lead to a performance gap between 'front-runners' companies (that fully absorb AI tools across their enterprises over the next five to seven years) on one side and 'slow adopters' and 'non-adopters' on the other. By 2030, front-runners could potentially double their cash flow, which implies additional annual net cash flow growth of about 6% for more than the next decade. Front-runners tend to have a strong starting digital base, a higher propensity to invest in AI, and positive views of the business case for AI. At the other end of the spectrum is a long tail of laggards that do not adopt AI technologies at all or that have not fully absorbed them in their enterprises by 2030. This group may experience around a 20% decline in their cash flow from today's levels.

How AI could affect workers

A widening gap may also unfold at the level of individual workers. Demand for jobs could shift away from repetitive tasks toward those that are socially and cognitively driven and others that involve activities that are hard to automate and require more digital skills. Job profiles characterized by repetitive tasks and activities that require low digital skills may experience the largest decline as a share of total employment, from some 40% to near 30% by

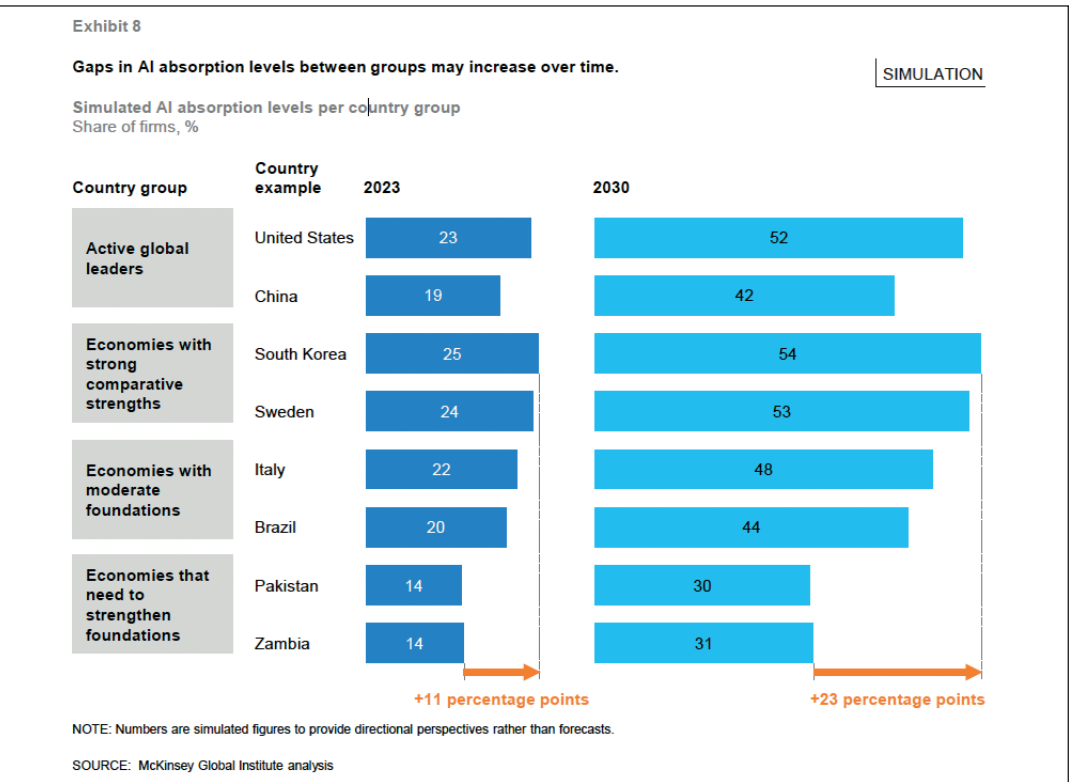
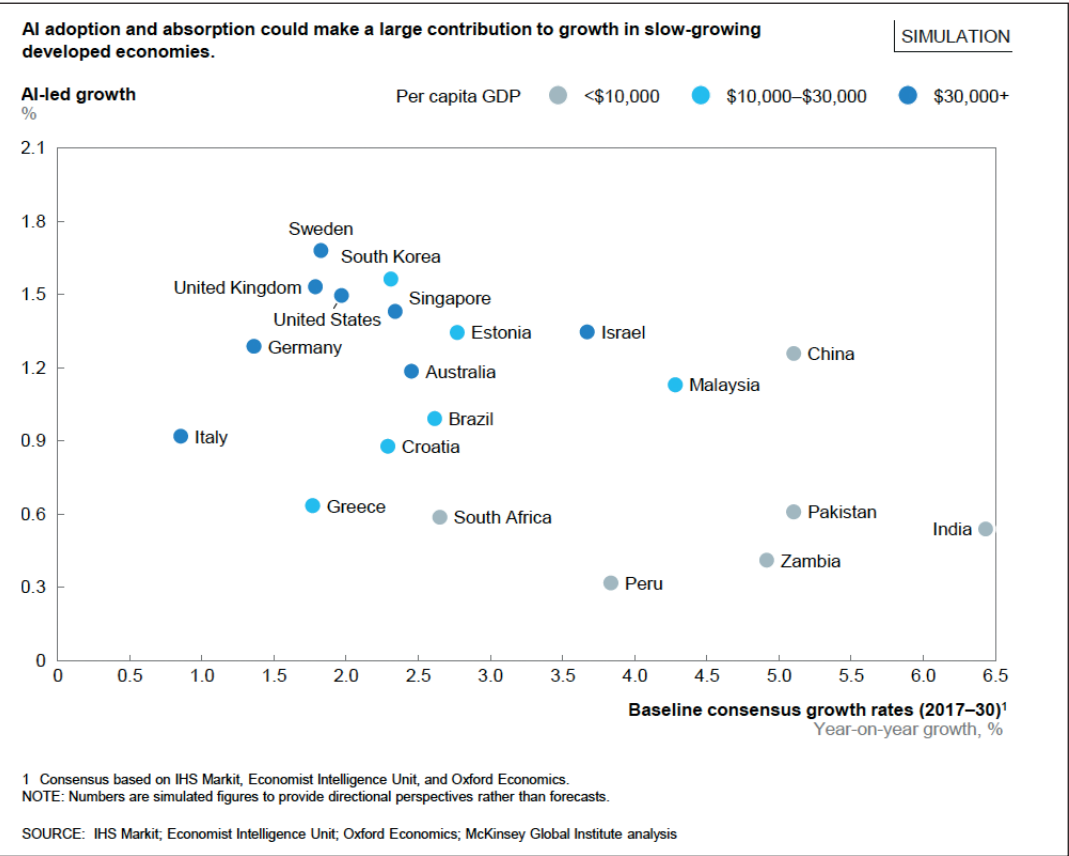


A report issued by the McKinsey Global Institute measured the impact of Artificial intelligence on businesses. It could deliver additional economic output of around 13 trillion dollars by 2030, but widening gaps among countries, companies, and workers.

2030. The largest gain in share may be in non-repetitive activities and those that require high digital skills, rising from some 40% to more than 50%. These shifts in employment would have an impact on wages. According to the report, around 13% of the total wage bill could shift to categories requiring non-repetitive and high digital skills, where incomes could rise, while workers in the repetitive and low digital skills categories may potentially experience stagnation or even a cut in their wages. The share of the total wage bill of the latter group could decline from 33 to 20%. Direct consequences of this widening gap in employment and wages would be an intensifying war for people, particularly those skilled in developing and utilizing AI tools, and structural excess supply for a still relatively high portion of people lacking the digital and cognitive skills necessary to work with machines.

La rivoluzione dell'AI

Entro il 2030 l'adozione diffusa delle tecnologie basate sull'intelligenza artificiale (AI) contribuirà a una crescita del prodotto interno lordo su scala globale stimata in 13mila miliardi di dollari, per un incremento medio annuo dell'1,2% circa. È quanto emerge dal report 'Notes from the frontier: modeling the impact of Ai on the world economy' realizzato da McKinsey Global Institute, che ha preso in considerazione cinque macro cluster tecnologici: computer vision, linguaggio naturale, assistenti virtuali, processi robotizzati e machine learning avanzato.



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JANUARY	Tue 1	Wed 2	Thu 3	Fri 4	Sat 5	Sun 6	Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15
							WINE PROFESSIONAL (AMSTERDAM) www.wine-professional.nl				FOOD & WINE EXPO (GOLD COAST - QUEENSLAND) foodandwineexpo.com.au		WINTER FANCY FOOD SHOW (SAN FRANCISCO) www.specialtyfood.com/shows		
FEBRUARY	Fri 1	Sat 2	Sun 3	Mon 4	Tue 5	Wed 6	Thu 7	Fri 8	Sat 9	Sun 10	Mon 11	Tue 12	Wed 13	Thu 14	Fri 15
						FRUIT LOGISTICA (BERLIN) www.fruitlogistica.de					VINO VISION (PARIS) www.vinovisionparis.com		BIOFACH (NUREMBERG) www.biofach-nuernberg.de		
							FOOD & WINE EXPO (CANBERRA) foodandwineexpo.com.au					IPPE (ATLANTA) www.ippexpo.com			
MARCH	Fri 1	Sat 2	Sun 3	Mon 4	Tue 5	Wed 6	Thu 7	Fri 8	Sat 9	Sun 10	Mon 11	Tue 12	Wed 13	Thu 14	Fri 15
					NATURAL PRODUCTS EXPO WEST (ANAHEIM) www.expowest.com							ANUFOOD BRAZIL (SAO PAULO) www.anufoodbrazil.com.br/en/			
					EXPO ANTAD & ALIMENTARIA (GUADALAJARA) www.expoantad.net		FA' LA COSA GIUSTA (MILAN) www.falacosagiusta.org								
				VINEXPO (NY) www.vinexponeewyork.com		WORLDFOOD POLAND (WARSAW) www.worldfood.pl		SIAF (GUANGZHOU) www.spsinchina.com				CFIA (RENNES) www.cfiaexpo.com			
APRIL	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Mon 8	Tue 9	Wed 10	Thu 11	Fri 12	Sat 13	Sun 14	Mon 15
	AFRICA FOOD MANUFACTURING (CAIRO) www.africa-foodmanufacturing.com		WELLFOOD INGREDIENTS (SAO PAULO) www.wellfoodsummit.com.br/en/				VINITALY (VERONA) www.vinitaly.com			CIBUS CONNECT (PARMA) www.cibus.it					
			INDIA INT. DAIRY EXPO (MUMBAI) www.iideindia.com												
MAY	Wed 1	Thu 2	Fri 3	Sat 4	Sun 5	Mon 6	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11	Sun 12	Mon 13	Tue 14	Wed 15
		www.sialcanada.com						MACFRUT (RIMINI) www.macfrut.com							
						TUTTOFOOD (MILAN) www.tuttofood.it									
						IFFA (FRANKFURT) www.iffa.messefrankfurt.com							VINEXPO (BORDEAUX) www.vinexpo-bordeaux.com		
JUNE	Sat 1	Sun 2	Mon 3	Tue 4	Wed 5	Thu 6	Fri 7	Sat 8	Sun 9	Mon 10	Tue 11	Wed 12	Thu 13	Fri 14	Sat 15
		IDDBA 19 (ORLANDO) www.iddba.org									EXPO PACK (GUADALAJARA) www.expopackguadalajara.com.mx	PROPACK ASIA (BANGKOK) www.propackasia.com			
												MAFBEX (MANILA) www.mafbex.com	FOOD HOSPITALITY WORLD (BANGALORE) www.foodhospitalityworld.com		
JULY	Mon 1	Tue 2	Tue 3	Thu 4	Fri 5	Sat 6	Sun 7	Mon 8	Tue 9	Wed 10	Thu 11	Fri 12	Sat 13	Sun 14	Mon 15
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SEPTEMBER	Sun 1	Mon 2	Tue 3	Wed 4	Thu 5	Fri 6	Sat 7	Sun 8	Mon 9	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15
	SPECIALITY FINE FOOD FAIR (LONDON) www.specialityandfinefoodfairs.co.uk						IBIE (LAS VEGAS) www.ibie2019.com					BIOFACH AWEDICA (BALTIMORE) www.biofach-aWedica.com			
			GASTRONORD (STOCKHOLM) www.gastronord.se			SANA (BOLOGNA) www.sana.it									
			CNR FOOD ISTANBUL (ISTANBUL) www.worldfood-istanbul.com					FINE FOOD AUSTRALIA (SIDNEY) www.finefoodaustralia.com.au							
OCTOBER	Tue 1	Wed 2	Thu 3	Fri 4	Sat 5	Sun 6	Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15
							AGROPRODASH (MOSCOW) www.agroprodash-expo.ru/en/								
						ANUGA (COLOGNE) www.anuga.com									
NOVEMBER	Fri 1	Sat 2	Sun 3	Mon 4	Tue 5	Wed 6	Thu 7	Fri 8	Sat 9	Sun 10	Mon 11	Tue 12	Wed 13	Thu 14	Fri 15
								MERANO WINEFESTIVAL (MERANO) www.meranowinefestival.com					BIOFOOD MADRID (MADRID) www.biofoodmadrid.com		
														NORDIC ORGANIC (MALMÖ) www.nordicorganic.com	
												FHC CHINA (SHANGHAI) www.fhcchina.com			
DECEMBER	Sun 1	Mon 2	Tue 3	Wed 4	Thu 5	Fri 6	Sat 7	Sun 8	Mon 9	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15
		WORLD BULK WINE EXHIB. (AMSTERDAM) www.worldbulkwine.com													
									PACPROCESS MEA (CAIRO) www.pacprocess-mea.com						
										SIAL MIDDLEEAST (ABU DHABI)* www.sialme.com					
										SHANGHAI PRIVATE LABEL FAIR (SHANGHAI) www.plmainternational.com					

FOOD ORGANIC WINE TECHNOLOGIES

* DATES TO BE CONFIRMED

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BANFICONCONSULTING

Events & Exhibitions

IMAGINATION W

SHOWS 2019

TRADE EXHIBITION'S CALENDAR

www.banficonsulting.it



15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
15	Wed 16 ANFAS (ANTALYA) www.anfasfoodproduct.com	Thu 17 FOOD HOSPITALITY WORLD (MUMBAI) www.fhwexpo.com	Fri 18	Sat 19	Sun 20	Mon 21	Tue 22	Wed 23 BIO-BEURS (ZWOLLE) www.bio-beurs.nl	Thu 24 PROPAK PHILIPPINES (PASAY CITY) www.propakphilippines.com	Fri 25	Sat 26 SIRHA (LYON) www.sirha.com/fr	Sun 27 MILLESIME BIO (MONTPELLIER) www.millesime-bio.com	Mon 28	Tue 29	Wed 30	Thu 31
15	Sat 16 TUECA (BOLOGNA) www.tueca.bolognafiere.it	Sun 17	Mon 18	Tue 19 SIGEP (RIMINI) www.sigep.it	Wed 20	Thu 21	Fri 22	Sat 23	Sun 24	Mon 25	Tue 26	Wed 27 ISM (COLOGNE) www.ism-cologne.com	Thu 28 PROSWEETS (COLOGNE) www.prosweets.com			
15	Sat 16 www.biofach.de	Sun 17	Mon 18	Tue 19 DAIRY & MEAT INDUSTRY (MOSCOW) www.md-expo.ru	Wed 20	Thu 21	Fri 22	Sat 23	Sun 24	Mon 25	Tue 26	Wed 27	Thu 28			
15	Sat 16 FOOD EXPO GREECE (ATHENS) www.foodexpo.gr	Sun 17	Mon 18 PRO2PAC (LONDON) www.pro2pac.co.uk	Tue 19 PROPAK VIETNAM (HO CHI MINH CITY) www.propakvietnam.com	Wed 20	Thu 21	Fri 22	Sat 23	Sun 24	Mon 25	Tue 26 PROFOOD TECH (CHICAGO) www.profoodtech.com	Wed 27	Thu 28	Fri 29	Sat 30	Sun 31 AFRICA FOOD MANUFACTURING (CAIRO)
15	Sat 16 PROWEIN (DUSSELDORF) www.prowein.de	Sun 17	Mon 18 IFE (LONDON) www.ife.co.uk	Tue 19	Wed 20	Thu 21	Fri 22	Sat 23	Sun 24	Mon 25	Tue 26	Wed 27	Thu 28	Fri 29	Sat 30	Sun 31
15	Tue 16 VINORUS (KRASNODAR) www.vinorus.ru/en-GB/	Wed 17	Thu 18 FOODTECH (KRASNODAR) www.foodtech-krasnodar.ru	Fri 19	Sat 20	Sun 21	Mon 22 AGRO FOOD OMAN (MASCATE) www.agro-oman.com	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Sun 28	Mon 29	Tue 30 SIAL CANADA (TORONTO)	
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Counterfeit products: detentions on a decreasing trend in Europe

According to a EU Commission's report, customs authorities detained over 31 million fake goods in 2017, for a value of over 580 million euro. Packaging remains in the top 10 of the most affected categories.

by Federica Bartesaghi

Although the total figures have declined since 2016, fake potentially dangerous goods for day-to-day use now make up a much higher proportion of all seizures, accounting for 43% of all detained goods. Overall, the top category of fake goods was foodstuffs, accounting for 24% of the overall amount of detained articles, followed by toys (11%), cigarettes (9%) and clothes (7%).

A yearly report issued by the EU Commission contains statistical information about the detentions made under customs procedures and includes data on the description, quantities and value of the goods, their provenance, the means of transport and the type of intellectual property right that may have been infringed. In 2017, customs authorities made over 57,000 detentions, consisting of a total of 31.4 million articles. The domestic retail value of the detained articles represented more than 582 million euros.

"The EU's Customs Union is on the front line when it comes to protecting citizens from fake, counterfeit and sometimes highly dangerous goods," said Pierre Moscovici, Commissioner for Economic and Financial Affairs, Taxation and Customs. "Stopping imports of counterfeits into the EU also supports jobs and the wider economy as a whole. The European Union stands in support of intellectual property and will continue our campaign to protect consumer health as well as protecting businesses from criminal infringement of their rights."

Countries of provenance

China continues to be the main country of provenance for goods suspected of infringing one or more intellectual property rights arriving in the EU, with a 73% market share. As in former years, Hong Kong, China, Turkey, Vietnam and India remain in the 'top seven'. Syria appears this year in the top five due to large detentions of foodstuff, especially candy. In terms of specific product categories, other countries feature as the main countries of provenance, namely the Republic of Moldova for alcoholic beverages; the United States of America for other beverages; Turkey for clothing; Hong Kong, China for mobile phones and accessories, ink cartridges and toners, CDs/DVDs and labels, tags and stickers; and India for medicines.

Product categories

In 2017 the top categories for detained articles were: foodstuffs, which accounted for 24% of the overall amount of detained articles, followed by toys (11%),

EU SEIZURES AT THE BORDER OF GOODS INFRINGING ON INTELLECTUAL PROPERTY RIGHTS

Top categories by number of detained articles:



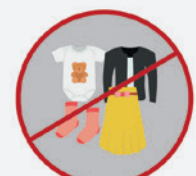
Foodstuffs
24%



Toys
11%

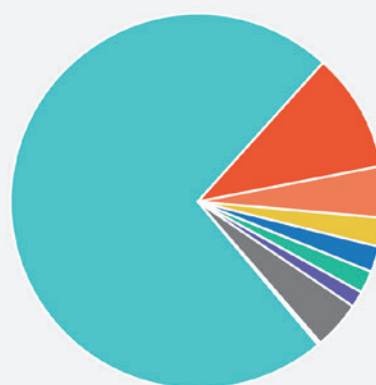


Cigarettes
9%



Clothing
7%

Top countries of provenance:

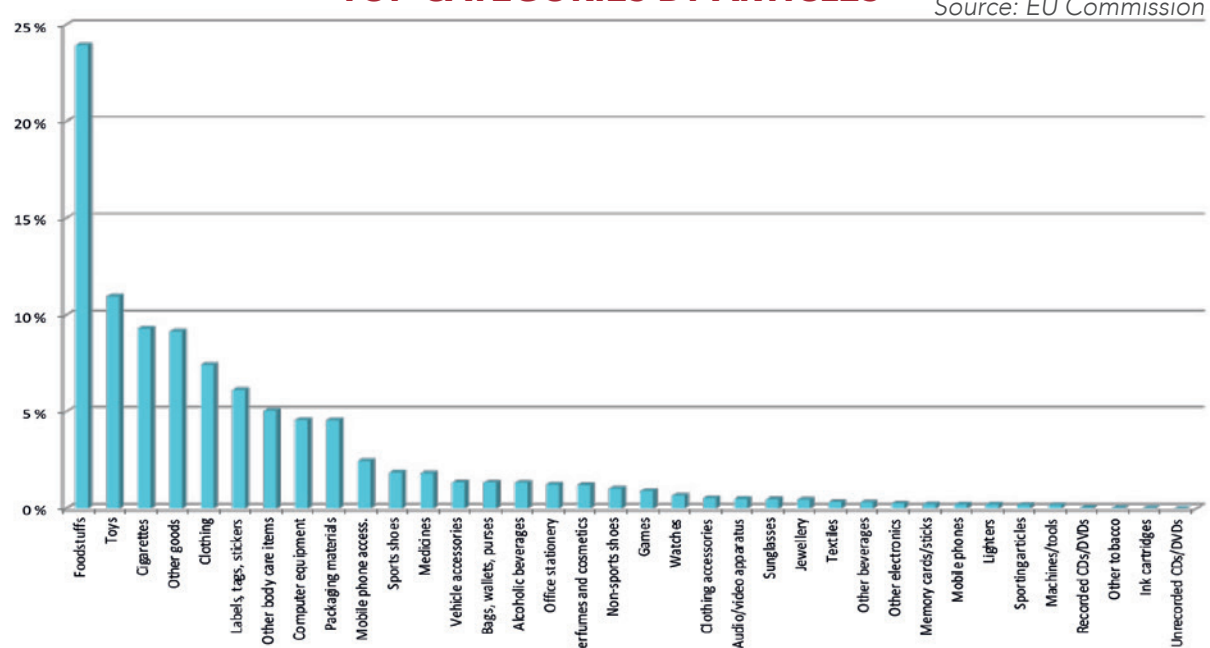


73.04%	China
10.29%	Hong Kong, China
4.31%	All other countries
4.26%	Turkey
2.62%	Vietnam
2.08%	Syria
1.98%	India
1.42%	Egypt

Source: EU Commission

TOP CATEGORIES BY ARTICLES

Source: EU Commission



cigarettes (9%), ‘other goods’ (9%) and clothing (7%). Since 2016, the categories of foodstuffs and cigarettes have switched places in the product category ranking and clothing has replaced packaging material in the top five.

Means of transport

Over the years, postal, air and express transport have remained the most significant mean of transport in terms of the number of cases detained, whereas sea transport by container is the main means of transport for number of articles. The number of detentions in all transport sectors, except express courier and road transportation, reduced. Courier traffic and postal traffic together still accounted for 76% of all detentions. The type of articles detained in the categories of postal and express courier traffic are mainly consumer articles ordered via e-commerce, for example shoes, clothing, bags and watches. In terms of quantities, however, packaging material, medicines and labels are still in the top five. Despite a 27% decrease in articles, sea traffic remains by far the biggest sector. This decrease is heavily influenced by a reduction in the number of detentions of counterfeit cigarettes.

Health and safety concerns

Products for daily use and products that would be potentially dangerous to the health and safety of consumers (i.e. suspected trademark infringements concerning food and beverages, body care articles, medicines, electrical household goods and toys) accounted for 43.3% of all detentions. A significant increase for the second consecutive year, compared to 25.8% in 2015 and 34.2% in 2016.

Customs procedures

In over 89% of all cases, customs action began whilst the goods concerned were part of an import procedure. In more than 7% of cases, goods were discovered whilst in transit, with a destination in the European Union, and in 1% of cases, goods were part of a (re-)export procedure, with a destination outside of the EU. In almost 1% of cases, goods were in transit/transshipment, with a destination in a third country.

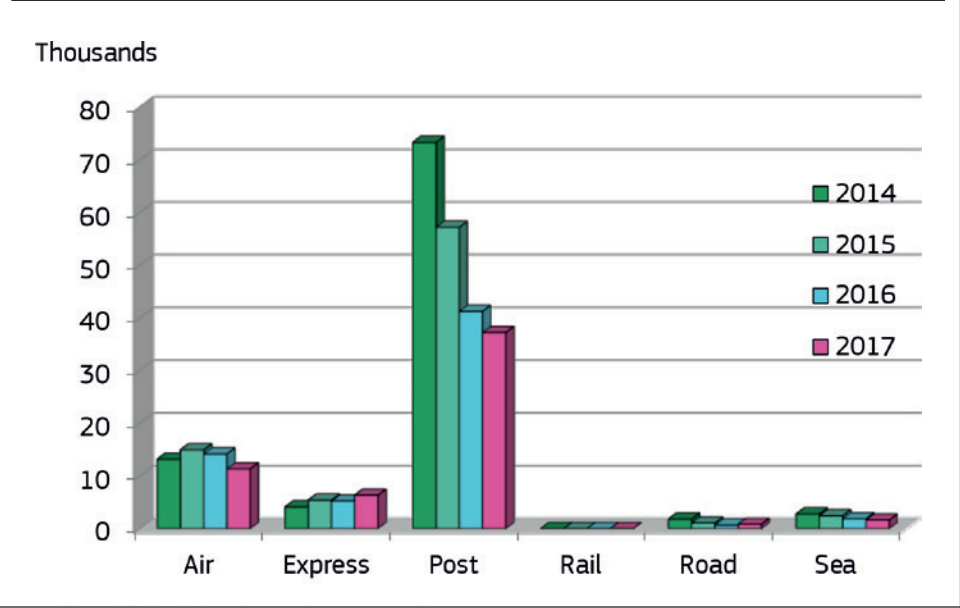
Destruction of goods

In 79% of the detention procedures started by customs, the goods were destroyed after the owner of the goods and the right-holder agreed on destruction. In 10% of the detentions, a court case was initiated to determine the infringement and, in 0.2%, the goods were dealt with as part of criminal proceedings.

74% of the detained articles were destroyed or were subject to court proceedings. However, 24% of the detained articles were released because the right-holder did not respond to the notification sent to them by customs (11%), or the articles were eventually found to be original goods (13%), or there was no infringement situation (0.2%).

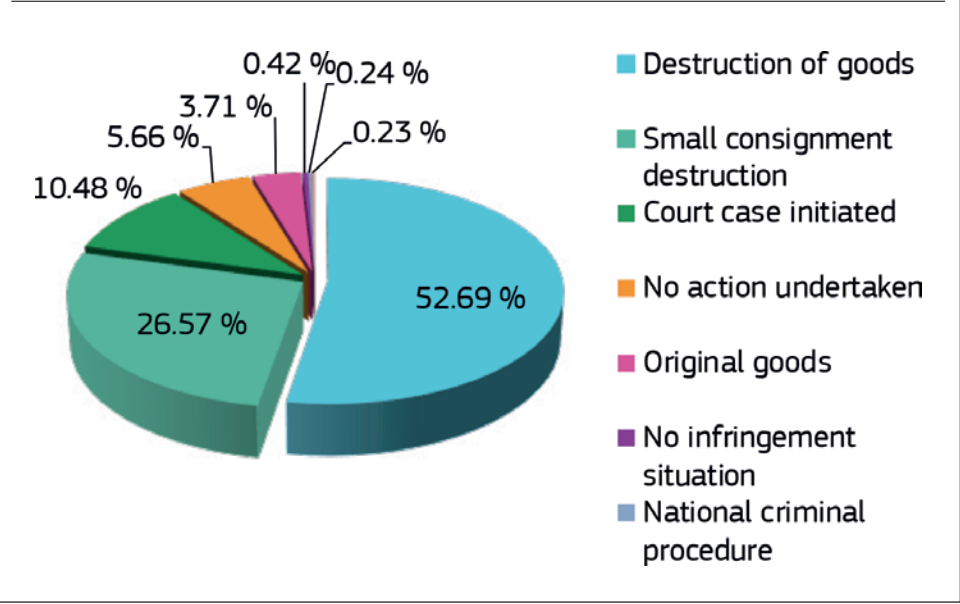


REGISTERED CASES BY MEANS OF TRANSPORT



Source: Report on the Eu customs enforcement of intellectual property rights: results at the EU border, 2017

BREAKDOWN OF RESULTS BY PROCEDURE



Source: Report on the Eu customs enforcement of intellectual property rights: results at the EU border, 2017



Merci contraffatte: calano i sequestri in Europa

È un calo del 24% a volume quello dei sequestri di beni contraffatti e illegali nelle dogane dell’Unione europea, per un totale di 31,4 milioni di pezzi nel 2017, contro i 41,3 milioni del 2016. Il controvalore è poco più di 580 milioni di euro, rispetto ai 672 dell’anno precedente. A riportarlo è una relazione della Commissione europea, intitolata ‘Report on the Eu customs enforcement of intellectual property rights: results at the EU border, 2017’. Di fronte a una buona notizia, un’altra non altrettanto positiva: se è calato il numero di sequestri, è invece aumentata la percentuale di prodotti contraffatti potenzialmente pericolosi destinati all’uso quotidiano, come prodotti food and beverage (24%), per la cura del corpo, farmaci, giocattoli e apparecchi elettrici, che rappresentano ben il 43% dei sequestri complessivi.

BREAKDOWN PER PRODUCT SECTOR

Product sector	Number of procedures	Number of articles	Retail value original goods
Machines and tools	137	51 281	€ 1 075 923
Packaging materials	514	1 429 350	€ 2 330 259

OVERVIEW PER PRODUCT SECTOR OF COUNTRIES OF PROVENANCE

Product sector	Number of articles, not released, in %, according to country of provenance
Machines and tools	China (49.87%), Turkey (29.58%), Czech Republic (16.91%)
Packaging materials	China 80.91%, Hong Kong - China (15.61%), Turkey (2.01%)

Source: Report on the Eu customs enforcement of intellectual property rights: results at the EU border, 2017

What future for global trade?

Protectionism, custom duties, internationalization opportunities for Italian companies. The 2018 edition of the Ice-Prometeia report.

by Federica Bartesaghi

The world trade scenario in the next two years will be positive, although we will face a slowdown in the trade of manufactured goods. In 2018, world trade is expected to grow at a rate of 4.5% at constant prices, 0.3 percentage points less than in 2017 but above the average growth rate experienced over the last five years. The forecasts for the two-year period 2019-2020 portray a decrease of up to 4.1% for 2019 and, only starting from 2020, a new recovery in trade.

This slowdown will be determined, among other things, also by the increasing political and trade tensions that, in recent months, have characterized the global scenario and that will inevitably change the size and direction of trade flows. This has been highlighted in the Ice-Prometeia report 2018, called 'Evolution of global trade by areas and sectors' and presented on the past December in Milan.

A yearly event attended by entrepreneurs and trade associations, chambers of commerce and export managers, interested in understanding the new dynamics that will affect supply and demand on global markets. Major speakers were the president pro tempore of the ICE Agency, Giuseppe Mazzarella, Giuseppe Tripoli, Secretary General of Unioncamere, Alessandra Lanza of Prometeia and Michele Geraci, Undersecretary for Economic Development, connected from Rome.

The comeback of protectionism

In 2018, the world witnessed a new wave of protectionism that involved some of the largest economies. From 2010 until today, more than 3,000 interventions for limiting the trade of goods have been put into place on a global scale: almost 500 introduced by the United States, the first country in terms of number of measures imposed, fol-



lowed by India and Russia (about 300 each). The most affected industrial sectors were metals and automotive.

It is also worth noticing which country has been most affected by such impositions: China. A country that, in the last months, has instead shown a greater level of openness, publicly reaffirming the importance of liberalism in international trade.

Another chapter is that of custom duties. The average world level of duties on manufactured goods has fallen by about two percentage points between 2001 and 2017, passing from 9% to 7%. However, the decrease was entirely achieved in the first decade. From 2010 until today, the average duty rate has settled: a clear sign of how the economic crisis has led to a slowdown in the opening of markets. Increased reductions in duty levels were observed in emerging markets, with a 7.5% drop in China and a 20% drop in India. Overall, custom duties are increasing for consumer goods, typically those most protected by governments in order to enhance the domestic market. On the other hand, the lowest levels of duties are related to productions with high technological content, for which trade between countries is heartily welcomed. The number of non-tariff barriers is also on a rising trend: 548 new barriers to trade were established in 2018 (they were 397 in 2017, 215 in 2010).

So, are we on the eve of a global trade war? Probably not, at least according to the analysis of Prometeia. Indeed, some countries are starting to understand the potential costs of such a war, that could lead to a 1.70% drop in world trade and a 0.60% reduction in world GDP.

New trade policies

What we really need to understand are the reasons behind this



NEW IMPORTS
FOR EACH MARKET
IN BILLION EURO (2020 VS. 2018)

USA	+204.4
CHINA	+128.1
GERMANY	+104.8
INDIA	+46.4
VIETNAM	+45.6
UNITED KINGDOM	+43.4
FRANCE	+41.6
SOUTH KOREA	+36.8
JAPAN	+34.3

Source: Prometeia

WORLD IMPORTS FOR EACH SECTOR

	Values 2017 (mln euro)	% total	% change at constant prices			
			2017	2018	2019	2020
Total imports of manufactured goods	12,460,381	100.0	4.8	4.5	4.1	4.7
Food&beverage	861,418	7.0	4.9	2.6	2.8	3.8
Fashion	861,673	6.9	2.7	3.8	3.5	4.4
Furniture	148,502	1.2	2.9	4.0	3.7	3.8
Home appliances	112,949	0.9	6.5	5.6	5.0	5.9
Pharmaceutical chemistry and for consumption	671,937	5.4	4.4	4.9	4.7	5.2
Other consumer goods	421,284	3.4	4.3	3.6	4.0	4.9
Motor vehicles	1,315,977	10.6	4.8	5.7	5.1	5.7
Trains, airplanes, ships	378,675	3.0	1.0	5.3	6.3	6.9
Mechanics	1,208,685	9.7	7.0	4.0	3.3	3.5
Electromedical and fine mechanics	573,404	4.6	4.0	5.9	5.6	5.7
Electronics	1,924,350	15.4	7.3	5.0	5.0	5.4
Electrotechnics	677,783	5.4	4.3	5.8	4.8	5.0
Building products and materials	168,825	1.4	1.2	3.4	2.2	2.6
Metal products	350,864	2.8	4.8	5.4	3.9	4.0
Metallurgy	1,024,535	8.2	3.9	4.3	3.9	4.5
Chemical intermediates	1,063,415	8.5	4.2	3.4	2.3	3.6
Other intermediates	689,105	5.5	4.2	3.9	3.2	3.6

*refers to the sum of countries considered in the Prometeia-Ice report

Source: Prometeia

Commercio mondiale: quale futuro?

Un report firmato Ice-Prometeia analizza il futuro degli scambi commerciali internazionali, anche alla luce della nuova ondata di protezionismo che sta coinvolgendo le maggiori economie mondiali. In dettaglio, gli scambi di manufatti dovrebbero registrare una lieve diminuzione nel 2019, per poi tornare a crescere a partire dal 2020.

‘latent’ trade war, that we would better call a ‘technological war’. At the basis of this tension is the completely founded US fear of losing its technological leadership. In fact, the US remains the leader in terms of stocks, but China is definitely favored when it comes to new patents: 26% of the new patents registered in 2018 belong to China, only 2% to the United States.

The overtaking of this technological leadership is therefore very close, also because in recent years China has passed from being considered a ‘low quality’ competitor to a country that invests a lot in research and new technologies. And this represents, for the world economies, both a threat and an opportunity. A threat because, besides being the number one producer when it comes to volumes, now China has gained also technological and productive know-how that used to be of exclusive competence of Developed economies; and an opportunity since new collaboration possibilities open up.

“China has become a high-quality competitor for Italy that, in order to stay competitive, now must necessarily focus on continuous innovation and digitization,” underlines Undersecretary Geraci, who has decades of experience in the

Asian country and is responsible for the Italian Government’s Task Force China. “On the other hand, a more intense cooperation with China is desirable in third countries, like Africa, that will play an increasingly important role in the years to come.”

Globalization and new opportunities: focus on US, China and Africa

Today, we find ourselves in a brand-new phase of globalization, characterized by lower imbalances between countries. The “Big emerging” countries are no longer, at this point, properly emerging. But they consistently figure among the top ten world economies. The way countries look at international markets is also changing: they search for medium-long term investments to build relationships, to get to know the tastes of local consumers, and to establish company branches. For Italy, according to the Prometeia report, the biggest growth opportunities in the near future will be located in three countries: the United States, China and - in the medium-long term - Africa.

The United States is and will remain our greatest destination market. If we look in detail at Italian exports of food & beverage products,

the expected growth rate between 2019 and 2020 is 3.6%. But the potential is much higher in this sector: just think that in 2017 our market share only stood at 4.5%.

The Chinese import of food and beverage products from Italy is expected to grow by 7.4% between 2019 and 2020. An important result in a country where, nevertheless, our market share in the f&b sector remains low: 0.8% in 2017 (it was 0.8% in 2015 too). The comparison is quite significant is we consider that France boasts a 5% market share.

Finally, Africa. The first market by population in 15 years. Between 2019 and 2020, imports of food and drinks from Italy will grow by 4.2%. To date, the Italian presence on the continent is stronger in the regions of North Africa. But if on the one hand, this is a limitation, on the other hand, it allows Italian companies to redirect their trade flows according to the demands of the market. A characteristic that pairs well with the recognized flexibility of our industry.

The map of growth

All of the main areas analyzed in the report experienced an increase in imports in 2018, with growth

rates at constant prices of between 3.9% for near mature countries and 5.9% for near emerging countries.

If we consider the different sectors, intermediate goods are the most affected by the slowdown in world demand. Mechanics, the first export sector in Italy, will not exceed a 3.3% growth in 2019 and a 3.5% growth in 2020. The consumer goods sector is performing better, showing a less volatile trend, with the demand for food products expected to increase steadily from 2.6% in 2018 to 2.8% in 2019, up to 3.8% in 2020.

Slight decrease for fashion and furniture that, after the 3.8% and 4% growth rate experienced in 2018 respectively, in 2019 will grow at a slower rate (+3.5% and 3.7%) according to forecasts, while in 2020 they should start growing again (+4.4% and +3.8%). World imports of chemistry, building materials and metals will record lower growth rates in 2019 with respect to average turnovers. Technological goods are expected to perform much better, above all electronics and products with greater complexity (automotive, nautical, and aerospace the most dynamic). In these sectors, innovation and new digital technologies will play an increasingly central role.

It's a *sweet* world

The Cologne trade fair ground is ready to host the 11th edition of the international supplier trade fair for the confectionery and snacks industry (27th-30 January 2019). Below is a preview of the technological solutions presented by Italian exhibitors.

ProSweets Cologne 2019, for the 11th time staged jointly with ISM, the world's largest trade fair for sweets and snacks, will be staged in Cologne from 27th to 30th January. For the global sweets industry, as highlighted in the forecasts made by some leading research institutes, the economic outlook could hardly be better.

The global chocolate and confectionery processing equipment market is expected to grow at a Cagr of 8% from 2018 to reach about 6.9 billion dollars by 2024, according to ResearchAndMarkets. A stunning growth rate determined by key factors such as the increasing consumer demand for confectionery items, growth in the retail industry, technological improvements, and a growing focus on the safety of both food and workers.

Such growth will be determined, of course, also by the positive trend experienced by the global sweets industry, expected to grow by an average of 4.6% per year by 2021, according to GlobalData. In detail, the global chocolate market was valued at around 103.3 billion dollars in 2017 and is expected to reach about 161.6 billion

dollars in revenue by 2024, growing at a Cagr of around 7% between 2018 and 2024, according to Zion Market Research.

Soft confectionery dominated the global market in 2017, as it is one of the most consumed confectionery products by almost all age groups in all regions as well as it is a key ingredient in many food products. Public awareness about the health benefits of chocolates has also increased, just like the consumers' request for functional dark and sugar-free chocolates. In addition, the increasing acceptance of dairy-free, healthy, and organic recipes for desserts are expected to be main factors in driving the global chocolate market during the period.

Finally, in the analysis of geographic regions, Asia-Pacific commanded the largest share of the global market, also due to the increasing spending power of the local population. The large share of this region is mainly attributed to increasing demand of functional and premium chocolate and confectionery products in emerging and developing countries including India, China, Indonesia, and Thailand. North America, instead, is expected to be the fastest growing region.

Anteprima Prosweets 2019

La fiera di Colonia si prepara a ospitare l'11esima edizione di Prosweets, salone internazionale della subfornitura per l'industria dolciaria e degli snack, in scena dal 27 al 30 gennaio parallelamente a ISM, kermesse di riferimento per il prodotto finito. Nelle pagine seguenti, un'anteprima delle soluzioni tecnologiche che saranno presentate dagli espositori italiani in fiera.



AGRIFLEX

www.agriflex.it

HALL:
10.1
BOOTH:
G 049



THE FLOUR COOLING SYSTEM

Fields of application

Food industry, in particular baked products.

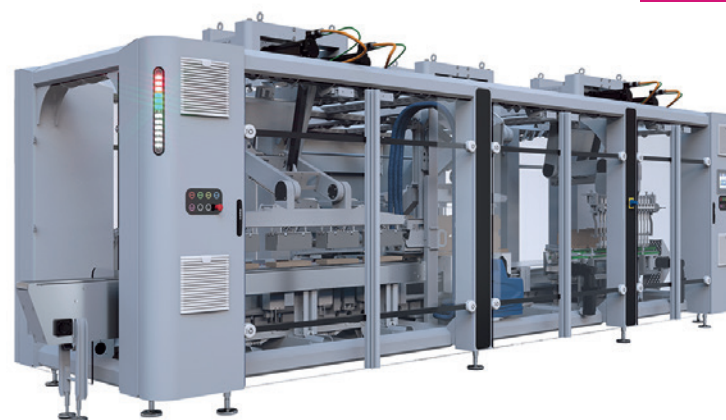
Description and strong points

Dough temperature control is a key factor in obtaining constant and ideal quality in the production of bakery. The cooling process of the flours allows slowing down the rising of the dough and adequately adjusting it to the times of each production line. Agriflex's Flour cooling system - patent nr. 1401347 offers significant advantages: high energy efficiency, thanks to the direct exchange and consequently reduced operating costs; high effectiveness, thanks to the considerable temperature reduction; complete system automation, thanks to the reduced thermal inertia and the absence of accumulations, that ensures the correct temperature of the dough, compensating the temperature variations of the other components and ambient temperature; ease of maintenance, since all areas can be easily cleaned.

CAMA GROUP

www.camagroup.com

HALL:
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BOOTH:
F 008



IF318 MONO-BLOCK

Fields of application

Food (confectionery, bakery, snacking, ready-to-eat) and non-food industry.

Description and strong points

The IF318 mono-block, Cama's flagship model, is a combined excellence of design flair and innovation through technology, encompassing several innovative smart solutions. The machine exhibited at Prosweets is set up for the box erection, flowpacked bars toploading and box closing, showcasing Cama new, heavier duty, faster robots.

Technical information

Other interesting IF318 features include:

- Cama i-Track flexible pitchless system, programmable at every stage, from carton erection, product loading to carton closing
- advanced upgraded robotics
- the 'digital twin', an industry 4.0 solution that allows higher levels of efficiency and performance monitoring
- BT Generation design, with higher hygienic standards, new integrated cable routing system and compact higher standards of electronic control

CAVANNA

www.cavanna.com

HALL:
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BOOTH:
G 071



DELTA ROBOT G44 AND ZERO4 LINE

Fields of application

A wrapping solution, completely based on the vision system with high-resolution linear cameras, is made for delicate products with irregular shape, like croissants.

Description and strong points

The G-44 robotic unit, equipped with 2 Delta arms, takes the croissants transported on a conveyor at 120/150 ppm and places them directly on the wrapper's 'chainless' infeed. The advantages are remarkable: just one manipulation of the products (pick up and deposit); reduced sliding surface; possibility to work with products that can easily vary their dimensions; possibility to have fast changeovers; lower cleaning times, due to a lower number of components installed on the line; just one operator managing the whole line.

The robot unit is complete with a flow-wrapper model Zero4, a medium range wrapper nevertheless able to satisfy the most ambitious requirements. Being part of an automatic wrapping line, the wrapper is equipped with accessories such as the automatic reel splicer and the driven unwinding roller. The electronics is Allen Bradley.

CEPI

www.cepisilos.com

HALL:
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J 011



(The picture shows from left to right: sugar storing silos, sugar mill, conveying line, invert sugar system and metering station)

INVERT SUGAR TECHNOLOGY

Fields of application

Confectionery.

Description and strong points

Cepi produces turn-key systems for the storage, conveying and dosage of raw materials, including full automation and specialized technologies to complete all food processes. The system for the preparation, storage and metering of invert sugar is especially suitable for confectionary goods: invert sugar makes baked goods softer and ice cream products creamier, as well as ensuring a longer shelf life and saving raw materials like sugar and water. The company builds invert sugar systems completely in-house. Cepi's systems also cover any other needs relating to the treatment of sugar, with hygienic and safe storing, conveyance and fine metering equipment, as well as Atex conform sugar mills with automatic feeding of crystal sugar.

Technical information

Invert sugar system comes with both heating device and a cooling unit to stabilize the process. It includes production tank, storing tank, exchanger fed by refrigerant (glycol or water), temperature check with sensors, weighing cells and manual or automatic feeding from the line. Tanks are double jacket, or heated, or insulated.

COLUSSI ERMES

www.colussiermes.com



HALL:
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BOOTH:
F 070

CHOCOLATE MOULD WASHERS DRYERS

Fields of application

Chocolate, bakery, confectionary.

Description and strong points

Washing systems for chocolate moulds, automatic and highly versatile, designed to optimize production processes in the chocolate industry. They ensure effective and accurate washing and perfect drying, preserving the integrity of the mould even after frequent cycles. The chocolate mould washing systems are completely tailor-made and provide the best results in terms of hygiene, certified by constant monitoring compliant with Haccp standards.

Main pluses: possibility of washing various shapes and types of chocolate moulds, of different heights and sizes, without needing to change the format; perfect washing and drying, for immediate re-use in the production process; significant savings of energy, water and detergent; reduction in maintenance costs and times; available in several models based on the potential required and any space limitations.

Technical information

- structure in stainless steel with thick insulated panels to prevent the dispersion of heat produced by the mould washing process
- washing programs designed to obtain maximum energy efficiency
- high pressure to remove all types of stubborn residue or dirt

GAMI

www.gamitaly.com



HALL:
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C 078 - D 079

ONE SHOT

Fields of application

Chocolate machines, chocolate tempering machines.

Description and strong points

The 'One-Shot' dosing machine allows to realize delicious chocolate pralines and filled products in just a single operation. Thanks to the exclusive OneShot technology, the dosage of chocolate for the shell and the dosage of chocolate (cream, caramel or any other suitable filling) for the filling are simultaneous. That means a deep and objective saving of costs and time. Moreover, a graphic interfaced state-of-the-art software allows an intuitive knowledge for an easy operation use of the machine, which is equipped with a specific recipes menu in order to choose the product to obtain. The materials used, such as anodized hardened aluminum and stainless steel, are high quality materials. Every part of the machine is easily and fast to remove in order to be washed in dishwasher machine and to minimize the time required for the change of production.

Technical information

- bowl capacity: 6 kg each
- hourly capacity: 60/70 kg/h
- dimensions: mm 1170 x 740 x 1360h

GORRERI

www.gorreri.com



HALL:
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BOOTH:
F 060

TURBOMIXER TECHNOLOGY

Fields of application

Turboemulsifier for the preparation of cream, whipped cream, sponge-cake, batters, chiffon-cake, mousse, lady-finger and much more.

Description and strong points

Gorreri Turbomixer Series (registered trademark) is the range of turboemulsifiers with vertical head without competitors on the market for performance, speed and quality of the finished product. Gorreri Turbomixer is the compact and high-tech solution that combines the practicality of the continuous mixing system with the unique performance of Vertimix Technology, that in few minutes mixes and aerates doughs, creams and mousse without emulsifiers and thickening agents reaching final densities that no other turboemulsifier on the market is able to reach. Available in various models and different capacities to meet the production needs of each single customer.

Technical information

- entirely in stainless steel Aisi 304
- vertical head with Vertimix Technology of different sizes because each product needs a dedicated technology
- automatic control of the density
- automatic control of the temperatures

IMA

www.ima.it



HALL:
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BOOTH:
F 051

PREXIMA 300

Fields of application

Production of hard candies, gum pellets and pressed mints.

Description and strong points

Everything gained in years of experience and expertise in the industry has been carefully channelled into Prexima, Ima Active's series of tablet press machines. Prexima is the best solution to handle all powdery substances and production volumes both for single and for double layer tablets. Its exceptionally rigid structure guarantees both pre-compression and main compression forces up to 100 kN with maximum reliability. The high yield motorization makes Prexima suitable also for low melting and heat sensitive products.

M.C. AUTOMATIONS

www.mcautomations.it

HALL:
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G 050



CHOCOLATE WRAPPING MACHINE MODEL OMNIA⁶

Fields of application

Packaging.

Description and strong points

The Omnia⁶ is suitable for the wrapping of chocolate balls and eggs in styles 'Double Twist' and 'Rolled Aluminium'. Both wrapping groups co-exist in one machine to offer the fastest wrapping style change over available on the market. True cantilever construction to offer the maximum accessibility. Very compact for the minimum floor space needed. The machine offers the flexibility that all our customers require to switch the production in real time.

Technical information

- machine speed: 600 ppm
- product feeding: by means of vibrating hopper

PACKINT

www.packint.com

HALL:
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BOOTH:
C 078 - D 079



CHOCOLATE MACHINES

Fields of application

Chocolate, ice-cream, bakery, confectionery, ingredients.

Description and strong points

Industrial process machines for the production of chocolate starting from cocoa liquor, cocoa butter, cocoa powder, milk powder, sugar with production capacity from 10 to 1200 kg/h.

Supply of complete plants or single machines depending on the requirement. The classic process for chocolate production with two steps of refining and conching is implemented. The company also makes additional machines for the preparation of ingredients and the storage of ready product.

With these machines, you can produce a wide range of products like tablets, chocolates, spread creams, couvertures, etc. Packint also supplies small plants from bean to bar (from 5 kg/h to 150 kg/h) for high quality artisan chocolate production, starting directly from cocoa beans.

Technical information

- for refining we use the low speed ball mill technology, suitable for small productions, achieving a final fineness under 18-20 microns
- for conching we provide vertical rotary conches, with different levels of intensity depending on the product

PFM - PACKAGING MACHINERY

www.pfm.it

HALL:
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BOOTH:
E 009



VFFS MOD. SOLARIS EVO

Fields of application

Food and non-food industry.

Description and strong points

Pfm Solaris Evo is the continuous motion VFFS able to produce up to 7 different styles of packaging, without the need to rotate the cross seal assembly. The continuous motion VFFS machine allows to make pillow bags at 150 packs/minute, block bottom bags with 4 vertical seals at 100 packs/minute, or doy-style bags at 100 packs/minute. It incorporates easy changeover capability, from one pack style to another, in a very short time and with no special intervention.

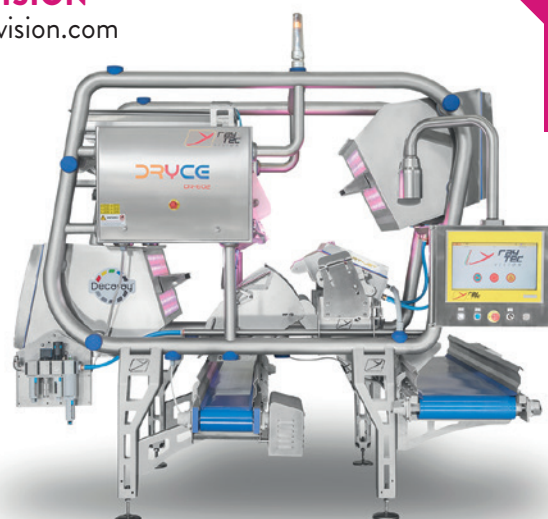
Technical information

With the 'Two-way film concept', the machine is able to form: pillow bag, steelo bag, or block bottom bag, with the film coming from side A; doy-style, with or without zip, or 4 and 3-side sealed pillow bags, with the film coming from side B.

RAYTEC VISION

www.raytecvision.com

HALL:
10.1
BOOTH:
G 081



DRYCE

Fields of application

Optical sorting machine for hard candies, oil coated and sugar coated gummies.

Description and strong points

Dryce is a revolutionary optical sorter for hard candies, oil coated and sugar coated gummies, rejecting all contaminants such as starch, malformed candies, agglomerated products, cross contamination and foreign bodies like wood, metal, plastic. The machine is equipped with the most innovative technologies ensuring accuracy and safety: a double side view with 4 cameras, 12 frequencies pulsed Led light, high 4K resolution, a 3-Way reject system and a smart-jet rejection system. Dryce stands out also for its innovative ultra-clean design complying with Ehedg standards, which dramatically improves sanitation to maximize food safety. Last but not least, it is particularly easy to use thanks to the new Gui software Unyco all-in-one, allowing to monitor the whole activity by means of a single e-board.

Technical information

- water protection IP67
- ultra-clean design in compliance with Ehedg standards
- display 18,5" touchscreen
- remote board connection
- stainless steel structure with safe engineering

follow

SACMI PACKAGING&CHOCOLATE

www.cm-opm.it / www.cm-fima.com

HALL:
10.1
BOOTH:
F 050 - G 059



BETA X2

Fields of application

Chocolate preparation & moulding.

Description and strong points

The Beta X2 vertical tempering machine is the perfect solution for all those customers who need extreme flexibility in tempering chocolate, compound and fatty or spread creams: the Beta X series can be used between 10% to 100% of its nominal flow rate.

It's really compact and ready to use: thanks to the Smart Temp, a patent pending feature, all machine parameters and sectors are automatically adjusted according to chocolate flow rate needed. This will bring more flexibility in the traditional tempering process with huge energy saving, especially with usage of Fast-Shell or similar cold punch technology (i.e. Frozen Cone, Cold Stamp, etc).

Technical information

Available in three sizes, Beta X1, X2 and X4, the Beta series has a capacity from 100 to 4000 kg/h.

SELMI

www.selmi-group.it

HALL:
10.1
BOOTH:
C 041



TUTTUNO ONESHOT, COOLING VERTICAL TUNNEL SPIDER AND AUTOMATIC DEMOULDING

Fields of application

Small-medium chocolate factories.

Description and strong points

The Selmi Tuttuno One Shot depositor is designed to produce filled chocolates in a single operation, including tasting tablets, pralines, spheres and eggs using polycarbonate moulds as well as filled fingers and buttons that are just deposited.

The Tuttuno can be connected to the new Spider vertical cooling tunnel which is extremely compact and can hold more than 110 moulds. It can achieve productivity of up to 4 moulds per minute. Completing the line is Selmi's new Automatic Demoulding attachment. This enhances productivity and efficiency by demoulding pralines or bars from the moulds as they exit the Spider vertical cooling system. It operates at up to four moulds per minute and deposits the finished product onto a belt for feeding packing or flow wrap lines or on a rigid support that avoids manual intervention of the operator.

Technical information

Oneshot Tuttuno: 400 V. trifase - 50 Hz 3,5 Kw - 16 A - 5 poli

Spider Vertical Cooling Tunnel: 400 V. trifase - 50 Hz. 4 Kw - 16 A - 5 poli

Automatic Demoulding: 230 V. monofase - 50 Hz. 1,5 Kw - 16 A - 3 poli

TECNO 3

HALL:
10.1
BOOTH:
D 078 - E 079



Multiprocess C

BEAN-TO-BAR LINE

Product description

It is made up of two compact units specially conceived for small chocolate production capacities. The first one is the Multiprocess R: from the bean to the nibs (roasting, debacterising, winnowing), the line offers excellent results in nut roasting and debacterising. All parts are easily and rapidly disassemblable for sanitization. The second one is Multiprocess C: from the cocoa nibs to the chocolate ready to be moulded (mixing of ingredients, refining and conching), sanitizing and recipe changeover are enabled thanks to the absence of pumps and pipes and the easy disassembly of all the machine parts. The system can also produce pastes from nut and lipid base cream.

TONELLI GROUP

www.tonelli.it

HALL:
10.1
BOOTH:
G 018 - H 019



ASEPTIC PASTEURIZATION PLANT

Fields of application

Bakery, confectionery, gastronomy: creams, mousses, sauces, syrups, jam, jelly, soufflé, ganache and chocolates.

Description and strong points

This pasteurization system consists in a CombiTherMix (cooker - condenser - homogenizer) which realizes the batch pasteurization, the stasis and the precooling and led to a Rat, Aseptic Buffer Tank, where the cream is kept in temperature for next transfer into the CombiAerator Heat Exchanger, where the process becomes continuous with a thermal exchange, cooling, aeration and refining of the cream. The whole plant is completely washed and sanitized with a C.I.P. program which runs sequentially on each junction with washing, rinse, disinfection cycles.

Besides the advantages of pasteurization itself (longer shelf life, better hygienic quality, lighter and smoother creams, use of healthier ingredients), with this system a same recipe is able to give far better results as to quality and organoleptic properties of the final product, as well as financial benefits.

Using the same configuration, but simply changing parameters, it is possible to produce milk creams for snacks filling, even refrigerated, custard creams for croissants or cupcakes, ganache, mousse, jam, jelly, sweet and salty sauces, marshmallow, russian soufflé, zephir, zabaglione, crème brûlée, toppings, etc.

Packaging adds value to goodness



IT ENHANCES
FOOD



IT SHOWCASES
THE PRODUCT



RECYCLABLE
WITH PAPER



PATENTED



SUITABLE FOR
CONTACT WITH FOOD



HEAT-SEALABLE



FRESH-PRESERVER



ECO FRIENDLY



www.esseoquattro.it



coming soon

INTERSCOP

A more and more international appeal

Madrid, 23rd - 26th February 2019

Strengthening internationalisation is one of the strategic aims of the upcoming edition of Intersicop, International bakery, pastry, ice cream show, organised by IFEMA from the 23th to 26th February 2019, at Feria de Madrid. The trade show's organising committee is setting up an interesting program for international purchasers, to facilitate b2b meetings between visitors from foreign markets and exhibitors. Intersicop 2017 exceeded all



expectations, with over 18,000 professionals visiting from all over Spain. In 2019, the organisation has extended the duration of the fair from three to four days, so that the public has more time to discover new products and suppliers, attend technical seminars, watch up to four live national competitions, and learn about success stories in the forum.

www.ifema.es/intersicop_06

DJAZAGRO

North Africa's n.1 exhibition

Algiers, 25th - 28th February 2019

Created in 2003 in Algiers, Djazagro is the leading trade show in Algeria for food manufacturers, with an international and a global offer in five different sectors: process & conditioning, bakery and pastry, food products and beverages, ingredients, food service. In 2019, Djazagro will take place at the Safex Exhibition Park in Algiers, Halls A, C, G and Central Pavilion. Djazagro's exhibitors, producers only, answer to the different needs of more than 20,000 professional visitors, looking for know-how, machineries and



partnerships. The 2018 edition of the show welcomed 740 exhibiting companies from 34 countries and recorded 20,500 entries, including 8% from outside Algeria. Once again, the show was a crossroads for exchange and meetings between the suppliers of machines, equipment and solutions on the one hand and Algerian manufacturers and investors on the other.

www.en.djazagro.com

PROFOOD TECH

Where the processing industry convenes

Chicago, 26th - 28th March 2019

As the second largest market for snack foods, accounting for 33% of market value, North American snacks food manufacturers can find the most comprehensive food and beverage processing technologies and solutions at ProFood Tech, held at McCormick Place, Chicago. Powered by three of the world's trade show leaders - Pack Expo, Koelnmesse (organizer of Anuga) and the International Dairy Foods Association (Idfa) - this biennial pro-



cessing show is unprecedented in its ability to bring the industry together and address the key issues facing food and beverage processing operators in North America. The show will include 7,000 processing professionals and 400 of the world's top suppliers spanning 125,000 net square feet of exhibit floor and 25 hours of blockbuster educational programming.

www.profoodtech.com

New opportunities for growth

Market size, trends, forecasts and growth perspectives for manufacturers of food & beverage packaging and processing machinery. The findings of a survey commissioned by ITA and Cibus Tec.

by Federica Bartesaghi

The Italian Trade Agency (ITA) and the Cibus Tec trade show's organizers have commissioned a market survey on the agri-food industry in the United Arab Emirates, Iran, Oman and Pakistan. The report focuses on key sectors for food & beverage such as dairy, bakery and snacks, mineral water, poultry, fruit and vegetables, and soft drinks. In this first part, we decided to focus on data related to the United Arab Emirates, where on the past November Dubai hosted the 2018 edition of Gulfood Manufacturing (see reportage on page 37). A strategic market for Italian producers of technologies dedicated to food packaging and processing, also in view of a strategic appointment like Expo Dubai 2020.

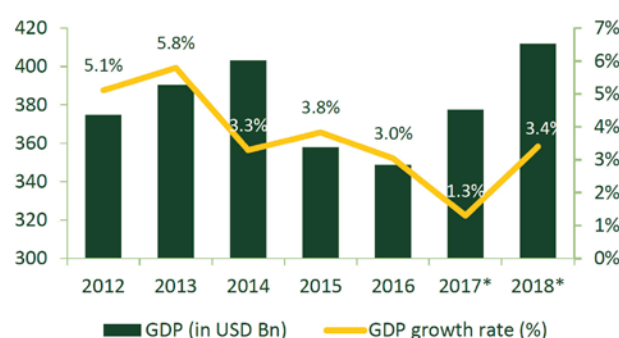
Emirati Arabi Uniti: nuove opportunità di crescita

L'Ice Agenzia, in collaborazione con Cibus Tec, ha commissionato un'indagine di mercato sull'industria agroalimentare di Emirati Arabi Uniti, Iran, Oman e Pakistan. Al centro del report, settori chiave del food & beverage quali lattiero caseario, panificati e snack, acqua minerale, pollame, frutta e verdura e soft drink. In questa prima parte, abbiamo scelto di concentrarci sui dati relativi agli Emirati Arabi Uniti, dove lo scorso novembre è andata in scena l'edizione 2018 di Gulfood Manufacturing Dubai. Un mercato strategico per i produttori italiani di tecnologie dedicate al food packaging e processing, anche in vista di un appuntamento strategico come Expo Dubai 2020.

COUNTRY OUTLOOK ECONOMIC INDICATORS

Economic growth in the UAE declined by 1.3% in 2017 due to low oil prices and fiscal austerity measures. The growth is expected to have bounce back in 2018 on account of investments in the oil field development and planned 5.6% increase in the non-oil sector. Growth in manufacturing, new energy market, agriculture, and tourism is likely to support further economic growth. Inflation rate is estimated at 4.2% in 2018 as compared to 2.0% during the previous fiscal year. Rise in inflation was driven by a sharp rise in the prices for various product categories such as food and soft drinks, transport, communication, textile, clothing and footwear, healthcare, and tobacco.

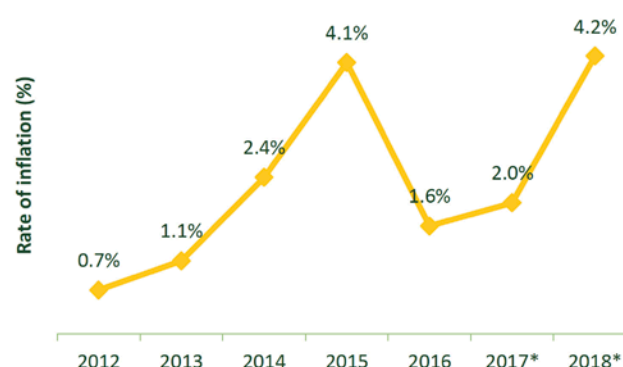
Y-O-Y GDP AND GROWTH RATE (2012-18)



Note: *Estimated value

Source: Arabian Business, Gulf News, Trading Economics, United Arab Emirates Ministry of Economy, World Bank, World Population Review, Worldometers, United Nations World Population Prospect, Knoema

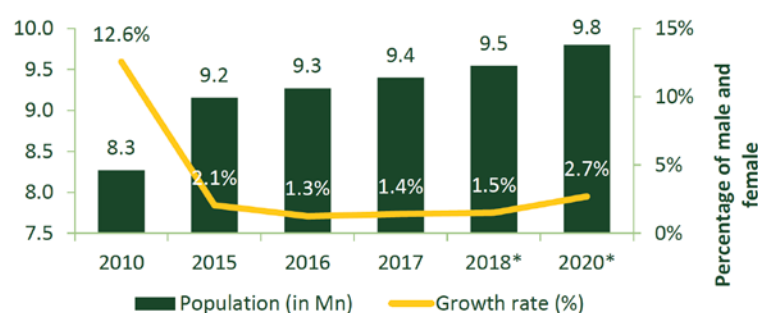
Y-O-Y INFLATION (2012-18)



POPULATION DEMOGRAPHICS

UAE has witnessed a two-fold increase in the population over the 2010-16 period, and in 2018 it is expected to reach 9.54 million (compared to 9.4 million in 2017). Dubai is the largest city by population, followed by Abu Dhabi, Sharjah, and Al Ain. A larger part of the country's population corresponds to expatriates including Pakistanis, Emiratis, Egyptians, Indians, and Filipinos. In 2016, 15-64 was the largest age group in total population in the UAE corresponding to 85.0% of the total population. In 2016, 13.9% of the UAE's total population was aged 0 to 14 years. Percentage of males as compared to females has declined during 2010-17 and is expected to decline further by 2020. The UAE also has the highest gender imbalance in the world with a male/female ratio of 2.2, or 2.8 for the 15-65 age group. Male life expectancy is 76.8 years, while female life expectancy is 79 years.

POPULATION SIZE AND GROWTH RATE (2010-20)



Note: *Estimated value

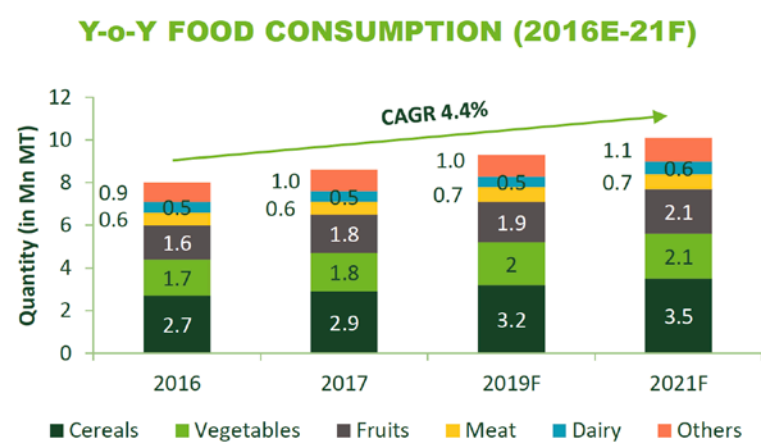
Source: Arabian Business, Gulf News, World Population Review, 2018 Index of Economic Freedom, World Meters, Global Media Insight, City Population, Statista, Gulf Migration, Government of Dubai

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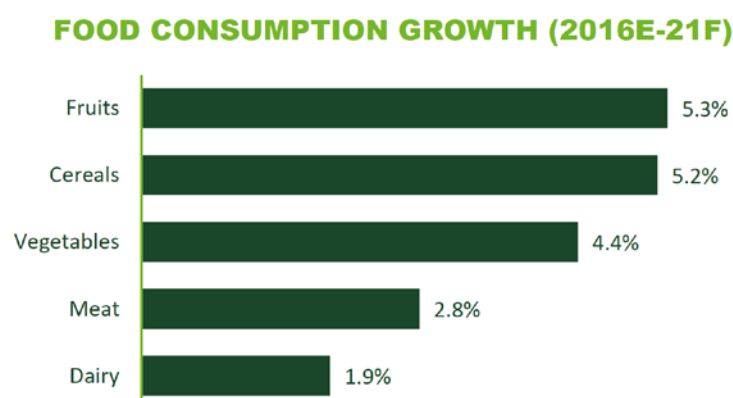
F&B INDUSTRY

The f&b industry in Gcc (Gulf countries) is expected to reach USD 196.0 billion by 2021 from USD 130.0 billion, growing at a yearly rate of 7.1% in 2017. In the same year, the UAE accounted for 31.0% market share (by value) in the f&b sector in Gcc.

The UAE hosts a large and growing number of manufacturers of f&b products, particularly in Dubai. In 2016, the UAE imported ~85.0% of the consumed food and the country became a regional food processing hub. Between 2014 and 2019, the value of f&b imported is forecast to increase by 35.9%. Influx of expatriates and business/leisure visitors are driving demand for packaged foods, a market that grew at an annualized rate of 8.2% between 2010 and 2015 to reach USD 4.3 billion. During the forecast period 2016-2021, food consumption in the UAE is projected to grow by 4.4% to reach 10.1 million MT. Most consumed food categories include cereals, dairy, and fruits & vegetables.



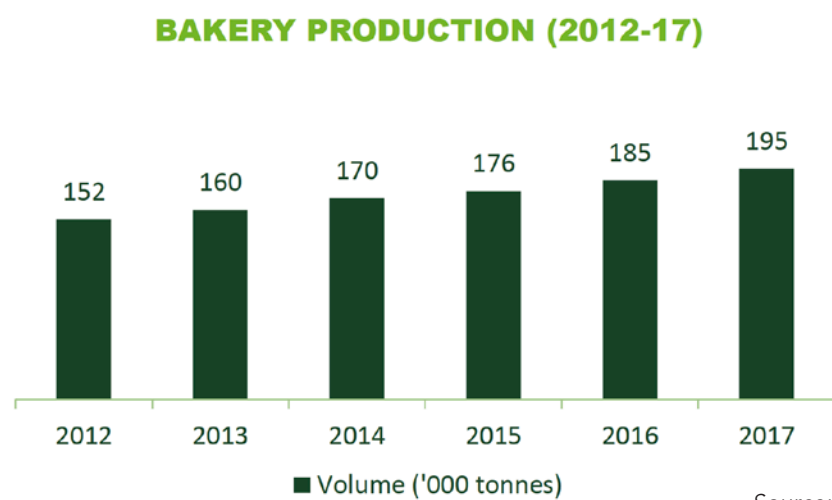
Source: Mena Research Partners, Alpen Capital, News Articles, SGA primary research



ANALYSIS BY SECTORS

BAKERY

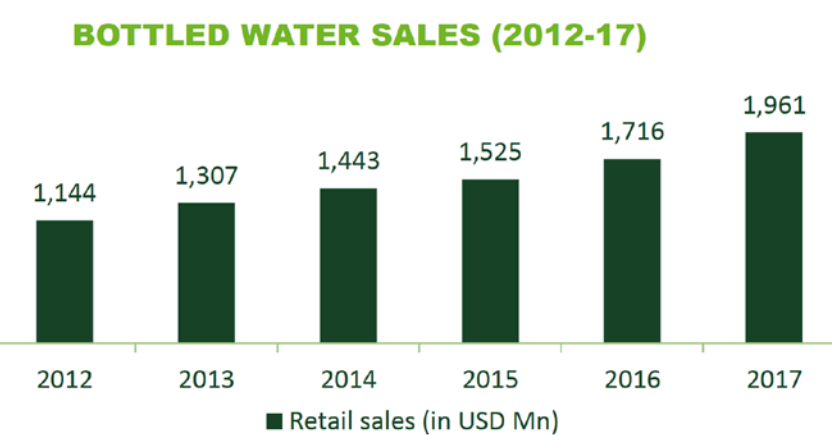
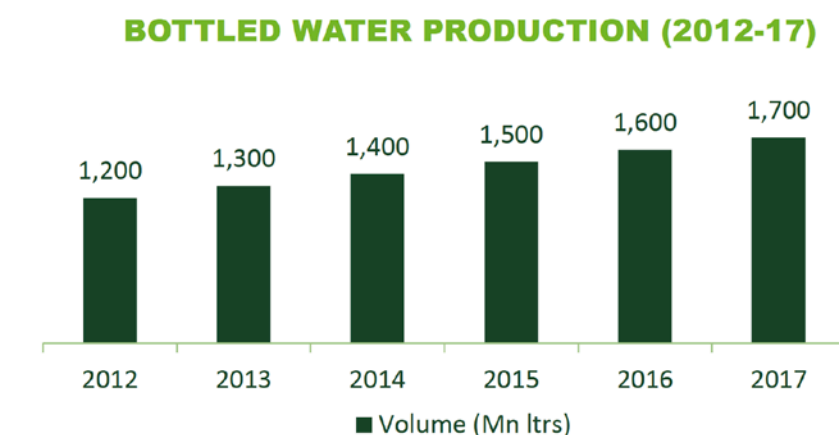
The UAE bakery market was valued at USD 545.0 million in 2017, and is expected to grow at a CAGR of 4% to reach USD 653.3 million by 2022. The bakery & cereals market, instead, is forecast to grow at a CAGR of 6.4% during 2016-2021 and is expected to be worth USD 1,357.8 million by 2021.



Source: Ita

BOTTLED WATER

Bottled water continues to perform strongly due to population growth, hot climatic condition in the country, and growing demand from the health and wellness sector. In 2017, volume of off-trade bottled water grew by 8%, while sales grew by 12.0%. Volume of on-trade bottled water grew by 12.0%, while sales grew by 15.0%. The volume and sales of off-trade bottled water are expected to grow at a CAGR of 9.0% during the forecast period.



Source: Ita



DAIRY

Dairy consumption in the UAE is expected to grow at a CAGR of 1.9% during 2017-2021. Sales of **cheese**, in particular, was valued at USD 326.7 by registering a growth rate of 8.0% in 2017. Cheese sales is expected to grow at a CAGR of 5.0% during 2017-2022 to reach USD 408.4 in 2022. **Other dairy products**, such as laban and cream, recorded an estimated growth rate of 5.0% in 2017 to reach USD 220.0 million. Other dairy products are expected to reach USD 233.3 million by 2022 growing at a CAGR of 1.0% during 2017-2022. Sales of **drinking milk products** grew by 4.0% to reach USD 435.6 million in 2017. Drinking milk is expected to grow at a CAGR of 2.0% during 2017-2022. Yoghurt and sour milk products were valued at USD 408.4 million, growing at 9.0% in 2017, and are expected to grow at a CAGR of 6.0% during 2017-2022.

SNACKS

Savory snacks registered current value sales growth of 15% in 2017 to reach USD 517.2 million, and are projected to post a 10.0% value CAGR to reach USD 816.6 million by 2022. Some of the sector's major brands are Lays, Cheetos, Doritos, Pizza Hut, Le Croissant Shop, Chinatown, Planet Hollywood, Best, Tamrah, Zee, and Tumtum.

POULTRY

The sale of meat products in the UAE is expected to record a CAGR of 7.4% between 2017 and 2021. The UAE's total broiler meat production was of around 47,000 million tons in 2017, a 2% increase from 2016. Sales of processed meat and seafood (by value) increased by 9% in 2017. Chilled processed poultry was the most dynamic product category by value in 2017 with an annual growth of 11%. Processed meat is expected to register a CAGR of 6% to reach USD 408.3 million by 2022. Major brands are Al Ain range of fresh & frozen chicken, Al Ain eggs, Al Rawdah range of chicken products, Siniora range of canned, frozen & cold cut products.

SOFT DRINKS

The value of soft drink sales in the country is estimated to reach USD 2.2 billion in 2018 and projected to surge to USD 2.7 billion by 2021. Major brands are PepsiCo, 7Up, Mrinda.

FRUITS AND VEGETABLES

Sales of processed fruits and vegetables reached USD 114.3 million, growing at 6% in 2017. The processed fruits and vegetables segment is expected to grow at a CAGR of 4.0% over the forecast period (2017-2022). Fresh food sales in the UAE is projected to reach USD 7.9 billion in 2018, and grow further to reach USD 9.3 billion by 2021. Major brands are California Garden, Americana, Al Mazraa.

FOCUS ON

F&B PROCESSING AND PACKAGING MACHINERY

KEY MACHINERY BRANDS FOR SOME F&B CATEGORIES

Preferred machinery brands in the food and beverage categories analysed are European: mainly from Italy, Germany and France. Followed by the United States.

Dairy: dairy companies mainly prefer to purchase European or US machines for key processes. One of the most appreciated brands in this field is Tetra Pak, from Sweden.

Fruits and vegetables: UAE fruit and vegetables companies prefer Italian machines. One example is Robopac, based in the Bologna province.

Snacks: advanced machines of US and Italy are preferred, but Indian and Chinese machines also have entered. The Italian Bionot is one of the most requested brands.

Bakery: selected players are present in this field, mainly from US, Europe and UK. Just to name one of the most appreciated, the US-based Baxter.

Soft drinks (Juice): Italian machines are good for filling and bottling, hence preferred by juice manufacturers in UAE. One example is the Italian company Posimat.

Poultry: US and European companies are preferred, as they are most technologically advanced, like the German-based Magurit.

Bottled water: France's Sidel company is a leader in the bottled water category, used by most local companies.

KEY BUYING FACTORS FOR F&B MACHINES

Good quality and low maintenance costs are definitely two of the most common key buying factors among categories.

AFFORDABLE PRICE

- Companies in UAE tend to have a fixed budget for purchasing a machine, hence compare RFQs giving major role to price.
- Tco (total cost of ownership): manpower needed, cost of maintenance and spare parts is an added expense.

LOW MAINTENANCE

- Companies prefer to have low cost of maintenance, longer free-maintenance contracts and less machine failure.
- Local technical support (no travel expenses).
- Longer warranty period.

QUALITY & EFFICIENCY

- UAE companies prefer European machines as they are highly reliable, rarely breakdown and require less technical support.
- Availability of spare parts through local agency or quickly through airfreight is also a key buying factor.
- Fast technical service support.

PRESENCE IN EXHIBITIONS

- Gulfood Manufacturing is a key exhibition for f&b companies globally.
- Way to keep relationships with suppliers.

OPERATOR-FRIENDLY

- Preference for automatic machines with the least of human interference.
- Machines need to be easy to operate in times of regular maintenance/issues by in-house maintenance team.

FOCUS ON

F&B PROCESSING AND PACKAGING MACHINERY

PERCEPTION TOWARDS ITALIAN BRANDS

According to the survey, Italian machines are mainly preferred by fruit and vegetable companies, while less preferred by bottled water and dairy companies.

WHY? ACCORDING TO RESPONDENTS...

Bottled Water

- Quality of German machines overcomes the Italian one, in terms of speed and durability.
- Local spare-parts availability is better for German brands.
- Italian machines are less efficient in terms of after-sale, compared to German brands who have local representatives in the area.
- Communication issues: change of supplier's management, level of English-language by Italian personnel.

Dairy

- US machines are better at pasteurization.

Fruits and Vegetables

- Italian machines have best value for money compared to German and US machines.
- Less technically complicated than German machines.
- Spare parts more affordable than those for German machines.

SOURCES OF MACHINERY BRANDS AWARENESS

Exhibitions, factory visits and research are key ways to gauge about sources of machinery brands.

- Regular interaction with suppliers at exhibitions.
- Manufacturing factory visits based on prior recommendations.
- Research by sales and production line managers.
- Machinery suppliers or their local agents approach f&b companies.
- Understanding about performance and brands of machines at competitor companies, upon consultation with supplier or acquaintances operating in the sector.

FUTURE PLANS ACROSS SECTORS

Poultry, bottled water, fruits and vegetable companies are the main categories planning to invest in machineries in the near future.

Fruit and vegetables

- Plan for capacity expansion in Dubai and Sharjah, this will lead to requirement for new machines.
- Investment plan of USD 2 million, mainly for upgrading certain parts and make the machines fully automated.

Poultry

- Plans to add new machines in freezer and food processing department. Aim is to increase speed of production.

Water

- Plan to add new machines and introduce new full production lines.



What local f&b companies say...

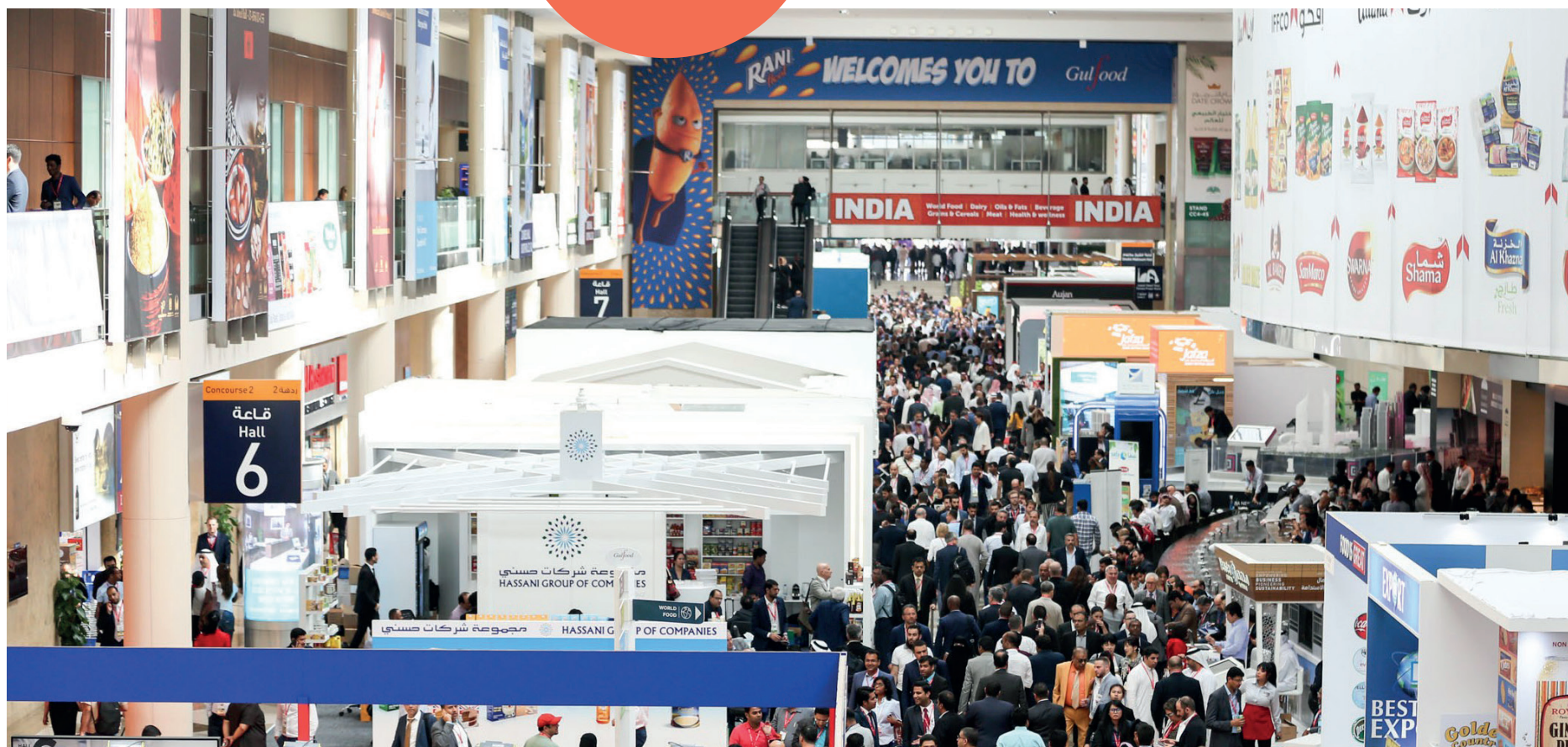
“There’s a lack of agents in the area, for Italian brands. In case of issues we’ve to get personnel travelling from Europe, which is costly.”

“When we look at new machineries purchase plans, the main objective is to increase production capacity, and decrease manpower.”

“We like Italian brands, but in the past some of them were acquired by other brands, and it has become difficult to communicate anytime we have an issue because they have continuous internal-management changes. We look for stable relationships.”

“Italian machines are less expensive than German brands, and easier to use and fix.”

end



The gateway to the Middle East

A successful outcome for the 2018 edition of Gulfood Manufacturing in Dubai. Strategic event dedicated to food technologies in the Mena region. An overview of the Italian companies that attended the show.

by Federica Bartesaghi

After three busy days of business and networking, the 2018 edition of Gulfood Manufacturing - the greatest trade show in the Mena region dedicated to food processing - closed at the Dubai World Trade Center with resounding success. More than 1,600 exhibitors, including a significant number of Italian companies, took advantage of the event to present their latest technological solutions in food packaging and processing.

Dubai: the food business is driving growth

During the first half of 2018, chocolate, nuts, and milk were among the items that contributed to the impressive figures recently reported by Dubai Customs. According to official figures, Dubai's external trade in foodstuff totaled Aed 44.24 billion (around 12 billion dollars) in the first half of 2018. In detail, total imports reached Aed 27.68 billion, exports touched Aed 7.71 billion, and re-exports recorded Aed 8.84 billion.

India was named Dubai's biggest partner in foodstuff trade in the first half of 2018, with Aed 3.84 billion, followed by Iraq (Aed 2.57 billion), the United States (Aed 2.36 billion), and Oman (Aed 1.58 billion). Rice took the lion's share of foodstuff trade with Aed 2.43 billion, followed by milk with Aed 2.13 billion, sugar with Aed 2.02 billion, nuts with Aed 1.71 billion, and chocolate with Aed 1.55 billion.

TECH4FOOD BESIDE ITALIAN COMPANIES IN DUBAI

Striking success at Gulfood Manufacturing 2018 for Tech4Food, Tespi Mediagroup's international magazine dedicated to Italian technologies, distributed at the international press corners during the trade show. Tech4Food is aimed at showcasing Italian companies and products on international markets, and for this very reason is distributed during leading events for food&beverage on a global scale. In addition, due to a partnership agreement signed with the Italian Trade Agency, the digital version of the magazine is sent by all ITA offices around the world to their network of food producers and importers.

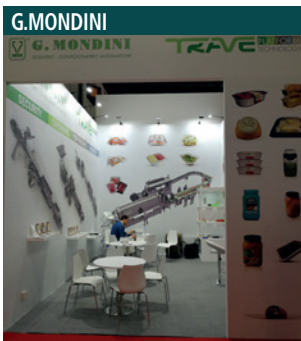


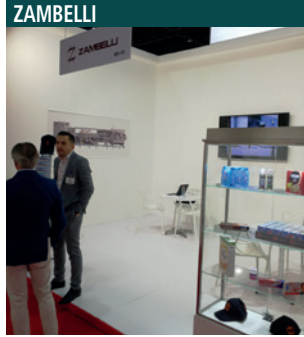
La porta per il Medio Oriente

Si è conclusa lo scorso 8 novembre, dopo tre intense giornate di business e networking, l'edizione 2018 di Gulfood Manufacturing, il più grande evento per l'industria di trasformazione alimentare della regione Mena (Medio Oriente e Nord Africa), in scena presso il Dubai World Trade Center della città emiratina. Più di 1.600 gli espositori presenti, tra cui una nutrita rappresentanza di aziende del Bel Paese, che hanno approfittato della centralità dell'evento per presentare agli operatori del comparto le loro ultime soluzioni tecnologiche in ambito food processing e packaging.

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POSTCARDS FROM DUBAI





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The largest gathering of suppliers for the food industry.