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# THE ITALIAN FOOD MAGAZINE

**BUYER'S • GUIDE**

YEAR 7 - N° 1 • JANUARY 2019  
MANAGING DIRECTOR: ANGELO FRIGERIO

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## EDITORIAL

by Angelo Frigerio, managing director

# SUSTAINABILITY: THE RULE OF THE FOUR C

"We must move away from an obsolete ego-system awareness that focuses entirely on the well-being of the individual - be it a single person, group, organization, or country - to an eco-system awareness that emphasizes the well-being of the whole." This is the definition of sustainability according to Katrin Kaufer, of the Massachusetts Institute of Technology (Mit).

A word, sustainability, that is often mentioned during conventions and enterprise meetings. As if the strategic importance of protecting both human beings and the environment had been discovered all of a sudden. If we apply this definition to food products, we can identify four keywords that describe changes that are currently taking place: Container, Content, Communication, Cost.

The first issue is about packaging, namely the Container. The increasingly widespread use of plastic must be stopped. Land and sea pollution is definitely worsening the state of our planet. The images of dream beaches covered with rubbish and bottles have gone viral all over the world, causing extensive public concern. Also among those who, with their disrespectful behavior, have determined this situation. For this very reason, we need to come up with and put into practice solutions able to substitute current packaging with eco-sustainable alternatives.

The other word is Content. There is no point in de-

signing and manufacturing sustainable packs if we put poor quality products into them. Key elements like animal well-being, antibiotic free, reduced levels of nitrites and nitrates, as well as reduced sugar and salt in product manufacturing must be kept into high consideration. Here is where the future of eating lies: healthy products for healthy people.

Nevertheless, this is not enough if consumers are not informed about sustainability issues. And here comes the role of Communication: something we are all called to participate in. Starting from companies that - in adv campaigns as well as on product packaging - must tell the advantages of both the Container and the Content. The use of dedicated graphic tools can lead to increased awareness of sustainability.

Finally, the Cost. The changes occurring in Container and Content, and Communication as well, determine an objective rise in production costs. At this stage, grocery retailers must play their part, because they can't pretend to sell sustainable items without paying the price. The behavior of some retailers, willing to purchase sustainable items at the same price they pay for conventional products, is ridiculous and counter-productive. Because you can't talk about 'smart shopping' and at the same time increase the burden on companies. There are two possibilities: you choose to support sustainability, or you make fun of people.

## SOSTENIBILITÀ: LA REGOLA DELLE QUATTRO C

*"E' necessario un cambiamento profondo nella coscienza delle persone perché operino non solo per se stesse ma nell'interesse di tutto l'ecosistema in cui le attività economiche si svolgono": questa la definizione di sostenibilità di Katrin Kaufer del Mit di Boston, prestigiosa istituzione accademica statunitense.*

*Una parola, sostenibilità, che ricorre spesso nei convegni e nei vari meeting aziendali. Sembra che si sia scoperto, all'improvviso, che la tutela dell'uomo e del pianeta sia diventata strategica e fondamentale.*

*Applicando la definizione ai prodotti del settore alimentare è possibile individuare quattro parole che descrivono i cambiamenti in atto: Contenitore, Contenuto, Co-*

*municazione, Costo.*

*La prima questione riguarda il packaging, ovvero il Contenitore. L'impiego sempre più massiccio della plastica va fermato. L'inquinamento del mare e del suolo è un fattore scatenante nel deterioramento delle condizioni del pianeta. Le immagini di spiagge da sogno ricoperte da bottiglie e materiale vario hanno fatto il giro del mondo. E scandalizzato tutti. Anche quelli che, con i loro comportamenti irrispettosi nei confronti dell'ambiente, hanno provocato il fenomeno. Per questo occorre studiare e mettere in atto soluzioni che possano sostituire i packaging attuali con altri ecosostenibili.*

*L'altra parola è Contenuto. Inutile studiare e realizzare contenitori se poi ci si mettono prodotti scadenti. Il be-*

*nessere animale, l'antibiotic free, la limitazione di nitriti e nitrati come pure di zucchero e sale nella produzione degli alimenti, sono tutti elementi da tenere in stretta considerazione. Il futuro dell'alimentazione si gioca qui. Prodotti sani per gente sana.*

*Tutto ciò non basta se non si racconta la sostenibilità al consumatore. Comunicazione dunque: un'operazione culturale in cui tutti siamo coinvolti. A partire dalle aziende che nelle pubblicità e sulle confezioni dei prodotti devono spiegare alla signora Margherita (prendo mia moglie come modello di consumatrice attiva) i vantaggi del Contenitore e del Contenuto. Basta con le vaschette di plastica nude e crude. L'utilizzo di strumenti grafici appositi può portare*

*ad accrescere la consapevolezza nei confronti della sostenibilità.*

*C'è poi la questione del Costo. I cambiamenti di Contenitore e Contenuto, come pure della Comunicazione, comportano un aumento oggettivo dei costi di produzione. E qui è la distribuzione che deve fare la sua parte. Non si può pensare a introdurre prodotti ecosostenibili senza pagarne lo scotto. L'atteggiamento di certe catene che vorrebbero acquistarli allo stesso costo dei convenzionali appare assurdo e controproducente. Non si può pubblicizzare la spesa intelligente per poi strizzare le palle alle aziende. Ci si deve decidere. O si sta dalla parte della sostenibilità in modo attivo oppure si prende in giro la gente.*





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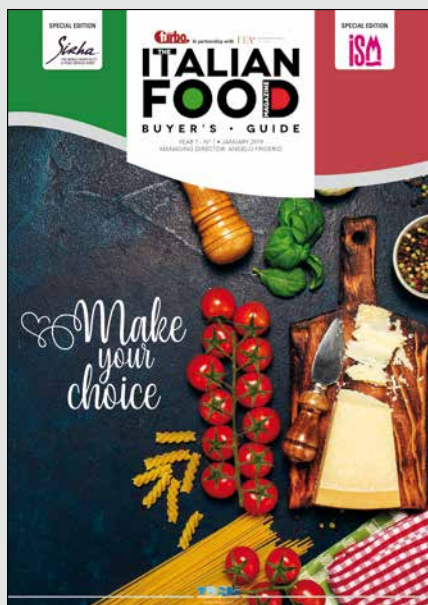
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**THE ITALIAN  
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**THE ITALIAN FOOD MAGAZINE**

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## NEWS

### TUTTOWINE IS BORN: THE FIRST EDITION DURING TUTTOFOOD 2019 (FIERA MILANO, 6-9 MAY)



An area and events specifically dedicated to wine will be featuring at Tuttofood 2019, from 6 to 9 May 2019 at Fieramilano, thanks to the agreement signed between Fiera Milano and Uiv - Unione italiana vini, the leading trade association in the sector. An event focused on three strengths: the selection of operators, incoming strategies aimed at modern distribution and an innovative area-event where, under the banner of the 'Tuttowine wine bar', exhibiting companies can promote their products in a series of tastings and meetings. The meetings will be enhanced by Italian and foreign wine journalists, market experts and opinion leaders, enriching an exhibition that is designed and created along with those who live the modern dimension of the wine market every day. Visitors to Tuttowine can enjoy a wide selection of wineries, bottlers and distributors of wine. In terms of the incoming, in line with the strategy of Tuttofood, top Italian and international buyers will be selected in the categories of importers and distributors, wholesalers, retailers, Horeca, specialty stores and delicatessens, modern retail, airlines, shipping lines and railways and, last but not least, e-commerce.

#### Il vino sbarca a Tuttofood: nasce Tuttowine (Fiera Milano, 6-9 maggio 2019)

*Il vino sbarca a Tuttofood 2019, manifestazione internazionale che andrà in scena a Fiera Milano dal 6 al 9 maggio del prossimo anno. Grazie all'accordo siglato tra l'ente meneghino e Unione Italiana Vini, la principale associazione di categoria del settore. L'appuntamento sarà caratterizzato da tre punti di forza: selezione degli operatori, strategie d'incoming mirate alla moderna distribuzione e un'innovativa area-evento dove, sotto l'insegna 'L'Enoteca di Tuttowine', le aziende espositrici potranno promuovere i propri prodotti in un calendario di degustazioni e incontri. Ad animare i momenti di confronto, i principali giornalisti del vino italiani e stranieri, esperti di mercato e opinion leader. Ampia, è annunciata, la selezione di aziende vitivinicole, imbottiglieri e distributori di vino che saranno presenti. Mentre per l'incoming, previsto l'arrivo di top buyer italiani e internazionali altamente profilati per il comparto nelle categorie importatori e distributori, grossisti, dettaglianti, Horeca, negozi di specialità e gastronomie, Distribuzione moderna, compagnie aeree, navali e ferroviarie ed e-commerce.*

### EU-JAPAN TRADE AGREEMENT TO ENTER INTO FORCE IN FEBRUARY 2019

On the past December 12th, the European Parliament gave its consent to the EU's trade agreement with Japan (Jefta), the largest bilateral trade deal ever negotiated by the EU. The economic partnership agreement will remove 99% of custom duties on exports from both countries, adding up to 1 billion euro annually for EU companies. The agreement should officially enter into force on 1st February 2019. Wine, cheese, beef, pork, pasta, chocolate and biscuits will enter duty-free either immediately, while 205 products with European geographical indications will be protected (46 Italian) against counterfeiting.

#### Accordo commerciale Ue-Giappone in vigore da febbraio 2019

*Lo scorso 12 dicembre il Parlamento europeo ha approvato l'accordo commerciale tra Unione europea e Giappone (Jefta). Si tratta del più grande accordo mai negoziato dall'Unione europea. In maniera progressiva, verranno eliminati dazi sul 99% dei beni importati dal Giappone in Europa e lo stesso farà Tokyo con quelli europei. Entrerà in vigore nel febbraio del 2019. In campo agroalimentare, l'accordo riguarderà prodotti come carni, salumi, formaggi, pasta, cioccolato e vino, oggi tassati in Giappone fino al 40%. Complessivamente, l'intesa rimuove dazi per oltre un miliardo di euro. Nel trattato commerciale sono presenti 205 prodotti a indicazione geografica protetta europei, di cui 46 italiani, che verranno riconosciuti dal Giappone e protetti da contraffazione.*





During the past months, the Fratelli Beretta deli meat factory registered in Canda its Prosciutto di Carpegna PDO, despite it was not included in the list of the 41 products with Protected designation of origin included in the Ceta trade deal. An achievement that could set a precedent for other Italian food specialties, so far excluded by the treaty. With the implementation of Ceta, Canada has

modified its Trade-marks Act simplifying the procedure to register new denominations. "The demand must be submitted not by companies but by a Consortium or Association of companies", said Marco Riva, general manager at Beretta. "It's an easy procedure, not expensive, that lasts about six months and that we managed to comply with thanks to the opportunity of Ceta."

Nei mesi scorsi il salumificio Fratelli Beretta ha registrato in Canada il marchio del suo prosciutto di Carpegna Dop, pur non essendo compreso nell'elenco delle 41 Ig tutelate dal Ceta. Un caso che potrebbe fare scuola e aprire la strada ad altre produzioni italiane di nicchia, per ora escluse dal trattato. Dopo il Ceta, infatti, il Canada ha modificato la sua normativa di base (Trade-marks act), consentendo di registrare con facilità nuove indicazioni. "La domanda deve essere fatta non dalle imprese", spiega Marco Riva, direttore degli affari generali Beretta, "ma dal Consorzio o dalle associazioni di imprese che sono dietro l'Indicazione geografica". Si tratta di una procedura "semplice, non costosa, durata circa sei mesi". E che "non sarebbe stata possibile senza il Ceta", conclude Riva.

In the next 12 years, chicken meat will be the only type of meat to record a steady growth in the European market. According to a report issued by the EU Commission and entitled 'Eu agricultural outlook for markets and income 2018-2030', production and consumption of poultry will increase by 4%, mainly thanks to a raise in international exports (with an expected average yearly growth rate of 1.4%), mainly directed to some Asian countries, including Vietnam, the Philippines and Cambodia, and some Sub-Saharan African countries (South Africa, Ghana and Benin). In regard to consumption, the report highlights that the European market is relatively mature and it should reach 24 kg per capita in 2018. The growth is expected to run around +0.2% per year, up to a per capita consumption of about 24.8 kg.

**Nei prossimi 12 anni la carne di pollo sarà l'unica tipologia di carne che registrerà una crescita costante nel mercato europeo. Secondo l'ultimo rapporto della Commissione 'Eu agricultural outlook for markets and income 2018-2030', la produzione e il consumo di pollame cresceranno complessivamente del 4%, grazie soprattutto all'aumento delle esportazioni internazionali (che dovrebbero crescere in media dell'1,4% all'anno), in primis verso alcuni Paesi asiatici, tra cui Vietnam, Filippine e Cambogia, e alcune nazioni dell'Africa Sub-sahariana (Sudafrica, Ghana e Benin). Sul fronte del consumo di carne avicola, il rapporto sottolinea che il mercato comunitario sta raggiungendo la sua maturità e nel 2018 dovrebbe attestarsi a 24 Kg procapite. La crescita dovrebbe essere intorno al +0,2% l'anno, fino a raggiungere un consumo pro capite di circa 24,8 Kg.**



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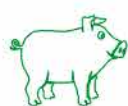


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# "THE FLAVOR OF OUR SOUL"

A new way of conceiving the role of the Consortium and its primary goal: to protect and promote this PDO cheese (Protected Denomination of Origin). And a proactive approach focused on enhancing product quality and differentiation, starting from Fresh and Aged Asiago, passing through Organic Asiago to Asiago Product of the Mountain, without forgetting Fresh Asiago made with Brown or Burlina cows' milk. For a long time now, the Consortium's market strategy has distinguished itself for the originality of its promotional campaigns, and the important marketing activities carried out on a global scale.

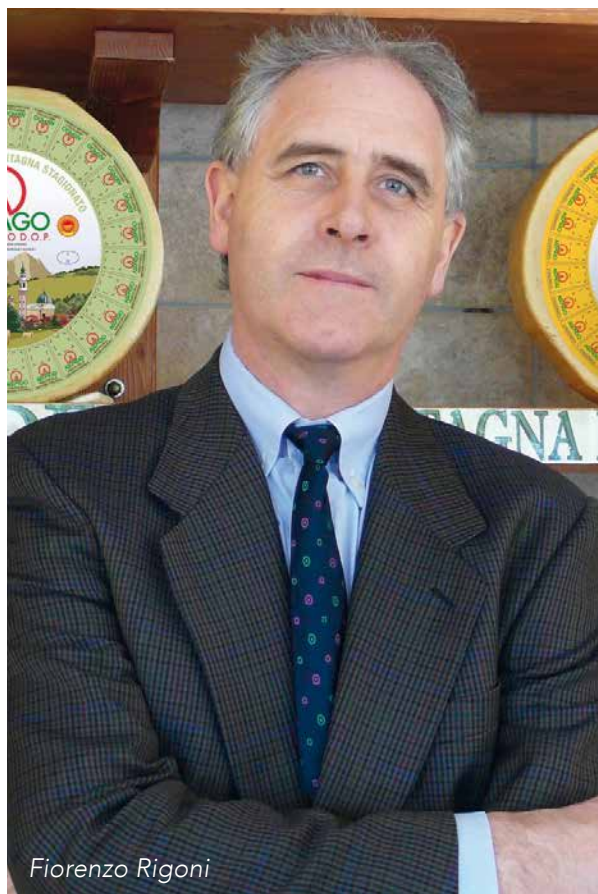
The latter, in particular, allowed to achieve important results in terms of protection of the Asiago PDO brand, like the recent recognition of the designation by Mexico. We talked about that and much more with Fiorenzo Rigoni, chairman of the Consortium, that with his strong yet gentle character shares some important features with the cheese and the territory he represents.

**Are you planning something new for 2019?**

The project we recently presented to the Consortium's Board of Directors for the new year is focused on the promotional activities that we carried out in grocery retail also during 2017 and 2018, and that gave really impressive results.

**Which is the goal of such activities?**

First of all, to improve the knowledge of the product, of its thousand-year-old history and characteristics, most of all for what concerns Aged Asiago, available in three different seasonings: 'Mezzano' (medium seasoned), 'Vecchio' (mature) or 'Stravec-



Fiorenzo Rigoni

chio' (extra mature). Asiago PDO also features important nutritional and nutraceutical properties and has high vitamins content. In addition, we also want to enhance our beautiful territory, where these unique products are manufactured. A goal we strive for by organizing tastings, educational, and informative projects.

**With what results?**

In 2017, we registered record sales for Aged Asiago, up by 19%. A trend confirmed also in 2018, with consumption on a rising note for both Asiago types, Aged and Fresh. Overall, in 2017 were produced

1.571.365 Asiago PDO wheels, 1.338.829 Fresh Asiago wheels, and 232.536 Aged Asiago wheels. The latter type saw a 4.8% production increase over 2016.

Two niche Asiago types - Organic and Product of the Mountain - are growing fast too. In addition, we have been working on a further segmentation for pressed Asiago, by introducing Asiago from Brown cows' milk and Asiago from Burlina cows' milk.

**Did grocery retailers welcome these initiatives?**

Definitely. Many retailers, that previously only had one type of Aged Asiago in their offer, started selling many other different types, including Stravecchio (extra mature), once sold only on a local level. Such promotional activities were supported also by a strong television campaign, during the Christmas season, characterized by the motto 'The flavor of our soul' and by the TV commercial registered on the Plateau of the Seven Municipalities. It tells the story of a strong connection, the one existing between this cheese and its long-standing tradition, inviting consumers to enter the world of Asiago PDO.

**What kind of activities are you carrying out on global markets?**

Currently, we are running two promotional programs, both co-financed by the UE and developed in collaboration with other Protection Consortia. Also in this case, activities are mainly focused on grocery retail and are aimed at strategic markets like Austria, Poland, Hungary, Czech Republic, US, and Canada.

**How is Central Europe performing?**



**"Il sapore della nostra anima"**

È il claim scelto dal Consorzio Tutela Formaggio Asiago per rappresentare e promuovere la Dop. Un ruolo interpretato in chiave innovativa, con un'intensa attività in-store in Gdo e un piano di tutela del marchio sui mercati internazionali. Intervista a Fiorenzo Rigoni, presidente del Consorzio.



THIS IS THE MOTTO CHOSEN BY THE CONSORTIUM FOR THE PROTECTION OF ASIAGO TO REPRESENT AND PROMOTE THIS EXQUISITE PDO CHEESE. A ROLE PLAYED IN AN INNOVATIVE WAY, WITH AN INTENSE IN-STORE ACTIVITY IN GROCERY RETAIL AND A BRAND PROTECTION STRATEGY ON GLOBAL MARKETS.



It's booming. Also in countries like Hungary and Poland, where Asiago was hardly known until just a few years ago, retail chains have started to appreciate our cheese and to include it in their offer. To keep on growing, now, we need our members to do their part.

#### What do you mean?

It is of utmost importance that the Members of the Consortium take the greatest advantage of these activities, in terms of brand protection, internationalization, and promotion. There are companies with huge potential that need to start believing in their possibilities and invest in distribution on new markets. Today, the EU production scheme provides great benefits for Asiago producers, since the overrun of the quotas

does not include cheeses intended for exports. This way, Members are encouraged to go beyond national borders, which is good for the Asiago brand worldwide.

Talking about global markets, you recently gained the recognition of Mexico...

We achieved full recognition and protection for Asiago cheese in the whole country. The specialty has been included in the EU-Mexico agreement, thus making it possible to fall within the 20,000 tons quota of product that can be exported at zero duty. We have shown that dialogue, together with constant and consistent work are the key to success. Once again, we have demonstrated through facts that promotion and protection are two sides of the same coin. It is

now up to our members to concentrate on significantly strengthening exports, seizing the great opportunities represented by the high level of recognition and of international prestige gained by Asiago PDO in recent years.

A final question on trade shows: which ones will you attend in 2019?

In this regard, we decided to focus on countries - often far-away countries - where the Consortium is carrying on important promotional activities. Like China, Mexico, and Japan. In the latter, sales of Asiago PDO have increased by 50.4% between 2016 and 2017. We will be there in March, trying to negotiate a favorable deal like the one achieved with Mexico.





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# THE FUTURE OF FOODSERVICE

CURRENT TRENDS AND FUTURE PERSPECTIVES FOR A FAST-GROWING CHANNEL. ON THE EVE OF THE YEARLY SECTOR'S N.1 MEETING PLACE, THAT WILL TAKE PLACE IN LYON, FRANCE, FROM JANUARY 26TH TO 30TH.



The foodservice industry is moving at an increasingly fast pace and needs to change in order to adapt to consumers' new lifestyles and expectations. Digital tools have a significant impact on usages whereas concerns over our health and the environment affect consumer habits. In the face of these issues and stakes the Sirha trade show stands as the not-to-be-missed event for all players in the foodservice industry around the world. The show's 19th edition will be held in Lyon, from January 26th to 30th, 2019. And it will boast an additional 10,000 sqm hall to accommodate 3,000 exhibitors and brands covering 12 sectors, and welcome more than 200,000 professionals visiting from all over the world.

"We are seeing a strong rise in the number of international exhibitors who will actually represent one quarter of the exhibitors at Sirha 2019," explained Marie-Odile Fondeur, mana-

ging director of Sirha. "Over the years, Sirha has established itself as a unique trade show in the food service and hospitality industry and has become a major event for food professionals all over the world. Our strength is to have created a B2B event with an exhaustive offering that has retained its friendly ambiance. Indeed, the most prestigious players in gastronomy today and tomorrow come to meet and exchange at the largest gathering of chefs on the planet."

Sirha hosts no less than 21 contests demonstrating the excellence and talent in the different trades (cooks, maîtres d'hôtel, cheese makers, butchers, bakers, pastry chefs, baristas etc.) and illustrating new techniques and ideas. The contests include the finals of the prestigious Bocuse d'Or and Coupe du Monde de la Pâtisserie - celebrating its 30th anniversary in 2019 - and the International Catering Cup.



## RESTAURANTS: A BOOMING BUSINESS

The European market for catering and snacking is strong and is stepping up its pace in a favorable environment driven by quick service, fast food and fast casual, new times of the day such as breakfast and afternoon snacks.

# +2,5%

END OF JUNE 2018 FOR THE  
TOP 5 (VS +2% END JUNE 2017)

### GROWTH OBSERVED IN ALL COUNTRIES IN THE TOP 5:

**GERMANY**  
+2,9%

**SPAIN**  
+2,2%

**FRANCE**  
+2%

**ITALY**  
+2,7%

**UNITED KINGDOM**  
+2,6%

France in particular confirms an upturn  
with 2% in value end of June 2018  
vs +0.7% end of June 2017.

Source: Sirha and the research institute NPD

## WELLBEING OR PLEASURE: THAT IS THE QUESTION

Today's consumers want the best of both words: food that is better for their health and more delicious at the same time. This poses a real challenge to the foodservice industry, but is also a source of new opportunities. Since becoming aware of the effect on the body of gluten, lactose or traces of pesticides found in



some food, 69% of consumers report they are concerned by the impact of their diet on their body. This is confirmed by a booming in the use of mobile apps that detail the composition of food products, 76% of guests say they would pay more to eat better food and 8 out of 10 expect to find bio products in their plate at the restaurant. Yet, today's eaters want to look after their health without compromising on gourmet pleasure. This is observed in commercial foodservice as well as in mass catering, where users are increasingly demanding with respect to the quality and

taste of the products used. Laws and amendments recently adopted in France stipulate that by 2022, 50% of sourcing for school canteens will need to be healthier and more responsible, while placing an emphasis on taste and a fun approach to meals.



## WHAT'S TRENDING NOW

Food Service Vision and Sirha have carried out a large-scale multi-source survey to capture the major current and short term influences in foodservice. Seven main influences, that concern four categories of trends, were highlighted: awareness (flexitarianism and responsibility), wellbeing (naturally good), territoriality (locavorysm and globalisation) and augmented experience (convenience and emotions). These precursory signs already affect all sectors of catering and foodservice and will become increasingly important within the next three years.

### Awareness

Today, consumers are aware of our environment and the new food balances that are required. They look to vary their diet (flexitarianism) by reducing for example their meat intake, drawing on the diversity offered by leguminous plants to ensure their daily protein intake. 'Eating less for a better

diet' implies becoming more responsible for one's food intake: by paying attention to the origin of the products but also by reducing one's carbon footprint: local sourcing, waste management...

### Wellbeing

Eaters are aware of the impact of their diet on their health. So they naturally turn to healthy products, regardless of the place they get them from: restaurant, canteen, café, take away etc. Professionals in the industry need to reorganize their supply chain and agrofood industrials must endeavor to adopt more virtuous production methods: organic label, certificate of origin.

### Territoriality

Be it for ecological, economic or identity-related concerns, chefs and guests alike aspire to go local. This also offers an excellent opportunity for regional authorities to boast and promote

their local gastronomy, as an important asset for tourism. At the same time, the foodservice sector is experiencing unprecedented international growth: certain products and concepts are being exported to create unique 'fusion' gastronomy, and major brands propose a standardised offering all around the world.

### Augmented experience

Beyond the plate in itself, guests are looking for an experience that is fluid and memorable thanks to the décor, spectacle or new services on offer. These criteria are a major source of appeal and attract much attention on social networks, in particular with the boom in home delivery and new forms of entertainment. Digital tools also contribute to make life easier - preparation, presentation, reservations, orders - both for customers and restaurateurs, and can significantly change the way chefs work in the kitchen.



## Il futuro del foodservice

*Trend e prospettive di sviluppo per un comparto in forte crescita a livello europeo. Che si riunirà a Parigi, dal 26 al 30 gennaio, per la 19esima edizione di Sirha, evento numero uno al mondo per i professionisti della ristorazione e dell'ospitalità. 3mila gli espositori, rappresentativi di 12 diversi settori, e oltre 200mila i visitatori attesi da ogni parte del mondo.*

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# "WE ONLY ASK FOR THE BEST"

INTERVIEW WITH GIULIANO SITA, CEO OF SAGFOOD. BELGIAN IMPORTER AND DISTRIBUTOR OF ITALIAN FOOD PRODUCTS THAT, IN ORDER TO KEEP ON GROWING, IS NOW BETTING ON ANIMAL WELL-BEING, TRACEABILITY, AND VALUE-ADDED SERVICE.

Established in 1995 by the brothers Alessandro and Giuliano Sita, Sagfood is the natural evolution of the company founded four years before, in 1991, by their father, Salvatore Sita, and called Gap Belgium. The company's main objective has always been the import and distribution of Italian food products in the Belgian market, mainly directed to modern distribution. The product range is wide and varied with a special focus on premium and top quality products, especially in charcuterie and dairy. We talked about that with Giuliano Sita, ceo of Sagfood, that in a supplier looks for "punctuality, professionalism, and service to clients."

**What's the company's core business?**

First of all, the whole Italian deli meat production, mainly sold as Private Labels. Raw hams, like prosciutto San Daniele and Parma, are probably the most performing product categories, followed by seasoned cheeses and all the food delicacies to be served as an aperitif.

**Which are your main distribution channels?**

Modern distribution, with a 70% market share, is definitely our number one distribution channel. Secondary sales channels are that of wholesalers and industry. The Netherlands, Belgium, and Luxembourg are our top destination markets, but our business is well consolidated and widespread also in the United States, thanks to our branch company Sagfood Usa, managed by my brother.

**How is your product range structured?**

Our product portfolio includes all of the Italian deli meats, available in whole or portioned pieces, as well as sliced. In the dairy sector, some of our 'best sellers' are Parmigiano Reggiano, Grana Padano, and Provolone. In regard to seafood specialties, marinated fish, octopus, squid, shellfish sold in trays or baskets are highly appreciated. For what concerns vegetable aperitifs, the most requested are eggplants, zucchini, grilled peppers, dried tomatoes,



Giuliano Sita



From left: Alessandro and Giuliano Sita

## "All'Italia chiediamo solo il meglio"

*Fondata nel 1995 dai fratelli Alessandro e Giuliano Sita, Sagfood è l'ideale continuazione dell'attività avviata dal padre, Salvatore Sita, nel 1991, e denominata Gap Belgium. Il focus è, da sempre, l'import e la distribuzione di prodotti alimentari italiani sul mercato belga. Destinati, prevalentemente, al canale della Grande distribuzione organizzata. La gamma include ogni tipologia alimentare, con una specializzazione particolare sui prodotti premium, soprattutto nel comparto della salumeria e del lattiero caseario. Ne abbiamo parlato con Giuliano Sita, ceo di Sagfood, che in un fornitore cerca, prima di ogni altra cosa, "puntualità, professionalità e servizio al cliente".*

mushrooms and artichokes, sold in trays or baskets. Let's not forget, of course, fresh pasta and pizza.

**Which are, at the moment, the products most requested by your clients?**

San Daniele and Parma ham, as well as other excellent deli products like Culatello, Bresaola, and Speck. Hence, it is worth remembering that Belgium has been, until a few years ago, the most important consumer of prosciutto San Daniele while Sagfood has been, for its part, the number one exporter for over 15 years. In the dairy sector - besides the above-mentioned Grana Padano, Parmigiano Reggiano, and Provolone - we have registered an increasing demand also for typical Italian cheeses like Mozzarella, Gorgonzola, Taleggio, Mascarpone and different kinds of Pecorino.

**How are PDO and PGI products perceived, in your opinion?**

In a very positive way. For our clients, certifications of origin are synonyms with quality and tradition.

**How often do you include new products in your range?**

Very often, I would say. Especially in the field of sliced delis where there is great technological evolution in the slicing techniques and in the available sizes. We also noticed a greater demand for organic products and regional specialties. Overall, the main trends that are driving our purchasing decisions are innovation, animal well-being and traceability. Not by chance, our company's philosophy is grounded on the motto: 'Simply the best'. To us, it means offering the highest quality at the best price.

**Which are, for Sagfood, the most important requirements to start the collaboration with a new supplier?**

Reliability, punctuality, professionalism and, of utmost importance, the value-added service to clients. A fundamental requirement today.

**One last question: do you attend any sector trade show in Italy that is of big importance for your business?**

Of course: Cibus in Parma, Tuttofood in Milan and Marca in Bologna.





# IN THE NAME OF 'SNACKING'



TRENDS AND GROWTH PERSPECTIVES FOR BAKERY AND CONFECTIONERY PROFESSIONALS. WHO WILL MEET IN COLOGNE, GERMANY, FROM 27TH TO 30TH JANUARY 2019, FOR THE 49TH EDITION OF ISM. BELOW, A GALLERY OF THE MAIN INNOVATIONS THAT WILL BE SHOWCASED BY ITALIAN EXHIBITORS.

New recipes, reduced portions, captivating packs. According to the Nielsen research company, these are the trends that will drive the 'snack revolution' in the near future, detailed in the report entitled 'The power of snacking'.

The sector is huge and, alongside the more traditional product categories, - savory and sweet snacks, bars and soft drinks - in the last five years it has further widened to include new products that want to be both tasty and healthy, in order to meet the new needs of consumers following healthier, yet more and more frenetic lifestyles.

All of that will be on display at Ism Cologne (Germany), the world's number one trade show for the snacks and confectionery industries, which is getting ready to host 1,700 exhibitors from over 70 countries from 27th to 30th January 2019. As usual, the number of Italian companies attending the show is high. To them, Ism is the ideal test bench for the launch of their latest creations. Below is a preview of the most interesting new products that will be presented during the German event.

### The 'healthy' trend

According to Nielsen, over a quarter of consumers are now looking for snacks with natural flavors or colorings, a trend that is expected to keep on growing, along with the reduction of the salt and fat content. An option to manage the sugar content, instead, is to reduce the size of products. The Nielsen Sugar Tax survey shows that most British consumers are ready to accept such reductions (65%), especially the youngest (74%), but are not willing to pay more for a smaller product.

According to Innova Market Insight, between 2013 and 2017, new snack launches with health claims increased by 17%

while those with 'nutritious' claims by 22%. In the same period, the launches of products with claims related to the protein content have increased by 31% (especially snacks based on dried fruit, seeds or meat), along with the 'vegan' claim (+44%).

### Premiumness

Consumers' criteria for classifying a product as 'premium' are many and varied.

Often based on cost, pack or brand. Nevertheless, according to Nielsen, the real 'premiumness' indicator is the use of high quality ingredients (this is true for 54% of consumers), along with higher functionality and performance (46%), better style or design (38%). The price was indicated by 31% of respondents.

Federica Bartesaghi

# La Perla

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### Snack: una nuova identità

Torna l'appuntamento con Ism Colonia (in Germania dal 27 al 30 gennaio 2019), kermesse numero uno al mondo per il settore degli snack e dei prodotti dolciari, che per la sua 49esima edizione si prepara ad accogliere 1700 espositori da oltre 70 Paesi. Folta la delegazione di aziende italiani presenti in fiera, per le quali Ism è il banco di prova ideale per il lancio delle loro ultime novità di prodotto. Di seguito un'anteprima delle più interessanti che saranno in mostra a Colonia.

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## ISM 2019 - PRODUCT PREVIEW

### GOLOSITÀ DAL 1885 PERLE DI FRUTTA (CHOCOLATE COATED FRUIT)

HALL: 4.2  
BOOTH: D 20  
[www.torrone.it](http://www.torrone.it)



#### Product description

The best fruits coated with the finest chocolate, dark or milk. An exclusive union in 9 different combinations, all to be tasted.

#### Ingredients

Fruits and chocolate.

#### Packaging details

75 gr case.

#### Shelf life

12 months.

#### International certifications

Brc, Ifc.

### BISCOTTIFICIO VERONA COCOA LADY FINGERS

HALL: 10.2  
BOOTH: D 071  
[www.biscottificioverona.com](http://www.biscottificioverona.com)



#### Product description

Special lady finger with 10% cocoa cream in the dough which gives to the product a good texture and taste. Suitable both for breakfast, tiramisù and other cakes.

#### Ingredients

Wheat flour, sugar, eggs 26%, cocoa cream 10% (water, low fat cocoa 40%, glucose syrup, sugar), raising agents (ammonium hydrogen carbonate, sodium hydrogen carbonate, disodium diphosphate), glucose syrup, flavourings.

#### Shelf life

12 months.

#### Packaging details

200 gr flow pack; 20 units/carton.

#### International certifications

Ifs, Brc.

### ADR BACI OF SASSELLO WITH HAZELNUT

HALL: 4.2  
BOOTH: D 40  
[www.sassellese.it/en/](http://www.sassellese.it/en/)



#### Product description

Two small and delicious hemispheric cookies with hazelnuts, welded together by a delicious chocolate cream.

#### Packaging details

Bag 5,65 OZ, 160 gr.

#### Shelf life

6 months.

#### International certifications

ISO 9001, Standard Ifs and Brc, ISO 14001, Rspo - Roundtable on sustainable palm oil for levels Mass Balance and Segregation.

### DOLCIFICIO VENETO SAS DI LAZZARI LUCA & C. BRITTLE BAR PEANUTS, SESAME SEEDS AND PUFFED RICE

HALL: 4.2  
BOOTH: C 039  
[www.dolcificioveneto.it](http://www.dolcificioveneto.it)



#### Product description

Our crispy bars and cakes whet even the most demanding appetite by creating a perfect match between goodness and genuineness. The tasty bars made with puffed rice are perfect to enjoy a fast snack.

#### Ingredients

Peanuts (45%), sugar, glucose syrup, sesame seeds and puffed rice.

#### Packaging details

Flow pack of 80 gr.

#### Shelf life

8 months.

#### International certifications

Iso 9001:2015.

### CASA DEL DOLCE TRINKETTO PEACH

HALL: 10.2  
BOOTH: B 090  
[www.casadeldolce.it](http://www.casadeldolce.it)  
[www.trinketto.com](http://www.trinketto.com)



#### Product description

Soft drink peach flavor.

#### Ingredients

Water, sugar, citric acid, peach flavor, preservatives: E202, E211.

#### Packaging details

70 ml.

#### Shelf life

18 months.

#### International certifications

Brc, Ifs.

### DI COSTA COLOMBA WITH ORANGE CREAM

HALL: 10.2  
BOOTH: H 049  
[www.dicosta.it](http://www.dicosta.it)



#### Product description

Colomba, oven natural leaving product.

#### Ingredients

Wheat flour, orange cream, sugar, butter, eggs, icing, sugar sprinkles, natural yeast, egg white, candied orange peel paste, salt, natural flavorings.

#### Packaging details

750 gr.

#### Shelf life

9 months.

#### International certifications

Ifs, Brc.

### FIorentini ALIMENTARI 'SNICK SNACK' TRIANGLES WITH VEGETABLES

HALL: 11.1  
BOOTH: B 020  
[www.fiorentinialimentari.it](http://www.fiorentinialimentari.it)



#### Product description

Potato, red beet, carrot and spinach: this is the tasty mix of Snick Snack. Vegan certified, gluten free and not fried, it is super crunchy and savory but still with a low content of saturated fats. The oil is sprayed raw on the snacks to keep them healthy and light, with no palm oil nor flavor enhancer. According to a market research among similar products, it contains about 70% less fats.

#### Ingredients

Potato, red beet, carrot and spinach.

#### Packaging details

70 gr.

#### Shelf life

9 months.

#### International certifications

Ifs, Brc.

### BULGARI AGOSTINO MARSHMALLOW BUTTERFLIES

HALL: 10.2  
BOOTH: D 088  
[www.bulgariagostino.it](http://www.bulgariagostino.it)



#### Product description

Marshmallow candies in butterfly shape

#### Ingredients

Sugar, glucose-fructose syrup, water, gelling agent: food gelatine, nature-identical flavours, non-azoic colours.

#### Packaging details

900 gr x 6 bags.

#### Shelf life

18 months.

#### International certifications

Ifs, Brc, ISO9001:2015.

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## ISM 2019 - PRODUCT PREVIEW

**FREDDI DOLCIARIA**  
**FREDDI MORETTA**  
**CLASSIC**  
**HALL: 11.1**  
**BOOTH: D 019 - E 018**  
[www.freddi.it](http://www.freddi.it)



### Product description

Freddi Moretta Classic is Fred-di's flagship snack: a delicious chocolate coated soft cake with a cream of fresh whole Italian milk. Now with a new innovative packaging called 'the new display solution', which is 10 times more practical: stand-alone counter displays; top open window for better product viewing; stackable displays to impact the view on the counter; more flavours at the same time to choose; space saving solution; new format 15 cakes; our delicious cakes at home and away; one small cake impulse buying; single display as shipping solution for the normal trade; reduced investment for the shop. Available also for the Freddi Moretta Tiramisù.

### Ingredients

Sugar, vegetable oils, wheat flour, fresh eggs, skimmed milk powder, fresh pasteurized milk, fat reduced cocoa powder, milk proteins, natural flavouring (vanilla).

### Packaging details

Pack of 15 coated mini cakes filled with fresh whole milk cream 450 gr (15x30 gr - individually wrapped).

### Shelf life

9 months.

### International certifications

Brc, lfs.

**GALUP**  
**PANETTONE**  
**WITH TURMERIC**  
**HALL: 4.2**  
**BOOTH: B 013**  
[www.galup.it](http://www.galup.it)



### Product description

A recipe that is a revelation, thanks to an original mix that includes turmeric in the dough. Turmeric, appreciated in the East for its properties, makes Galup panettone even more rich and sought-after. Highly appreciated by health-conscious consumers and those who love unusual tastes and flavors.

### Ingredients

Turmeric, raisins and candied fruits in the dough.

### Packaging details

750 gr.

### Shelf life

5 months.

**LAGO GROUP**  
**STRAWBERRY**  
**'MINI PARTY WAFER'**  
**HALL: 10.2**  
**BOOTH: H 081**  
[www.lagogroup.it](http://www.lagogroup.it)



### Product description

Line extension with a new fruit flavor.

### Ingredients

Wafer with strawberry flavoured cream (74%). Ingredients: wheat flour, coconut oil, sugar, glucose syrup, whey powder (milk), colour: beetroot red, emulsifiers: soya lecithin, salt, flavourings, raising agents: sodium hydrogen carbonate.

### Packaging details

Flow pack bag 125 gr.

### Shelf life

18 months.

### International certifications

Halal, lfs.

**TARTUFLANGHE**  
**TRUFFLE BITE,**  
**TRUFFLE SNACK**  
**HALL: 4.2**  
**BOOTH: C 25**  
[www.tartuflanghe.com](http://www.tartuflanghe.com)



### Product description

Appetizing savory snack with truffle. Ideal for aperitif, with salads, cheeses and meats.

### Ingredients

Wheat flour, olive oil, truffle.

### Packaging details

30 gr and 100 gr.

### Shelf life

10 months.

### International certifications

Brc, lfs and 'Eccellenza Artigiana'.

**TERRE DI PUGLIA**  
**ORGANIC TARALLI WITH**  
**TURMERIC**  
**HALL: 10.2**  
**BOOTH: H 064**  
[www.terredipuglia.it](http://www.terredipuglia.it)



### Product description

Terre di Puglia Organic taralli with turmeric, made only with extra virgin olive oil, meet the growing need of many consumers to choose healthy snacks, with few calories and nutritional benefits. Curcuma is in fact a spice with important antioxidant and anti-inflammatory properties. Terre di Puglia offers sustainable quality standards and certified to offer not only genuine but also tasty snacks, capable of conquering the most demanding palates.

### Ingredients

Wheat flour, white wine\*, extra virgin olive oil\*, turmeric\*. (\*organic)

### Packaging details

Bag 200 gr.

### Shelf life

12 months.

### International certifications

Organic Ica.

**ICAM**  
**VANINI ORGANIC DARK**  
**CHOCOLATE WITH**  
**WHOLE HAZELNUTS**  
**AND CARAMEL**  
**HALL: 10.2**  
**BOOTH: G 30-38**  
[www.icamcioccolato.com](http://www.icamcioccolato.com)



### Product description

Greedy bar of 100% organic dark chocolate made with Uganda single origin cocoa. An intriguing recipe that combines a full cacaoté flavor with slight astringent notes, that combines the crunchiness of whole hazelnuts with the sweetness of caramel crystals. Complete the line a range of other 5 bars: 70% cocoa fudge, 34% cocoa milk, 56% fondant with whole salted pistachios, 34% milk with whole almonds and soft gianduia with whole hazelnuts.

### Ingredients

Cocoa mass from Uganda\* (31%), cane sugar\*, whole hazelnuts\* 20%, cocoa butter\*, caramel\* 5% (sugar\*, glucose syrup\*), hazelnut paste\*, emulsifier: soya lecithin\*, vanilla extract\*. May contain traces of milk and other nuts. Gluten free. (\*organic)

### Packaging details

100 gr/12 carton case.

### Shelf life

18 months.

### International certifications

Organic, Kosher, Halal, bean to bar, gluten free, Fsc.



**LAICA**  
**THE EXTRA DARK 72%**  
**HALL: 5.2**  
**BOOTH: L11 - L15**  
[www.laica.eu](http://www.laica.eu)



#### Product description

The extra strength of dark chocolate 72% declined in three shapes - filled cocoa boules, tablet 100 g and block - for a moment of intense cocoa flavour. Crispness and smoothness enclosed in a single bite, from which emerges the typical bitter, yet pleasant taste of Laica's fondant: a fragrant, harmonious and balanced chocolate.

#### Ingredients

Extra dark chocolate 72%.

#### Shelf life

24 months for tablet and block; 18 months for boules.

#### International certifications

Iso 22000, Brc, International Food Standard, Utz, Rspo, Kosher, Sedex, Fairtrade.

**MAJANI 1796**  
**MAYAN GOD INFUSION**  
**HALL: 4.2**  
**BOOTH: B 029**  
[www.majani.com](http://www.majani.com)



#### Product description

The Mayan God Infusion is exclusively made with 'fino de aroma' cocoa bean peels, natural source of minerals, antioxidants, fibers and vitamins. It allows you to enjoy all the taste of chocolate without calories, sugars, fats, milk or gluten. The infusion can be consumed either hot or cold, just like tea, and it is suitable for those who follows a vegan or a vegetarian diet.

#### Ingredients

100% cocoa bean peels.

#### Packaging details

Paper tube with tin cover, 100 gr net weight.

#### Shelf life

12 months.

#### International certifications

Food Safety System Certification 22000.

**LOACKER**  
**CLASSIC DOUBLE CHOC**  
**HALL: 10.2**  
**BOOTH: C 009 - D 009**  
[www.loacker.com](http://www.loacker.com)



#### Product description

The new Double Choc wafer is made with 3 light and crispy dark wafer layers with 7% cocoa content. The 3 wafers are filled with 2 special Loacker cream filling layers made using exquisite cocoa and chocolate (75% of the product). All made with no added flavourings, colourings, preservatives, or hydrogenated fats. A new wafer delivering double the amount of goodness.

#### Ingredients

Chocolate and cocoa.

#### Packaging details

175 gr x 18.

#### Shelf life

18 months.

#### International certifications

Halal, kosher.

**MANGINI**  
**SUPERFRUTTI**  
**AND SUPERGRISSINI**  
**HALL: 5.2**  
**BOOTH: M 018**  
[www.manginicaramelle.eu](http://www.manginicaramelle.eu)



#### Product description

Real fruits (45%) covered with dark chocolate (55%) and crunchy breadsticks (25%) covered with dark chocolate (75%).

#### Packaging details

40 gr doypack bag (useful as a snack).

#### Shelf life

12 months.

#### International certifications

Ifs.

## SNACK: 10 TRENDS TO WATCH IN 2019

Source: Innova Market Insights

### 1. FROM SNACKS TO MINI MEALS

Packed with protein and wholesome ingredients, snacks increasingly fulfil the role of mini meals. They provide convenience and sustenance for time-pressured consumers.

### 2. LIGHTER ENJOYMENT

As consumers look to balance enjoyment with health, a growing number of snacks carry 'sugar free', 'low sugar' or 'no added sugar' claims. In this context, fruit and dried fruit act as natural sweeteners.

### 3. SAVORY SOARS

Snacks that include savory ingredients such as meat, cheese, herbs and spices invigorate the snacking landscape. The combination of sweet and savory makes for interesting new snacks.

### 4. MINDFUL SNACKING

As more snacks feature natural, no additives/preservatives, organic and GMO free claims, they allow the mindful consumer to snack indulgently, but also 'guilt-free.'

### 5. ARTISAN STYLE

From rustic-looking chips based on a traditional recipe to hand-popped corn made in small batches, artisan and craft products seem to evoke quality and are gaining ground in the snacks category.

### 6. PORTABLE PACKAGING

Easy to use snack packs - whether re-closable, portable or pre-portioned - provide portion guidance and answer to the busy lifestyles of the modern on-the-go consumers.

### 7. COCONUT IN THE SPOTLIGHT

With coconut receiving a great deal of attention for its perceived health benefits, it is a rising star among snacks. Chunks, flakes, cream, frozen or freeze-dried - the potential applications of coconut are endless.

### 8. GROWING ROLE FOR NUTS

Nuts and seeds already hold great appeal in snacks, but now manufacturers are experimenting with smoky, spicy and caramelized nut variations that offer limitless potential.

### 9. ADULTIFICATION

Snacks featuring premium flavors like coffee, beer or wine contribute to more sophisticated treats. The adult snacking market is thriving.

### 10. POPPED AND PUFF

Snack manufacturing goes beyond the conventional methods of baking or deep-frying: popped and puffed are emerging.

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	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
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				
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-nuremberg.de	
							FOOD & WINE EXPO (CANBERRA) foodandwineexpo.com.au					IPPE (ATLANTA) www.ippeexpo.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									
				VINEXPO (NY) www.vinexponeewyork.com			WORLDFOOD POLAND (WARSAW) www.worldfood.pl			SIAF (GUANGZHOU) www.spsinchina.com					
					FOODEX JAPAN (CHIBA) www.jma.or.jp/foodex/en				TASTE (FLORENCE) www.pittimagine.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				NATURAL & ORGANIC PRODUCTS EUROPE (LONDON) www.naturalproducts.co.uk								
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							SIAL CHINA (SHANGHAI) www.sialchina.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.fhw.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
AUGUST	Thu 1	Fri 2	Sat 3	Sun 4	Mon 5	Tue 6	Wed 7	Thu 8	Fri 9	Sat 10	Sun 11	Mon 12	Tue 13	Wed 14	Thu 15
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 FOOD (MALMÖ) www.nordicorganicfood.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

EDITED BY 



# 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	Thu 17	Fri 18	Sat 19	Sun 20	Mon 21	Tue 22	Wed 23	Thu 24	Fri 25	Sat 26	Sun 27	Mon 28	Tue 29	Wed 30	Thu 31
	ANFAS (ANTALYA) <a href="http://www.anfasfoodproduct.com">www.anfasfoodproduct.com</a>							BIO-BEURS (ZWOLLE) <a href="http://www.bio-beurs.nl">www.bio-beurs.nl</a>					MILLESIME BIO (MONTPELLIER) <a href="http://www.millesime-bio.com">www.millesime-bio.com</a>			
		FOOD HOSPITALITY WORLD (MUMBAI) <a href="http://www.fhwexpo.com">www.fhwexpo.com</a>							PROPAP PHILIPPINES (PASAY CITY) <a href="http://www.propakphilippines.com">www.propakphilippines.com</a>		SIRHA (LYON) <a href="http://www.sirha.com/fr">www.sirha.com/fr</a>					
CISCO) <a href="http://www.eSatts">www.eSatts</a>	TUECA (BOLOGNA) <a href="http://www.tueca.bolognafiere.it">www.tueca.bolognafiere.it</a>			SIGEP (RIMINI) <a href="http://www.sigep.it">www.sigep.it</a>							ISM (COLOGNE) <a href="http://www.ism-cologne.com">www.ism-cologne.com</a>					
												PROSWEETS (COLOGNE) <a href="http://www.prosweets.com">www.prosweets.com</a>				
15	Sat 16	Sun 17	Mon 18	Tue 19	Wed 20	Thu 21	Fri 22	Sat 23	Sun 24	Mon 25	Tue 26	Wed 27	Thu 28			
	<a href="http://www.biofach.de">www.biofach.de</a>				DAIRY & MEAT INDUSTRY (MOSCOW) <a href="http://www.md-expo.ru">www.md-expo.ru</a>			GOLOSITALIA (BRESCIA-ITALY) <a href="http://www.golositalia.it">www.golositalia.it</a>								
15	Sat 16	Sun 17	Mon 18	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
	FOOD EXPO GREECE (ATHENS) <a href="http://www.foodexpo.gr">www.foodexpo.gr</a>		PRO2PAC (LONDON) <a href="http://www.pro2pac.co.uk">www.pro2pac.co.uk</a>	PROPAP VIETNAM (HO CHI MINH CITY) <a href="http://www.propakvietnam.com">www.propakvietnam.com</a>								PROFOOD TECH (CHICAGO) <a href="http://www.profoodtech.com">www.profoodtech.com</a>				AFRICA FOOD MANUFACTURING (CAIRO)
n 15	Tue 16	Wed 17	Thu 18	Fri 19	Sat 20	Sun 21	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Sun 28	Mon 29	Tue 30	
	VINORUS (KRASNODAR) <a href="http://www.vinorus.ru/en-GB/">www.vinorus.ru/en-GB/</a>							AGRO FOOD OMAN (MASCATE) <a href="http://www.agro-oman.com">www.agro-oman.com</a>								
	FOODTECH (KRASNODAR) <a href="http://www.foodtech-krasnodar.ru">www.foodtech-krasnodar.ru</a>															
d 15	Thu 16	Fri 17	Sat 18	Sun 19	Mon 20	Tue 21	Wed 22	Thu 23	Fri 24	Sat 25	Sun 26	Mon 27	Tue 28	Wed 29	Thu 30	Fri 31
	<a href="http://www.sialchina.com">www.sialchina.com</a>															
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## ISM 2019 - PRODUCT PREVIEW

### MONVISO GROUP CREMON 3 CEREALS

HALL: 11.1

BOOTH: B 018

[www.monvisogroup.it](http://www.monvisogroup.it)



#### Product description

CreMon 3 Cereals, 100% vegetable, containing no palm oil and no lactose: in line with the company 'creed'. A new range that associates the pleasure of taste with prime ingredients, paying meticulous attention to nutritional values. CreMon are biscuits filled with cream and rich in fibre, thanks to the presence of three cereals in the recipe (soft wheat flour, corn flour and spelt flour). Available in hazelnut, gianduia and almond tastes.

#### Ingredients

Soft wheat flour, vegetable oils and fats, spelt flour, corn flour, soft wheat flour, low-fat cocoa powder, vegetable fibre.

#### Packaging details

Flow pack 150 gr.

#### Shelf life

12 months.

### TEDESCO PISELLI I CEREALI - 9CEREALS WITH PLUMS

HALL: 4.2

BOOTH: B 027

[www.tedeskogroup.it](http://www.tedeskogroup.it)



#### Product description

From the meeting of 9 cereals (wheat, oats, barley, rye, corn, spelled, buckwheat, sorghum, rice) with the fresh and genuine taste of plum is born the new and unique 9Cereals with plums.

#### Ingredients

Wholemeal wheat flour, oat flakes, oat flour, barley flour, rye flour, cornmeal, spelled flour, crushed millet seeds, buckwheat flour, white sorghum flour, rice flour, jam extra plums.

#### Packaging details

270 gr.

#### Shelf life

12 months.

#### International certifications

Brc, lfs, Bio, Utz, Fair Trade.

### NESTLÉ ITALIANA - BACI PERUGINA

HALL: 2

BOOTH: D 30

[www.baciperugina.com](http://www.baciperugina.com)



#### Product description

Baci Perugina is much more than a simple chocolate. It's a unique encounter: the soft inner with hazelnut grains and cocoa reaches the apex of crunchiness with the whole hazelnut and it is coated by the double cover of fine dark chocolate Luisa.

#### Ingredients

Sugar, hazelnuts 29%, cocoa mass, cocoa butter, milk powder, anhydrous butter (milk) emulsifier (sunflower lecithins), natural vanilla flavouring.

#### Packaging details

Baci bijou range: 200 gr.

#### Shelf life

11 months.

#### International certifications

Gluten free, Halal, Kosher. Baci is part of Nestlé Cocoa Plan and UTZ program.

### FIORE DI PUGLIA COSISANI

HALL: 4.2

BOOTH: B 15

[www.fioredipuglia.com](http://www.fioredipuglia.com)



#### Product description

Typical salty Italian snack high in protein produced with lentils flour.

#### Packaging details

210 gr multipack with 6 portions of 35 gr.

#### Shelf life

12 months.

#### International certifications

lfs 'high level', Brc 'A grade'.

### PASTIGLIE LEONE CONFETTERIA LEONE

HALL: 4.2

BOOTH: C 23

[www.pastiglieleone.com](http://www.pastiglieleone.com)



#### Product description

The new 'Leone Confectionery' line presents some of the most iconic and traditional products of the company treasured in elegant small boxes to give a sweet experience. Sukaj: aromatic liquorice gummy sweets; Ginevrine: handmade sugar candies; Polarstrong: refreshing mints; Zenzerelle: natural ginger jellies; Pastiglie miste dissetanti: the sweets pastilles of tradition; Violette: a romantic sweet bouquet.

#### Packaging details

Small gift boxes with 80 gr of product inside.

#### Shelf life

There is no shelf life, but we advise not to exceed 36 months.

### VALENTINO PANETTONE WITH DARK CHOCOLATE CHIPS

HALL: 3.2

BOOTH: C 031

[www.valentinodolciaria.com](http://www.valentinodolciaria.com)



#### Product description

The panettone is made according to a traditional recipe. Rich in butter, eggs and dark chocolate chips, is hand wrapped with art print paper foil.

#### Ingredients

Wheat flour, eggs, dark chocolate chips, butter.

#### Packaging details

Net wt. 35.2 oz

#### Shelf life

180 days.

#### International certifications

Brs, lfs, Gmo Free.

### SOCADO PIACERI ZENZERO E ARANCIA CANDITI & PIACERI MANDORLA E TORRONE

HALL: 4.2

BOOTH: E 030

[www.socado.com](http://www.socado.com)



#### Product description

Socado launches two new bags that smell like winter and combine exotic and traditional taste to obtain two irresistible mixes.

#### Ingredients

The first one is made of assorted extra dark chocolate pralines filled with cocoa cream and candied orange peels nuggets and cocoa cream and candied ginger nuggets. The second one of assorted milk chocolate pralines filled with milk cream and caramelized almond and milk cream and chopped hazelnut nougat.

#### Packaging details

Standing bag, 150 gr.

#### Shelf life

18 months.

### VALLEDORO RISIBISI

HALL: 4.2

BOOTH: B 28

[www.valledorospa.it](http://www.valledorospa.it)



#### Product description

This pea and rice-based nibble is a new crunchy organic snack from Valledoro. They have been baked in the oven and not fried, and are free from palm oil. They are a rich source of protein and fibre.

#### Ingredients

Pea flour\* 80%, rice flour\* 17%, sunflower oil\*, salt. (\*Organic - gluten free).

#### Packaging details

80 gr.

#### Shelf life

8 months.

#### International certifications

Organic.



**BORSARI VERONA - IDB**  
**COLOMBA CAKE WITH**  
**WHOLEMEAL FLOUR**  
**AND SEMI CANDIED**  
**BLUBERRY**  
**HALL: 3.2**  
**BOOTH: A 29**  
[www.borsariverona.it](http://www.borsariverona.it)



**Product description**  
Colomba cake with wholemeal flour and semi candied bluberry.  
**Ingredients**  
Wholemeal flour, butter, eggs, bluberry.  
**Packaging details**  
Hand wrapped.  
**Shelf life**  
180 days.  
**International certifications**  
Brc, Ogm free, SA8000.

**IL FORNAIO DEL CASALE**  
**PETTEGOLEZZI**  
**DI COLOMBINA**  
**GECHELE**  
**HALL: 3.2**  
**BOOTH: B 009**  
[www.gecchele.com](http://www.gecchele.com)



**Product description**  
Sweet snack for Christmas and carnival seasons.  
**Ingredients**  
Wheat flour, sunflower oil high oleic, eggs, butter and milk.  
**Packaging details**  
125 gr and 6 units in the carton.  
**Shelf life**  
90 days.  
**International certifications**  
Ifs, Organic.



**CONFECTIONERY IS BOOMING**  
The confectionery industry is showing optimism and confidence for the months ahead. According to the latest data issued by confectioneryproduction.com, it should register an annual growth rate of 3% until 2022. Global chocolate consumption, according to the research company Statista, will pass from 7.3 million tons in 2015 to the 7,9 million tons expected for 2019. The trend is interesting both producing companies and technology suppliers. The first ones busy in developing new products able to meet the new 'healthy' trend; the second ones deeply committed to studying new processing and packaging technologies, especially for what concerns a reduced use of sugar and smaller sizes.

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**Genuine flavour and smooth clean taste:**  
to enjoy the handmade goodness and the tradition preserved in simplicity.



Quality is the key

✓ Rich in Proteins    ✓ Low in Fats    ✓ GMO free    ✓ Allergens free    ✓ Gluten free    ✓ Lactose free





# ISM 2019 - PRODUCT PREVIEW

**PASTIFICIO DI BARI**  
**TARALL'ORO**  
**TARALLINI RED BEET,**  
**TUMERIC E GINGER,**  
**SPINACH E CHIA SEEDS**  
**HALL: 05.2**  
**BOOTH: G 038**  
[www.taralloro.it](http://www.taralloro.it)



**Product description**  
A typical organic product from Apulia, made with 100% organic soft wheat flour, which guarantees a unique and exceptional taste. The choice of natural organic ingredients like red beet, spinach, turmeric and ginger and chia seeds gives a bright color to the product and makes it more attracting, yet totally natural. Without sulfites, yeasts, palm oil; production process with steam boiling for greater friability and quality.

**Ingredients**  
Tender wheat flour, extra virgin olive oil, salt, beetroot / spinach / turmeric & ginger / chia seed. May contain traces of sesame.

**Packaging details**  
250 gr heat-sealed bag in paper box with window on the front side.

**Shelf life**  
12 months.

**International certifications**  
Ifs, Bcr, Iso 14001:2004, Ou Kosher, Nop/Bio.

**VICENZI**  
**GRISBÌ ESPRESSO**  
**HALL: 10.2**  
**BOOTH: B 071**  
[www.matildevicenzi.com](http://www.matildevicenzi.com)



**Product description**  
Matilde Vicenzi is pleased to release a great-tasting limited edition: Grisbi Espresso. The unique casket of crumbly short pastry is filled with Italian espresso coffee cream.

**Ingredients**  
Wheat flour, vegetable oils (palm oil, sunflower oil), sugar, glucose syrup, barn eggs, corn starch, cocoa, whey powder, ground coffee 5% in the cream, butter, whole milk powder, hazelnut paste, wheat starch, emulsifier: sunflower lecithin, salt, raising agents: sodium hydrogen carbonate, ammonium hydrogen carbonate, flavourings. May contain traces of peanuts, soy, other nuts.

**Packaging details**  
Net weight: 150 g. The unit contains 9 pieces.

**Shelf life**  
12 months.

**WITOR'S**  
**WITOR'S BITES**  
**HALL: 10.2**  
**BOOTH: A18 - B19**  
[www.witors.it](http://www.witors.it)



**Product description**  
Chocolate bite size with a creamy center and chocolate coating. Available in four different flavors.

**Ingredients**  
Chocolate, crispy cereals, chocolate nibs, biscuit.

**Packaging details**  
Doy pack 100 gr.

**International certifications**  
Utz.

**MOLINO NICOLI**  
**CRUNCHY OATY BARS**  
**WITH CHIA**  
**HALL: 5.2**  
**BOOTH: L 31**  
[www.molinsonicoli.it](http://www.molinsonicoli.it)



**Product description**  
No sugar added organic and allergen free crunchy oat bars with chia seeds. 100% natural ingredient and nutritionally balanced cereal bars, high in fiber, with superfood ingredients: whole grain oats and chia seeds. Perfect as an on the go snack or energy bar.

**Ingredients**  
Gluten free wholegrain oat flakes\* (63%), high oleic sunflower oil\*, crunchy white rice\* (rice\*, salt), inulin\* (chicory root fibre), concentrated apple juice\*, corn starch\*, chia seeds\* (3%), coconut oil\*, emulsifier: sunflower lecithin\*, salt, acidifier: sodium bicarbonate, anti-oxidant: rosemary extract\*. (\*Organic).

**Packaging details**  
Single pack 20 gr, multipack (6 per 20 gr bars).

**Shelf life**  
12 months.

**International certifications**  
Organic.

**MESSORI**  
**CIOCCOLATERIA**  
**VANILLA CONE**  
**HALL: 11.2**  
**BOOTH: E30 - E38**  
[www.messoricioccolateria.it](http://www.messoricioccolateria.it)



**Product description**  
Delicious wafer cones with vanilla cream, dark chocolate chips and puffed rice.

**Ingredients**  
Sugar, vegetable oils and fats (palm, sun flower), cocoa paste, wheat flour, rice flour, whey powder, lactose, skimmed milk powder, cocoa butter, fat reduced cocoa powder, barley malt extract, dextrose, emulsifier: soy lecithin, sunflower lecithin; coloring: vegetable carbon; salt, flavors, natural vanilla flavor.

**Packaging details**  
25 gr - 24 cones display. 4 or 6 cones bags.

**Shelf life**  
15 months.

**International certifications**  
Ifs.

**THE 'SNACK' BUSINESS IS WORTH OVER 20 MILLION EURO IN THE UNITED KINGDOM. BRITISH CONSUMERS ARE TODAY LOOKING FOR PRODUCTS WITH A LOW SUGAR CONTENT (NIELSEN)**

**BETWEEN 2010 AND 2017, THE NUMBER OF NEW PRODUCT LAUNCHES HAS INCREASED BY 125% IN EUROPE AND BY 47% IN NORTH AMERICA (GLOBAL NEW PRODUCT DATABASE, MINTEL)**



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Nuremberg, Germany

13 - 16.2.2019

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- New Products and Trends
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- Know-how and Learning

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# A JOURNEY THROUGH THE POLISH ORGANIC MARKET

MANUFACTURING, DISTRIBUTION, AND CONSUMPTION. A 360° ANALYSIS OF THE SECTOR'S DEVELOPMENT IN THE EASTERN EUROPEAN COUNTRY.

On the past 11th November Poland celebrated the 100th anniversary of its independence, gained in 1918: for 123 years, the country had 'disappeared' from the EU political map, after the divisions carried out by Austria, Prussia, and Russia. A symbolic date for a nation that, during the 20th Century, was severely affected by World War II. Of its glorious past, Warsaw only preserves the memories since nothing - or almost nothing - has survived the German bombings. The reconstruction process was long, expensive, and difficult, but in the end, it returned its capital to the population.

Today, the first thing you will notice arriving in Warsaw is the 'rigor of geometry' and urban decor. No trace of litter on the ground, or mendicants along the streets, only wide avenues full of Western chains like KFC, Subway, Starbucks, McDonald's, Zara, and H&M. Locals' attention for the dictates of fashion is evident, just like Warsaw's desire to equal the big European capital cities.

And just like it happens in many EU cities, also here the attention paid by consumers to the themes connected with health and well-being is growing fast. This is evident, above all, in the impressive number of gyms in every part of the city, also open 24/7. A healthy trend that is affecting the food market too. The organic sector is still a niche: 250 million euro the yearly turnover (it reaches 10 billion euro in Germany, for instance), and a per capita expenditure of 4 euro (vs. 90 in Germany). Nevertheless, the average growth rate of organic production was 30% in the past three years.

We talked about that and much more on the past 6th and 7th November in Warsaw, on the occasion of the official presentation to the international press of Biofach 2019, the world leading organic trade show that will take place in Nurnberg, Germany, from the 13th until the 16th February 2019. A two-days investigation in the sector's present and future, to identify the trends that will drive its growth in the near future.

## Viaggio nella Polonia del Bio

*Produzione, distribuzione e consumi alimentari. Un'analisi a 360° sullo sviluppo del comparto nel paese europeo. Aspettando la 30esima edizione di Biofach, a Norimberga, in Germania, dal 13 al 16 febbraio.*

## FOCUS RETAIL

### ORGANIC FARMA ZDROWIA

Belonging since 2016 to the Italian group Ecornaturasi, Organic Farma Zdrowia has a network of 40 shops in Poland. One of the most recent shops was opened in 2017 and is located in Warsaw's city center. Highly appreciated by local consumers especially at lunchtime, it features a new format called 'organic bistrot', which offers a selection of dishes and snacks, both sweet and savory, made using the ingredients on sale. The overall offer is made up of 200 products - 50% fresh - most of all organic, natural, gluten and lactose free, including some products for personal care. Customers' loyalty is of utmost importance for the chain and is reached both through a qualified staff and interesting in-store initiatives. "Every month we insert new products in our range," said Slawomir Chlon, ceo of Organic Farma Zdrowia. "And we establish strong and continuous collaborations with our suppliers in order to improve our offer while keeping competitive prices."



Despite meat consumption is on a decreasing trend in most Western markets, it is still one of the staples on Polish tables. To the point that meat is often the number one good in consumers' shopping basket.



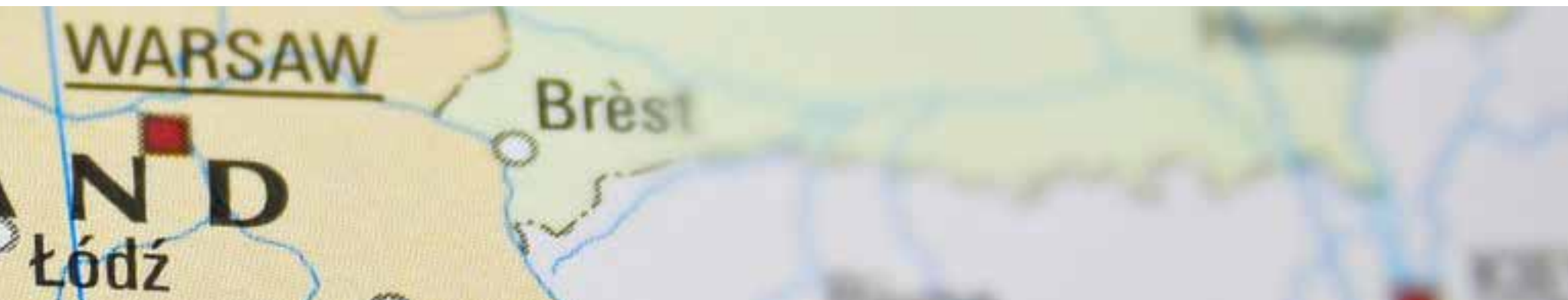
Whole shelves are dedicated to vegetable and non-dairy milk alternatives, as well as to food supplements and superfood ingredients.

The chain's core target are families with children. Indeed, if parents don't always choose organic for their own nutrition, most of the time they choose organic products for their children.



There is a strong presence of Italian organic brands, like Granoro pasta and Alce Nero biscuits, sauces, chocolate and rice cakes.





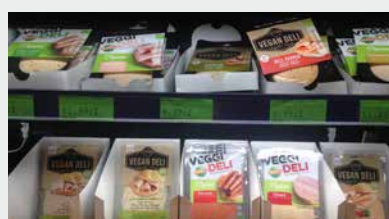
## SMAK NATURY

Smak Natury's story is strictly connected with that of its owner and ceo, Michał Kapica. After the birth of his first daughter, he realized that he couldn't find any healthy food store in the Warsaw area, and this is one of the reasons why he decided to create his own chain in 2003, solely dedicate to natural and organic products, called 'Smak Natury'. The brand is a multichannel company, with three sales departments: two flagship stores; country-wide wholesale distribution; and the on-line store, launched in 2015 but growing fast.

One of the flagship stores is located inside the modern and welcoming Hala Koszyki food hall, that counts 18 restaurants, cafes, street food kiosks and 11 shops. "The store's sales surface is 130 square meters, for about 4,500 products, 94% certificated organic. The average monthly revenue is 55-60,000 euro", said Grzegorz Deptuła, Smak Natury operations director. "Each time we launch a new imported brand, and before adding it to the wholesale range, we provide 'products trial' in our flagship stores: final consumers are the ideal test bench."



Overall, there is few fresh products available, starting from dairy products and cheeses. The shop offers no Italian brands in this segment.



The range of cured meats available is poor. Nevertheless, the products available belong to the Italian brand Pedrazzoli. Much wider, instead, the range of vegan deli slices.



The range of vegetable and non-dairy milk alternatives is rich, with a special mention for the Italian brand The Bridge.



Coconut-based oils and butter occupy a significant space on the shelf.

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# THE INALPI JEWELS



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FOCUS INDUSTRY  
BIO PLANET

The company based in Leszno, near Warsaw, is one of the country's largest producers of organic food. The range is made up of more than 4,500 products, including 350 own brand goods and products imported from around the world and sent all over Poland thanks to 40 temperature controlled trucks and four distribution centers. About 40% of the product range is made of Polish products, the remaining 60% is imported, especially from Germany, Italy, Czech Republic, and France.

In 2017, the company's total turnover reached 26 million euro, up by 400% over 2011, when it was 4 million euro. Sales are mainly directed to specialized shops (75%): more than 1,000 stores. 15% goes to modern distribution and the remaining 10% to foodservice and pharmacies.

"As concerns the most performing product categories, consumer demand is often driven by trends. A few years ago, we faced with a real boom in the sale of organic coconut oil, while now our best-selling product is eggs, followed by vegetal drinks, milk, and dried fruit," said Sylwester Strużyna, ceo of Bio Planet. "But the sector that, in the last period, has achieved the strongest growth is definitely that of fresh produce, first of all fruit and vegetables."



The different parts of the warehouse have different temperature levels for the storage of different kind of products.



Sylwester Strużyna, ceo of Bio Planet.



Shopping baskets are prepared individually for each shop, this way clients are allowed to place small orders of each item.

TOWARD BIOFACH 2019



From left: Barbara Böck, press representative, and Danila Brunner, executive director of Biofach and Vivaness.

The 30th edition of Biofach (presented during an international meeting in Warsaw), world's leading trade fair for organic food, is going to set a new record. For four days - from 13 to 16 February 2019 - the heart of this industry will once again be beating in Nuremberg, Germany. More than 2,900 exhibitors are expected, as well as some 50,000 trade visitors that will be allowed to look forward to an unrivalled product display, inspiring innovations, numerous trends in food and other product lines and a range of networking opportunities. The Biofach Congress 2019 also promises to deliver sound content and high-calibre presentations. This time round, the main conference theme is: "The organic system - healthy in a holistic approach."

"Biofach stands for organic tradition and innovation. It connects the entire sector, from pioneers to newcomers, and for no less than the 30th time in 2019 will provide a unique showcase of the inspiring diversity of the worldwide organic market," says Danila Brunner, Executive Director Biofach and Vivaness. The latter is the International trade fair for natural and organic cosmetics that will feature 260 exhibitors from 35 countries. With another six Biofach events in Japan, the USA, South America, China, India and Thailand, Biofach World has a global presence and year for year brings together more than 3,500 exhibitors and 100,000 trade visitors.

FACTS & FIGURES

10 PAVILIONS

2,900 EXHIBITORS

OVER 50,000 VISITORS

[www.biofach.de](http://www.biofach.de)

Photo: NürnbergMesse

ORGANIC IN POLISH RETAIL

There are 1,100 organic specialized shops in Poland today, 50 only in Warsaw, and the number is expected to increase. In the meanwhile, the competition of large supermarket retail chains - trying to exploit this trend with organic dedicated lines and more space on the shelf - is getting increasingly tougher. Modern retailers take advantage of prices, which according to estimates are between 20% and 100% lower in supermarkets with respect to specialized shops. In addition, consider that 70% of organic food production is exported, while 70% of organic products sold in Poland come from abroad.





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# FOOD RECALLS: A MATTER OF REPUTATION (AND CERTIFICATION)

TO CONSUMERS, FOOD SAFETY IS STRONGLY CONNECTED WITH PRODUCT CATEGORIES AND IS MAINLY RELATED TO INGREDIENTS. THE RESULTS OF A SURVEY CONDUCTED BY MIA SOLUTION.

Do food recalls have a greater effect on consumers' confidence when they involve healthy, organic and protected designation of origin products? And, if yes, why? Finding an answer to these questions was the aim of a paper issued by the Mia Solution consulting company, that investigates consumers' reactions to food recalls which involve different kinds of products, through a comparison of highly processed foods versus foods that claim to be 'healthier'.

"Recent case histories show that the effects of a food harm crisis involving organic product can dramatically damage the whole sector. Above all the E. Coli outbreak due to the contamination of organic sprouted seeds occurred in Europe in 2011 is emblematic," explained Paola Cane, founder and ceo of Mia Solution.

The study combines case history

analysis with insights drawn from 270 Italians, framing a profile of consumers' expectation and reaction to food scandals. The research was conducted using an online questionnaire, in June 2018. Access to the survey was open for three days during which no recalls were announced by the Ministry of Health.

## When recalls turn into emergencies

Food safety concern has dramatically increased in the past decade, in particular regarding incidences of contaminated food products. Concerns have arisen due to the fact that contaminated food products can result in serious risk to the wellbeing and health of consumers, including but not limited to outbreaks of *Listeria monocytogenes*, *Escherichia coli* (E. coli), and *Salmonella*.

"It is commonly accepted that product recalls have a negative im-

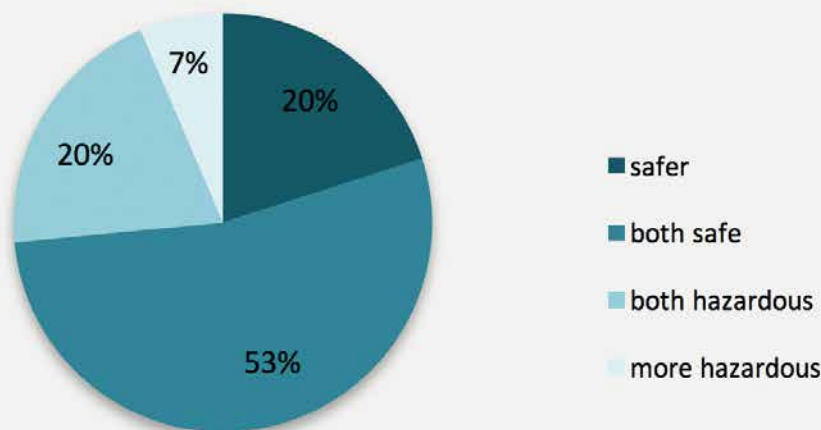


Paola Cane

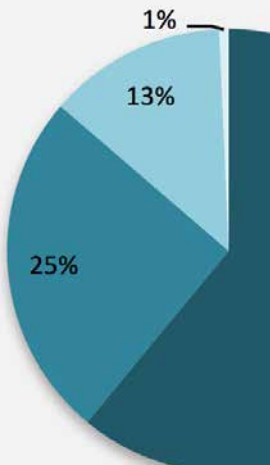
pact on brand reputation, sales and pricing and, in some cases, the public's perception of the food industry as a whole. Current consumer expectation towards food safety is growing. It mainly ranges from the assumption that food not only needs to be safe, but that nutrition shall also contribute actively to improve physical health condition and well-being," said Paola Cane.

In the recent past, some companies have experienced really severe consequences of their food recalls and, in some cases, the survival of the firm itself was at risk. Let's mention the infamous case of Topps, a historic US maker of frozen hamburgers that declared bankrupt just few days after recalling 21.7 million pounds of frozen patties contaminated with E. coli on September 2007. In 1993, another case of contamination nearly forced out of the business the US brand Jack in the Box, when

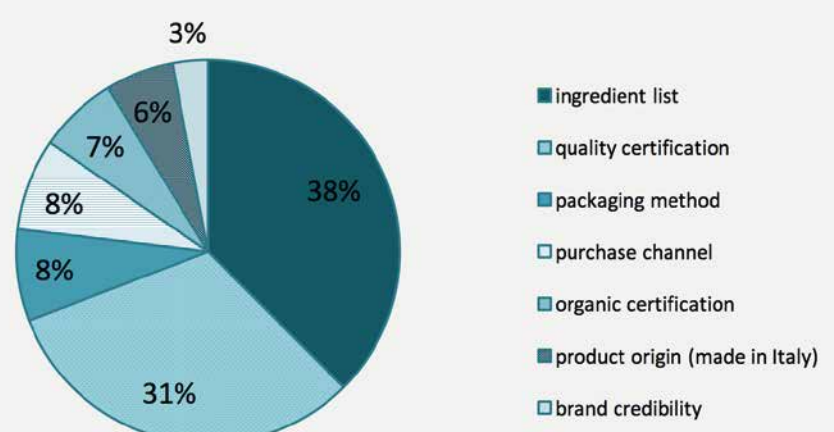
## SUPERMARKET BOUGHTS VS SMALL SHOPS FOOD SAFETY PERCEPTION



## MADE IN ITALY VS IMPORTED FOOD SAFETY PERCEPTION



## FACTORS POSITIVELY INFLUENCING FOOD SAFETY





732 people were affected by one of the most food poisoning outbreak in American history, that caused four deaths, all of them children. In Europe, the benzene contamination of Perrier mineral water resulting in the recall of 160,000,000 bottles in 1990, led to an irrecoverable loss of customer loyalty and quality perceptions and the brand never re-established to pre-recall sales level so that a residual damage in retail and Ho.re.ca. sales still persist nowadays.

**The consumers' point of view**

According to the study, average knowledge of food safety basics is generally good. The majority of respondents know what a food recall is and can define correctly the aim of the procedure. Only 19% of respondents do not associate recall procedures to a health risk, but to generic issues that are not necessarily hazardous to consumers' health. Despite the general attention to the subject, safety is not a predominant concern for the majority of the participants: people are generally optimistic about the safety of food products and are confident that food products are well controlled.

**Richiami alimentari: una questione di reputazione (e certificazioni)**

*I richiami alimentari hanno un effetto maggiore sulla fiducia dei consumatori quando si riferiscono a prodotti considerati 'salutari' o a indicazione geografica protetta? Se sì, perché? Rispondere a questa domanda era l'obiettivo dello studio realizzato dalla società di consulenza Mia Solution, realizzato su un campione di 270 consumatori a giugno 2018.*

13.7% of respondents have a very high level of confidence in food safety and is convinced that the products on the market are pretty safe and controlled; 63.7% has a good level of confidence in food safety. Only 18.1% declares to have a low level of confidence in food safety (respondents in this group are persuaded that products are less sure than they appear) and 4.5% declares to be generally unconfident regarding food safety issues. In respondents' minds, safety is strictly linked to food composition: 37.8% of respondents are convinced that food safety depends on the typology of ingredients included in food. But food safety is also linked to quality and, in particular, to the presence of a quality certification, which is considered by 31% of respondents to be a guarantee of food safety. "While the concept of 'quality' of food is multifaceted and may vary from person to person, depending from aspects such as taste, appearance, cultural traditions, geographical origin of food, 'naturalness', nutritional

values, and ethical acceptability of some ingredients - said Paola Cane - the presence of a quality certification seems to be more objective and appreciated by many."

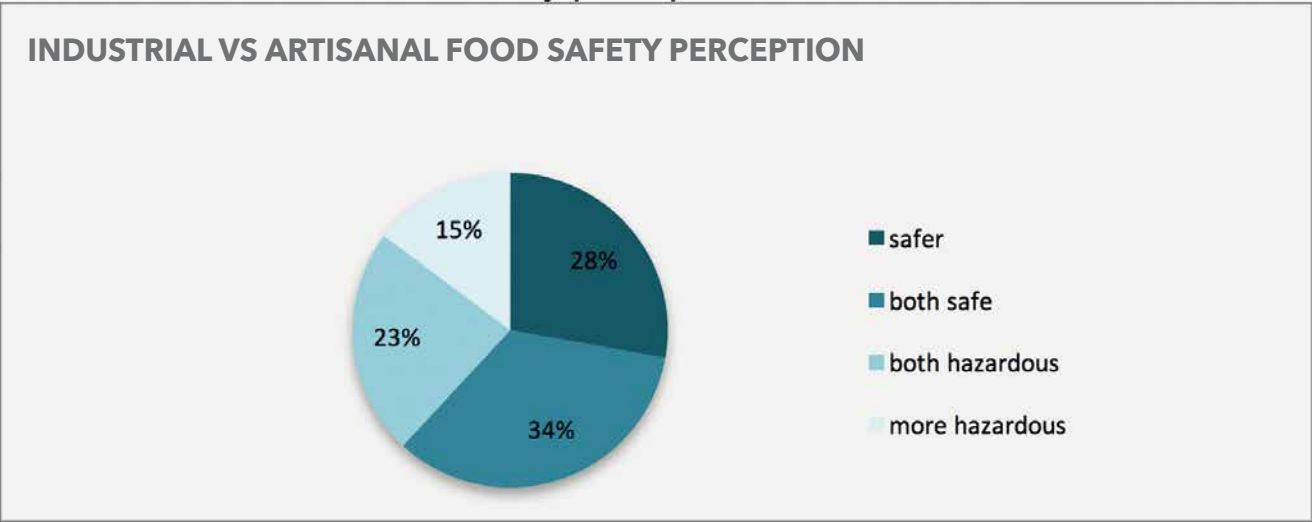
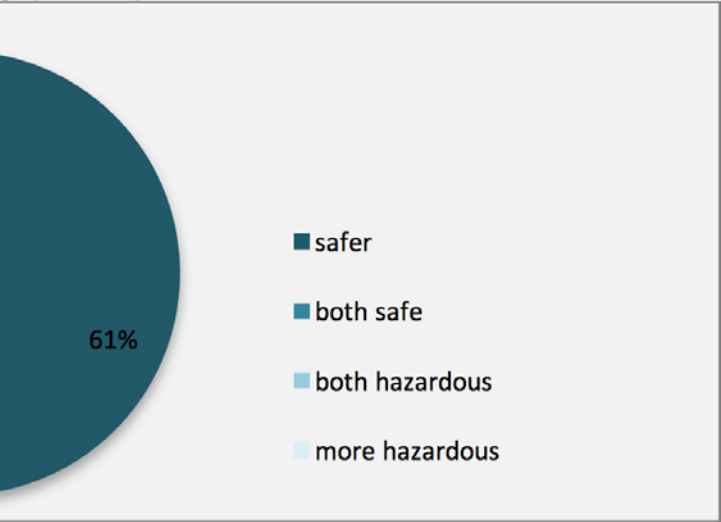
**Certifications: the other side of the coin**

Food safety reputation (in terms of confidence and consumers' expectation) is strongly correlated with the food category and is mainly related with ingredients and presence of a certification. Categories with a stronger safety reputation are typically those that own a certification (organic or designation of origin). When high-reputation categories (e.g., organic, designation of origins, baby food, water) are involved in product recalls, their recalls may be perceived as a bigger aberration. "Our conclusion," said Paola Cane, "is that foods that share with consumers a specific set of values such as integrity, ethics, quality and health, result in a higher degree of confidence on safety. This can easily be a double-edged sword which can result in a far stronger disapproval and concern when the brand fails to keep their promise of health and quality. On the other hand, respondents seem to be less scared about the recalls involving imported food, heavily processed, dairy or cured meat foods and, in the meantime, they expect these products to be more at risk. In fact, food repre-

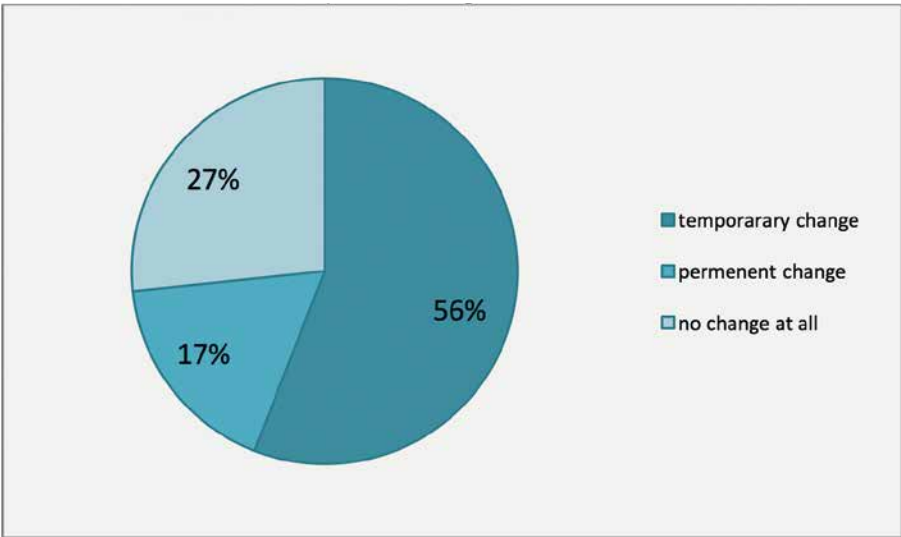
sents not only nourishment but also a set of values, expectations and emotions. People expecting safer and healthier food feel threatened: trust is fragile. Once it is lost, it cannot easily be rebuilt."

**The European E. Coli outbreak**

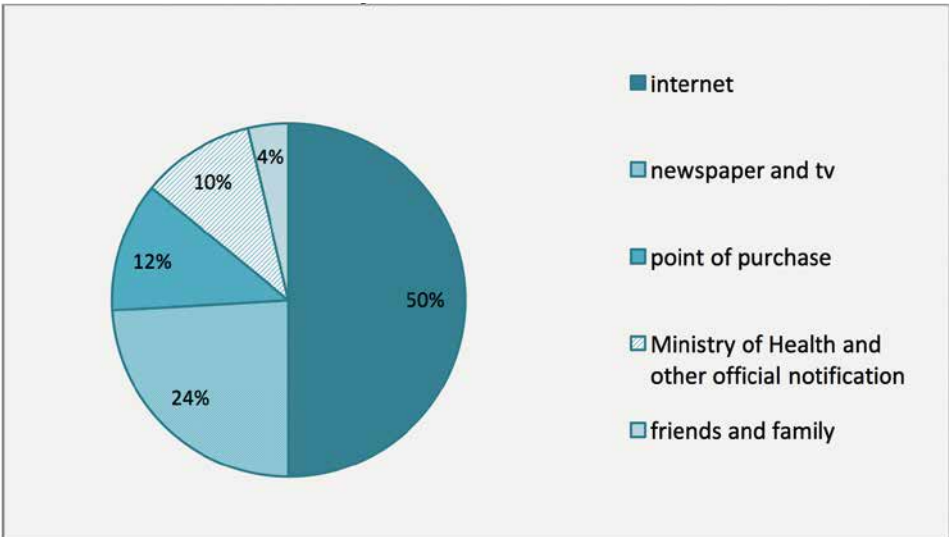
The case of E. Coli outbreak occurred in Europe in 2011 is emblematic of how the effects of a food harm crisis involving organic product can dramatically damage the whole sector. The event occurred due to the contamination of organic sprouted seeds as one of the most severe foodborne outbreaks in Europe that at least involved 15 countries and resulted in the loss of 53 lives and 857 cases of haemolytic uremic syndrome, which can lead to acute kidney failure (Who, 2011). During the first two weeks of the outbreak, reported to be the first on this scale caused by fresh produce in the European Union, losses for farmers in the fruit & vegetable sector were estimated at least 812 million euro (source: Copa-Cogeca). In addition, a temporary export ban on vegetables to Russia occurred, constituting an annual value of 600 million euro. The outbreak changed the eating habits of the majority of the population (DG Sanco, 2011), and it had enormous economic consequences, particularly for farmers producing fresh salad ingredients.



**FOOD RECALLS EFFECTS ON PURCHASING HABITS**



**MAIN SOURCE OF FOOD SAFETY INFORMATION**



Source: Mia Solution





# WHAT FUTURE FOR GLOBAL TRADE?



PROTECTIONISM, CUSTOM DUTIES, INTERNATIONALIZATION OPPORTUNITIES FOR ITALIAN COMPANIES. THE 2018 EDITION OF THE ICE-PROMETEIA REPORT.

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, followed 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 mar-

ket. 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 '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 establish 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 if 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.





### 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

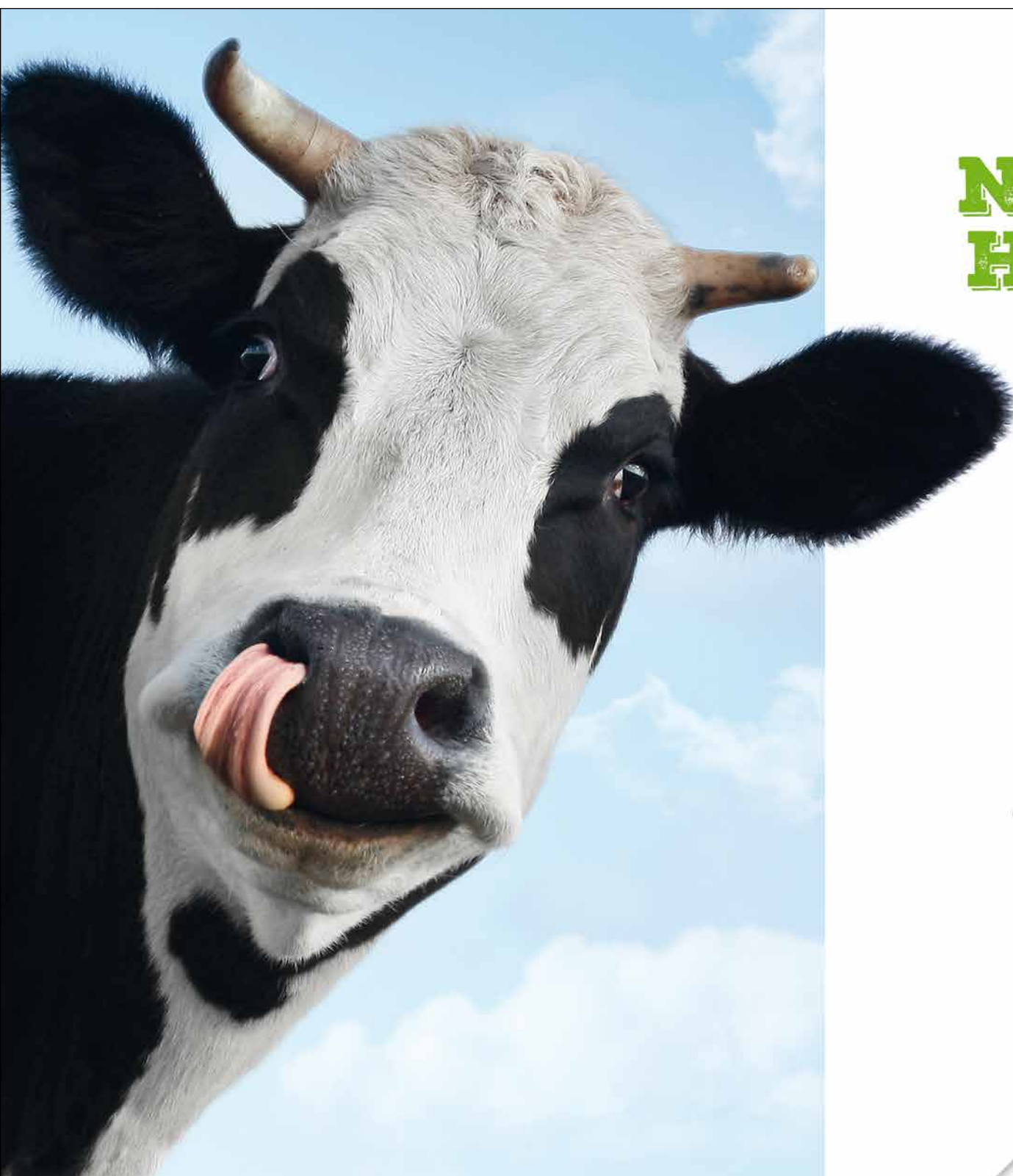
	Values 2017 (mln euro)	% total	% change at constant prices			
			2017	2018	2019	2020
<b>Total imports of manufactured goods</b>	<b>12,460,381</b>	<b>100.0</b>	<b>4.8</b>	<b>4.5</b>	<b>4.1</b>	<b>4.7</b>
Food&beverage	861,418	7.0	4.9	2.6	2.8	3.8
Fashion	861,673	6.9	2.7	3.8	3.5	4.4
Furniture	148,502	1.2	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.



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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. FOOD & BEVERAGE IS THE MOST AFFECTED CATEGORY.

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.

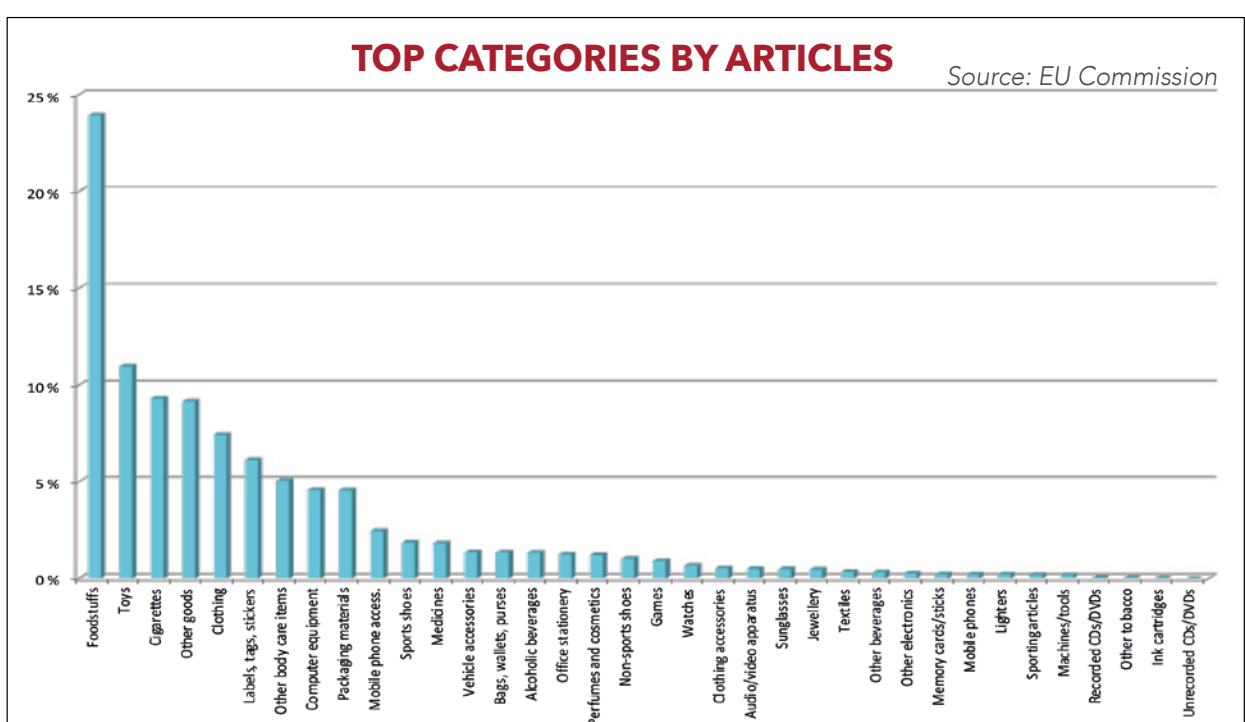
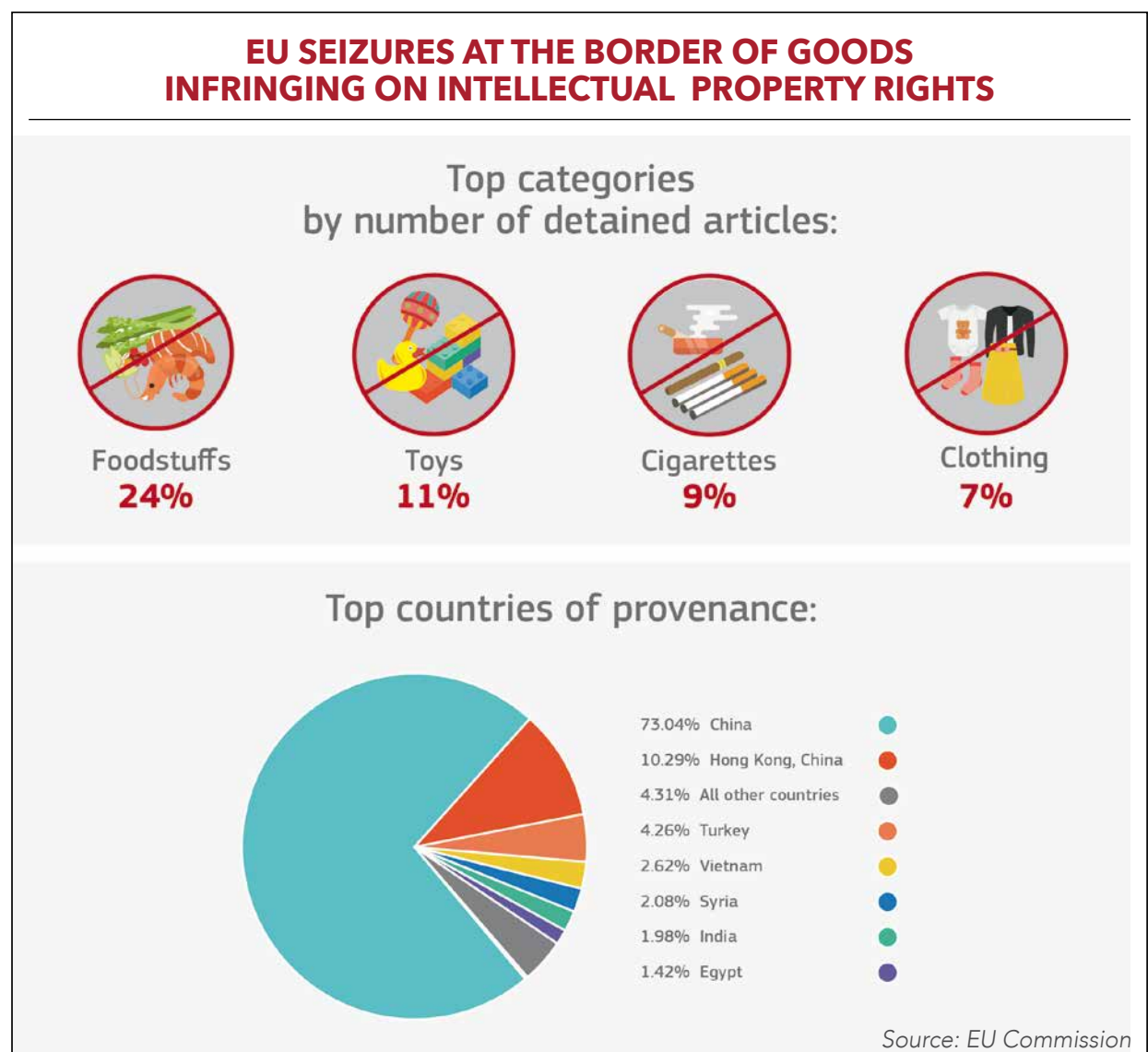
"The EU's Customs Union is on the front line when it comes to protecting citizens from fake, counterfeit and sometimes highly dangerous goods," said Pierre Moscovici, Commissioner for Economic and Financial Affairs, Taxation and Customs. "Stopping imports of counterfeits into the EU also supports jobs 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, fol-



lowed by toys (11%), 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 tran-

sport have remained the most significant means 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.

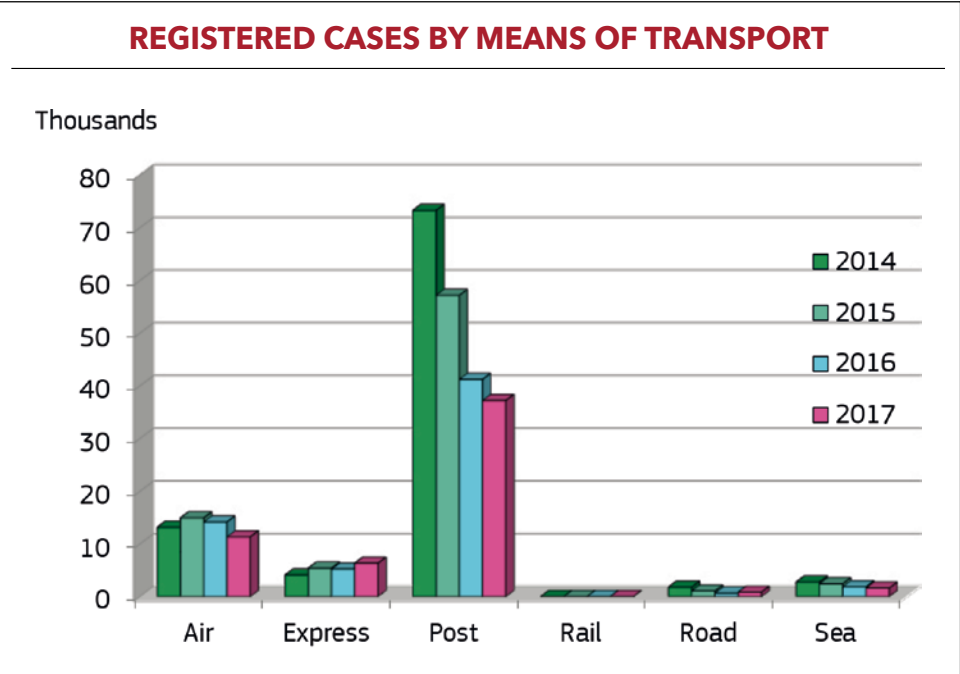
Customs procedures

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/transhipment, with a destination in a third country.

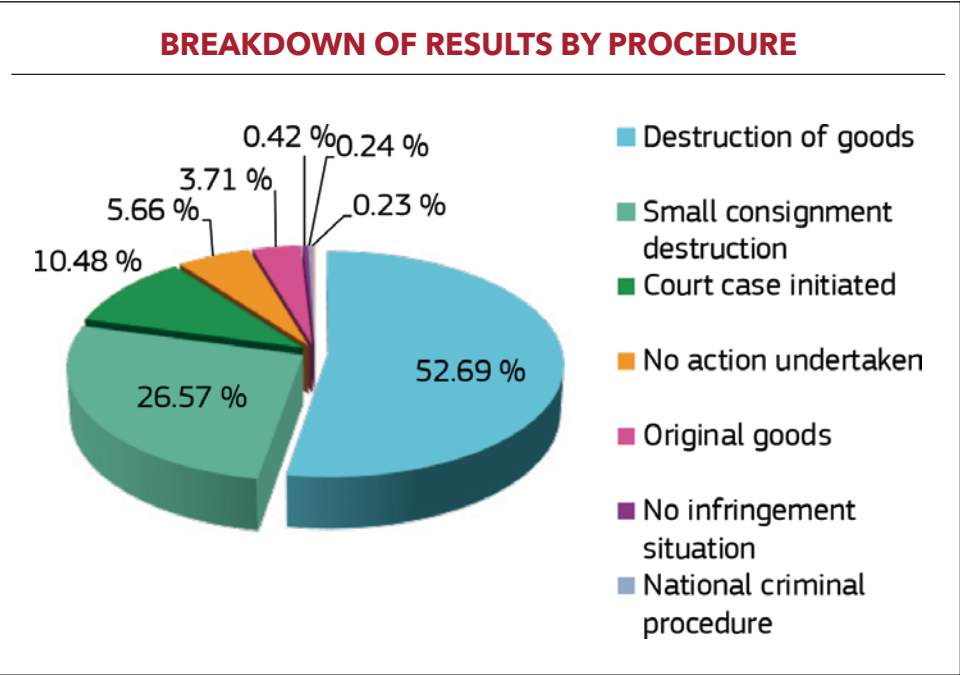
Destruction of goods

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%).



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



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

BREAKDOWN PER PRODUCT SECTOR OF NUMBER OF PROCEDURES, ARTICLES AND RETAIL VALUE

Product sector		Number of procedures	Number of articles	Retail value original goods
Foodstuffs, alcoholic and other beverages:				
1a	Foodstuffs	75	7 519 574	€ 2 274 866
1b	Alcoholic beverages	8	415 670	€ 237 654
1c	Other beverages	6	97 171	€ 90 572

OVERVIEW PER PRODUCT SECTOR OF COUNTRIES OF PROVENANCE

Product sector		Number of articles, not released, in %, according to country of provenance		
Foodstuffs, alcoholic and other beverages:				
1a	Foodstuffs	China 79.87 %	Hong Kong, China 8.19 %	Syria 7.02 %
1b	Alcoholic beverages	Republic of Moldova 90.40 %	Ukraine 6.29 %	Unknown 2 %
1c	Other beverages	United States of America 100 %	-	-

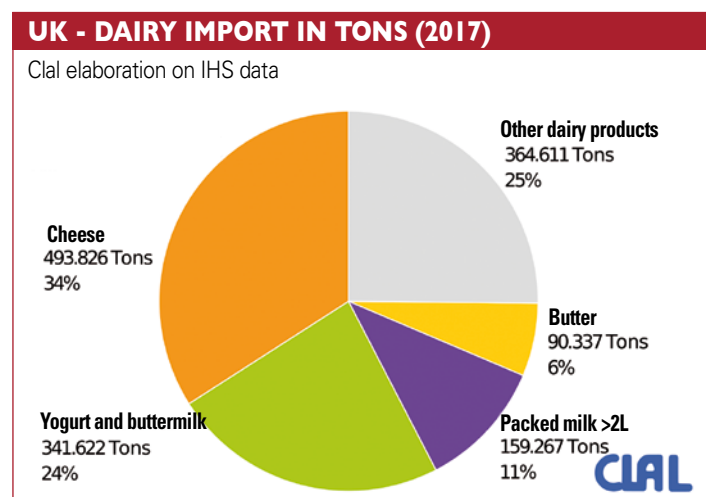
Source: Report on the Eu customs enforcement of intellectual property rights: results at the EU border, 2017

**Merci contraffatte: calano i sequestri in Europa**  
È un calo del 24% quello a volume 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, contro i 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 oggi ben il 43% dei sequestri complessivi.

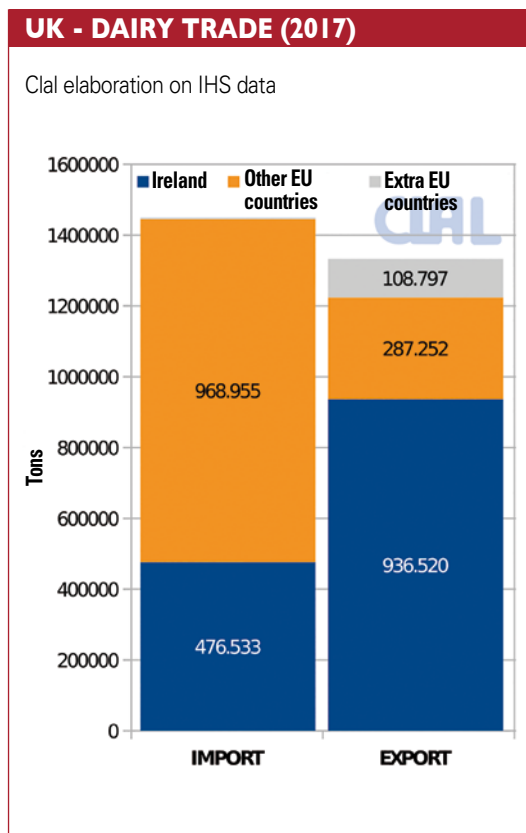


# BREXIT: THE DAIRY SECTOR DEMANDS FOR A DEAL

As established by the referendum held on the 23rd June 2016, there is only a few months left before Brexit, UK's departure from the European Union, and the equally feared transition period. The leave terms and the future relationships with EU member States will be regulated by a treaty negotiated during the past two years between the two parts, amid huge difficulties. A troublesome and not much beloved deal, yet necessary. Clal.it has provided a deep analysis of current trade relationships between the UK and the EU, in order to evaluate the possible impact of UK's leave on the dairy sector and understand the importance of trade agreements.



By value, UK import is on average more than double the size of export. The UK is mainly an exporter of bulk milk; while 34% of total imports are made of cheeses, thus products with a strong value-added.

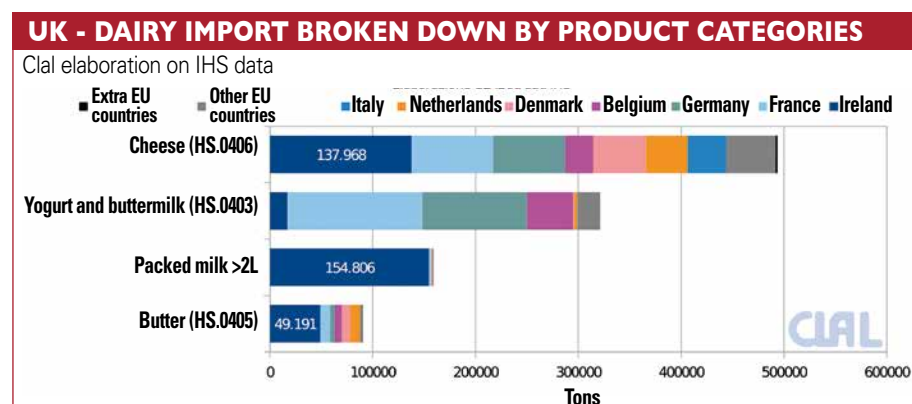


UK dairy import by volume is slightly higher than export. In both cases (import and export) Ireland is the largest trading partner, followed by EU countries. Only a small part of export is directed to extra-EU countries.

## THE IRISH QUESTION

Over 98% of the bulk milk exported by the United Kingdom goes to Ireland.

Northern Ireland, one of the four countries that make up the United Kingdom, exports to the near Eire 620,481 tons of milk - about 26% of total production. Overall, exported volumes reach 755,504 tons of milk, equal to 529 tanks of 27 tons, every week.



Ireland is a big exporter of cheese to the United Kingdom, most of all cheddar (82,267 tons), and is probably the country's sole supplier of bulk milk. In addition, more than half of the butter imported by the United Kingdom comes from Ireland.

The lack of a free trade agreement would prevent the export of more than 775,000 tons of milk to Ireland from the UK, now unable to transform it on its own.

The possibility to export this milk to new markets, outside the EU, is hard to imagine, mainly due to logistics reasons (UK is an island) and high transport costs.

As a consequence, current supplies to Ireland would probably continue also in the absence of an agreement. The price of exported milk, anyway, would be affected by potential duties, with a direct consequence on milk prices.

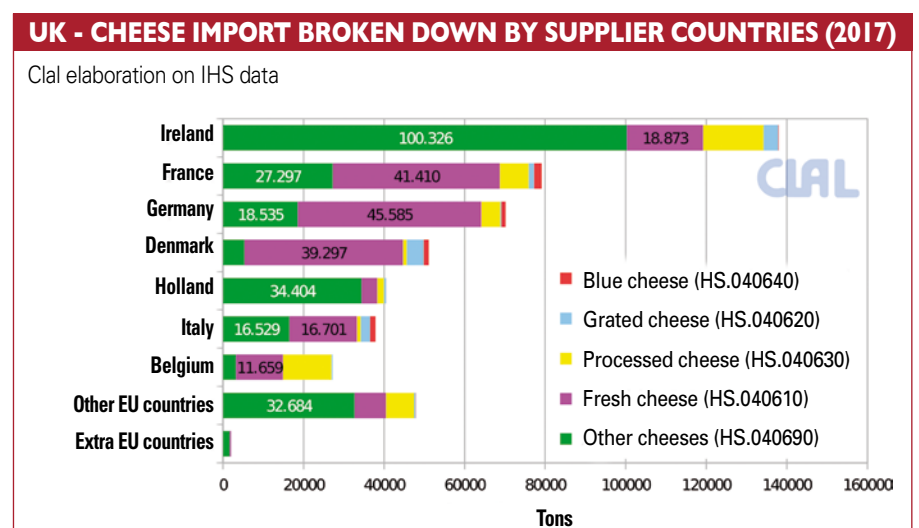
## THE FLAGSHIP PRODUCT: CHEDDAR

Total cheese exports from Ireland, Holland, and Germany to the United Kingdom reached 90,000 tons, equal to about 872,000 tons of milk equivalent\*: 642 tanks of 27 tons every week \*(milk equivalent 9,9641 Kg of milk for 1 Kg of cheese).

In all probability, other dairy products imported by the United Kingdom from the EU may be substituted with goods manufactured in New Zealand, like mozzarella.

**UK IMPORT OF OTHER CHEESES: LEADING SUPPLIERS & PRODUCTS**

IRELAND	NETHERLANDS	FRANCE	GERMANY	ITALY
Cheddar (82%)	Gouda (24%) Edam (22%) Emmentaler (18%) Cheddar (13%)	Brie (29%) Fromage fribourgeois, Vacherin Mont d'Or and Tete de moine (21%) Camembert (16%)	Cheddar (18%) Emmentaler (16%) Edam (11%)	Grana Padano and Parmigiano Reggiano (51%) Goat and buffalo cheeses (19%) Hard non-Pdo cheeses (8%)





AFTER THE LAST ROUND OF NEGOTIATIONS, THE TRANSITION PERIOD THAT WILL TAKE THE UNITED KINGDOM OUT OF THE EUROPEAN UNION IS RIGHT BEHIND THE CORNER. CLAL.IT EXAMINED THE TRADE FLOWS BETWEEN THE TWO COUNTRIES AND THE IMPORTANCE OF A DEAL, ALSO FOR CHEESES AND MILK DERIVATIVES.

## TRADE EXCHANGE WITH THE EU

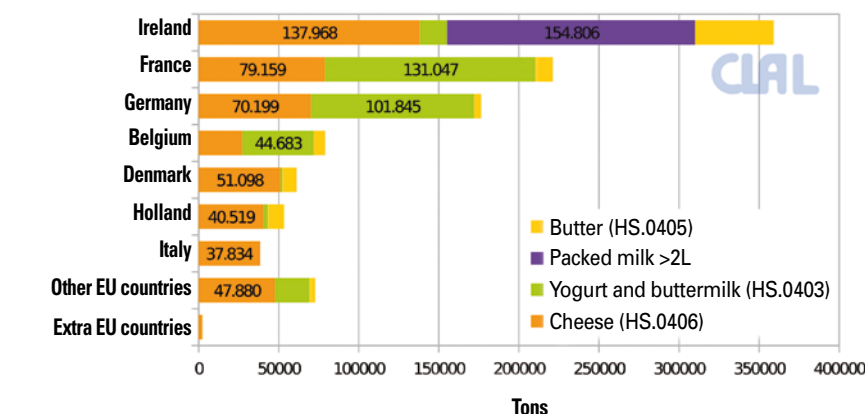
The United Kingdom exports to EU member States - Ireland excluded - 287,252 tons of goods, especially cheeses, mainly to Denmark, France and Holland.

If the UK decided to impose import duties on imported cheeses, EU exports would be severely affected.

Some of the most traditional EU cheeses (like French Brie and Camembert or Italian Grana Padano, Parmigiano Reggiano, and goat cheeses) are probably the hardest to substitute. Cheddar cheese, instead, is widely available on global markets.

### UK - TOP DAIRY IMPORT BROKEN DOWN BY SUPPLIER COUNTRIES (2017)

Clal elaboration on IHS data



EU imports are definitely higher. To the exclusion of Ireland, EU member States export to the United Kingdom 968,955 tons of dairy products, especially cheeses, yogurt, butter, and buttermilk.

## THE THIRD WHEEL: NEW ZEALAND

The foreign country that is more likely going to substitute the European Union in the supply of cheddar is New Zealand. Once belonging to the British empire, it is part of the Commonwealth and, together with the United States, is the second world largest cheese exporter (342,710 tons) after the European Union (829,827 tons).



## WHAT'S NEXT?

If European milk was no longer sold to the UK, this would affect EU milk self-sufficiency rates and, as a consequence, also milk prices not only in Germany, Denmark, and Holland, but also in Southern European countries that are mainly milk importers.

Regardless of political issues, the market is demanding for free trade agreements between the United Kingdom and the European Union able to mitigate the consequences of Brexit on the whole dairy sector.

### Brexit: il lattiero caseario chiede un accordo

Dopo l'ultimo round di negoziati si avvicina a grandi passi il periodo di transizione, che porterà il Regno Unito fuori dall'Unione europea. Clal.it ha analizzato i flussi commerciali fra i due mercati e l'importanza del raggiungimento di un'intesa, anche per il settore lattiero caseario.

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