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In partnership with ITA ITALIAN TRADE AGENCY

THE ITALIAN FOOD MAGAZINE
BUYER'S • GUIDE

YEAR 7 - N° 5 • MAY 2019
MANAGING DIRECTOR: ANGELO FRIGERIO

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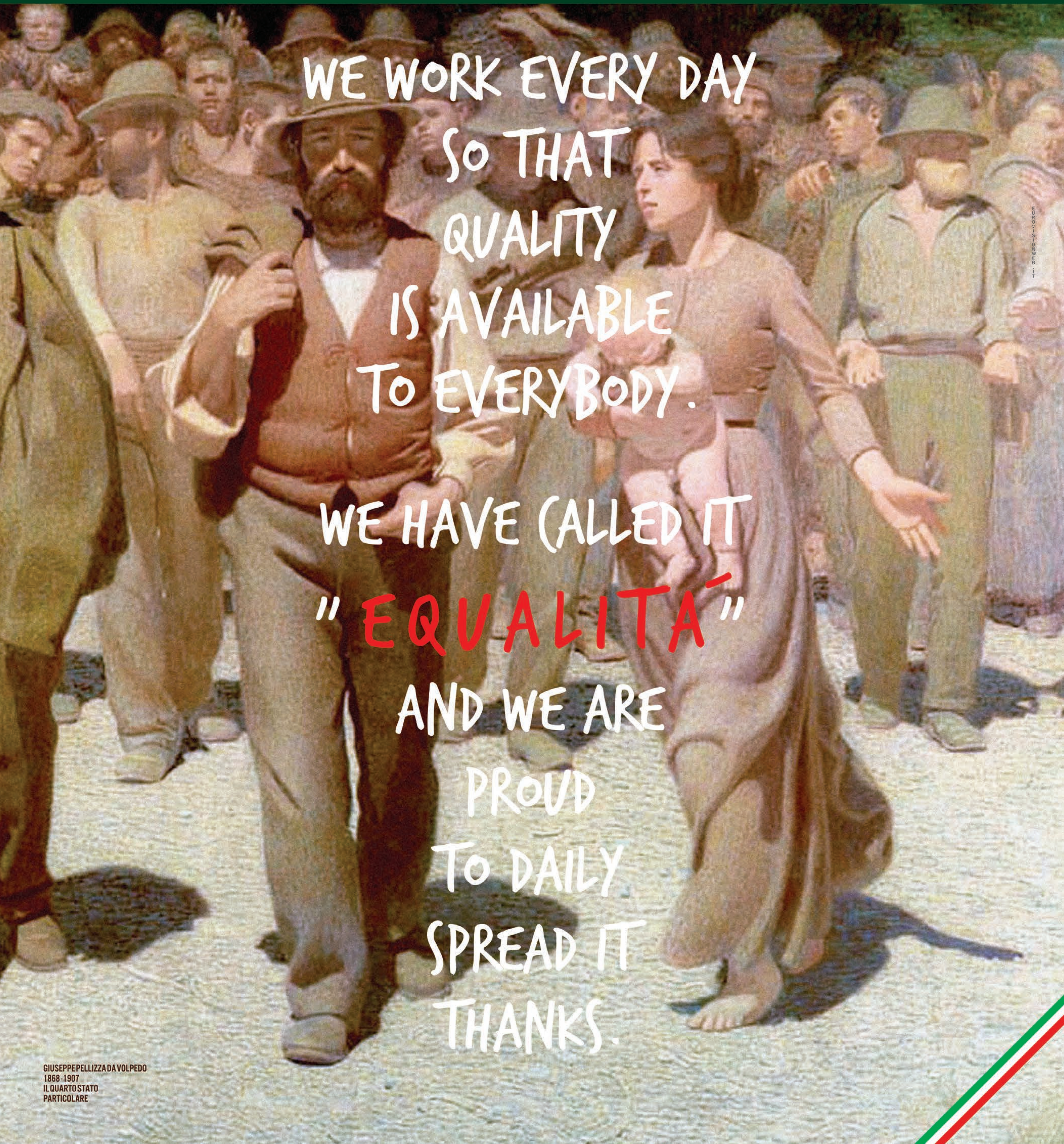
Good Food District

DELICATESSEN AND GASTRONOMY CONTEMPORARY



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PRODUCT PREVIEW

100 GOOD REASONS FOR VISITING TUTTOFOOD 2019

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EDITORIAL

by Angelo Frigerio, managing director

ITALIAN SOUNDING: WHAT IF IT WAS AN OPPORTUNITY?

Parmesan, makkarani, prisecco: these are just some of the 'Italian-style' products that we find on the shelves of supermarkets all over the world. This is the so-called 'Italian Sounding' phenomenon, which means pasta, cheeses, cured meats and other food products whose names look like the original Italian ones, but are not. Often, to cause confusion in the consumer and be more credible, they are also joined by Italian flags. But the 'creativity' of these expert copycats has gone far beyond. On the packaging of these products you can also find the Pisa Tower, the Colosseum, or Venice: images aimed at associating the product with Italy.
In many countries, such behaviors are often considered legal - like in the United States - and therefore they are hardly actionable or subject to criminal persecution. In addition, from a legal standpoint the Italian Sounding differs from counterfeiting. The latter is mainly connected with violations of trademarks, Appellations of origin (PDO, PGI…), logos, design, copyright and the very same product counterfeiting. This has strong implications related to both production and supply chain traceability, which determine severe consequences connected with the use of harmful ingredients and unappropriated production or preservation techniques.
If counterfeiting can be legally prosecuted and actionable, the same thing does not apply to the Italian Sounding, considered to be simply 'evocative': it recalls of an alleged product 'Italianity', that has no foundation and that persuades consumers to associate a local product to Italy.
Italian Sounding is accused of having distortive effects on our economy, yet not everybody agrees. First of all, we should be proud of it. Have you ever heard about Uk Sounding or French Sounding? Italy is the undisputed benchmark for good food and good wine. And we are very glad about that.
There is more: 'copies' often have a quality level that greatly differs from that of the Italian originals. "They are making us some room on the shelves", said a market operator. Because when you try the authentic Italian products, there is no turning back.

ITALIAN SOUNDING: MA NON SARÀ UN'OPPORTUNITÀ?

Parmesan, makkarani, prisecco: sono alcuni dei nomi di prodotti simil-italiani che troviamo sui banchi dei supermercati in tutto il mondo. È il fenomeno dell'Italian Sounding, ovvero di quelle denominazioni di pasta, formaggi, salami o altro ancora che somigliano ai nostri prodotti ma non lo sono. Spesso, per confondere le idee, si associano bandierine tricolori per tentare di rendere più credibile il messaggio. Ma la fantasia dei "copiatori" si è spinta anche oltre. A volte sulle confezioni troviamo la torre di Pisa, il Colosseo, Venezia: tutte immagini che cercano di associare il prodotto all'italianità.
Questi comportamenti sono spesso considerati leciti nei Paesi esteri interessati dal fenomeno, (come gli Stati Uniti) e, pertanto, sono difficilmente perseguibili e sanzionabili legalmente.
Da un punto di vista giuridico poi, l'Italian Sounding si differenzia dalla contraffazione; quest'ultima, infatti, riguarda prevalentemente illeciti relativi alla violazione del marchio registrato, delle denominazioni di origine (DOP, IGP, ecc.), del logo, del design, del copyright, fino ad arrivare alla contraffazione del prodotto stesso. E questo con implicazioni di carattere produttivo e notevoli difficoltà nella tracciabilità della filiera che determinano conseguenze gravi legate all'uso di ingredienti nocivi per la salute ovvero al ricorso di procedure di produzione e/o conservazione non idonee.
Se la contraffazione può essere legalmente impugnabile e sanzionabile, la stessa cosa non vale per l'Italian Sounding; in pratica si tratta di un fenomeno meramente evocativo, con un richiamo alla presunta italianità del prodotto che non trova fondamento nel prodotto stesso e induce il consumatore ad associare erroneamente il prodotto locale a quello autentico italiano.
L'Italian Sounding viene bollato come un fenomeno distorsivo per la nostra economia ma non tutti sono dello stesso parere. Innanzitutto si tratta di un vanto per il nostro paese. Avete mai sentito parlare di un Uk Sounding, o di un French Sounding? È l'Italia il punto di riferimento mondiale per il buon cibo e il buon vino. E questo ci fa piacere.
Non solo: i prodotti "copiati" spesso hanno una qualità lontanissima da quella dei prodotti italiani. "Ci fanno posto negli scaffali": sottolinea un noto operatore del settore. Quando si prova un prodotto italiano "vero" non si torna più indietro.

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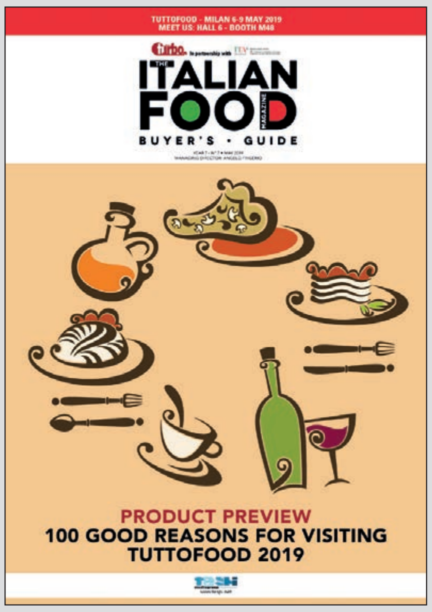

INSIDE

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NEWS

VERONAFIERE LAUNCHES THE WINE TO ASIA PLATFORM, STARTING FROM 2020

'Wine to Asia' is Veronafiere's new multi-channel platform set in motion through a newco in which Veronafiere SpA holds the majority of shares. The only partner is Shenzhen Taoshow Culture & Media, a company belonging to the Pacco Communication Group Ltd based in Shenzhen and also active in Beijing, Chengdu, Xi'an and Shanghai. The b2b event, scheduled for 2020 in Shenzhen, envisages attendance by 400 exhibitors in the start-up stage and will line up from the outset with an international scope and an all-Italian promotional style. The city chosen as home for the new initiative is one of the most dynamic areas of China, a crossroads in the Guangdong-Hong Kong-Macao Greater Bay Area with more than 100 million inhabitants, and accounts for 30% of all wine importers. "The Far East is an area that has to be monitored constantly. Consequently, we have created a permanent initiative, as envisaged in our Business Plan, in the wake of more than 20 years of continuous activity," said Maurizio Danese, President of Veronafiere. "Vinitaly is the strong and widely acknowledged brand for Italian wine in China and we are now working to build an all-Italian style model for promotion in Asia," highlighted Giovanni Mantovani, Ceo of Veronafiere. Pacco Group Ltd is also the co-organiser of CFDF-China Food & Drink Fair and the organizer of the TAO Show - two of the most important b2b events for wine and spirits in China.


From left: Maurizio Danese, Alan Hung, Giovanni Mantovani, Michele Geraci and Federico Sboarina

Veronafiere presenta Wine to Asia: dal 2020 piattaforma multicanale nel Far East
Nasce Wine to Asia, nuova piattaforma multicanale di Veronafiere. L'operazione è stata resa possibile attraverso la creazione di una newco di cui la spa veronese detiene la quota di maggioranza. Partner unico è la Shenzhen Taoshow Culture & Media, società che fa parte della Pacco Communication Group Ltd, specializzata dal 2009 in strategie online e offline di promozione in Cina nei settori wine&food e lifestyle. Con sede a Shenzhen, la società è attiva anche a Pechino, Chengdu, Xi'an e Shanghai. "È un'area da presidiare costantemente e per la quale abbiamo creato un'iniziativa permanente, come previsto dal nostro piano industriale", sottolinea Maurizio Danese, presidente di Veronafiere. "Basti dire che la domanda globale di vino dell'Asia Orientale vale 6,45 miliardi di euro di import (+227% negli ultimi 10 anni) ed è pronta all'aggancio del Nord America, che somma 6,95 miliardi". Terza città per importanza economica dopo Pechino e Shanghai, Shenzhen è una delle metropoli più dinamiche dell'Asia. "L'evento è b2b, prevede nella fase di start up la presenza di 400 espositori e si configura fin da subito con un respiro internazionale", aggiunge Danese. Pacco Group è co-organizzatore del China Food & Drink Fair e organizzatore del Tao Show, il fuori salone del vino di Chengdu: due tra le maggiori manifestazioni b2b sul vino e gli spirits del Paese.

BIG RISK FOR F&B. TRUMP WANTS TO PUT TARIFFS ON EU PRODUCTS FOR 11 MILLION DOLLARS

The Office of the United States Trade Representative, Robert Lighthizer, announced that the United States will introduce duties on a series of products imported from the EU for a value of 11 billion dollars. The reason behind this decision is that, according to the US government, the European Union is financing the European aircraft manufacturer Airbus thus damaging its American competitor Boeing. So far, a preliminary list of products that are likely to be affected has been drawn up which also includes many food & beverage specialties, like: pecorino, cheddar, emmental and other cheeses, yogurt, butter, wines (including prosecco), citrus fruits, olive oil and jam. The US president, Donald Trump, also commented on the issue on Twitter: "The World Trade Organization finds that the European Union subsidies to Airbus has adversely impacted the United States, which will now put Tariffs on $11 Billion of EU products! The EU has taken advantage of the U.S. on trade for many years. It will soon stop!"

Agroalimentare a rischio. Trump annuncia dazi per 11 miliardi di dollari
L'ufficio del rappresentante al Commercio Usa, Robert Lighthizer, ha annunciato che gli Stati Uniti introdurranno dazi su una serie di prodotti importati dalla Ue per un valore di 11 miliardi di dollari. La motivazione sarebbe che l'Unione europea sta finanziando il costruttore europeo di aeromobili Airbus danneggiando così la rivale americana Boeing. Per il momento, pare sia stata stilata una lista preliminare di prodotti che rischiano di essere colpiti e che include anche svariate referenze agroalimentari, quali: pecorino, cheddar, emmental e altri formaggi, yogurt, burro, vini (tra cui il prosecco), agrumi, olio d'oliva e marmellata. Sulla questione si è espresso anche lo stesso presidente Usa, Donald Trump, che su Twitter ha commentato: "L'Organizzazione mondiale del commercio ritiene che i finanziamenti dell'Unione europea alla Airbus abbiano avuto conseguenze negative per gli Stati Uniti, che ora imporranno tariffe sui prodotti europei per 11 miliardi di euro! Per molti anni l'Ue si è approfittata degli Stati Uniti negli scambi commerciali. Questo finirà presto!".

FOURTH YEAR OF GROWTH FOR THE EU AGRO- AND FOOD-INDUSTRY

The value of agro- and food-exports has been growing for the last four years in the EU. According to the last monthly report 'Monitoring Eu Agri-Food Trade', the turnover has reached 11,2 billion euros in January 2019. The main end markets are Usa, China, Switzerland, Japan and Russia. The importations to the EU have increased too, reaching a value of 10,8 billion euros. As a consequence, the total monthly value of the turnover has exceeded 22 billion euros, compared to the 21 billion euros reached in January 2018, with a trade surplus of 0,4 billion euros, instead of the 0,3 billion euros recorded one year ago. If we consider the single trade partners, on annual basis, there has been a considerable increase in the value of the agro- and food-imports from the US (+14%).

In crescita da quattro anni l'export agroalimentare Ue
È in aumento da quattro anni consecutivi il valore delle esportazioni agroalimentari dell'Ue. Secondo l'ultima relazione mensile 'Monitoring Eu Agri-Food Trade', nel gennaio 2019 il giro d'affari ha raggiunto gli 11,2 miliardi di euro. I principali mercati di sbocco restano gli Stati Uniti, seguiti da Cina, Svizzera, Giappone e Russia. Sono aumentate anche le importazioni agroalimentari verso l'Ue, che hanno toccato il valore di 10,8 miliardi di euro. Di conseguenza, il valore mensile totale degli scambi ha superato i 22 miliardi di euro, rispetto ai 21 miliardi di euro raggiunti nel gennaio 2018, con un avanzo commerciale a 0,4 miliardi di euro, rispetto agli 0,3 miliardi di un anno fa. Considerando i singoli paesi partner commerciali, su base annua, è da segnalare la notevole crescita del valore delle importazioni agroalimentari dagli Stati Uniti (+14%).

PARMIGIANO REGGIANO: RECORD IN PRODUCTION IN 2018

The analysis of 2018 highlights a growth in production compared to 2017: +1,35%, or 49,131 cheese wheels. This gives Parmigiano the opportunity to reach an absolute record, closing the year with 3,699,695 manufactured wheels instead of 3,650,562 of the previous year. These are some the data presented on 15th April in Milan by Nicola Bertinelli, president of the Consorzio di Tutela del Parmigiano Reggiano. "2018 was a year of strengthening - said Bertinelli - when we positively run an important increase in production. This was an important test bench because the average production price has lasted and stopped at around 10 euros per kilogram (Parmigiano Reggiano aged 12 months, average production price of 2018)." Export is a key factor, because it is worth more than 40% of the production of Parmigiano Reggiano, with new projects and goals for 2019, beginning with the opening and consolidation of new markets.

Parmigiano reggiano: produzione da record nel 2018
Un bilancio 2018 che evidenzia l'incremento della produzione rispetto al 2017: +1,35%, pari a 49.131 forme. E che consente al parmigiano reggiano di raggiungere un record assoluto, chiudendo l'anno con 3.699.695 forme prodotte contro le 3.650.562 dell'anno precedente. Sono alcuni dei dati presentati lo scorso 15 aprile a Milano da Nicola Bertinelli, presidente del Consorzio di tutela del parmigiano reggiano. "Il 2018 è stato un anno di consolidamento – ha spiegato Bertinelli – nel quale abbiamo gestito positivamente una rilevante crescita della produzione. Un banco di prova importante perché il prezzo medio alla produzione ha tenuto. E si è attestato intorno ai 10 euro al chilogrammo (parmigiano reggiano 12 mesi, prezzo medio alla produzione nell'anno 2018)". Centrale il tema dell'export, che per la filiera del parmigiano reggiano vale più del 40%.

PARMALAT LOSES THE TRIAL AGAINST CITIGROUP: IT WILL HAVE TO PAY 431 MILLION US DOLLARS

Parmalat loses the trial against Citigroup and now it will have to pay the American bank 431 million US dollars, which means roughly 347 million euros. This is what the Court of Cassation has decided about the controversy, which has been going on for more than ten years, so the sentence imposed by the Superior Court of New Jersey on 27th October 2008 has been now perfectly legitimated. With this verdict the supreme judges have dismissed the appeal of the group of Collecchio against the sentence given by the Court of Appeal of Bologna that, on 29th August 2014, had claimed the sentence of the judges of New Jersey to be "ineffective" in Italy. Citi "hopes" that Parmalat "willingly carries out the decision of the Supreme Court, by realising and assigning the shares they now owe to Citi", according to a note written by the the American bank, which reminds that the Parmalat agreement of 2005 establishes the compensation of the credit through the assignation of the shares of the group. Even if the shares belong to a company which is no longer listed on the stock exchange, which means that it is more difficult to to sell them. With this sentence Citigroup is now the only bank which has managed to demonstrate its role of plaintiff in the Tanzi bankruptcy.

Parmalat perde la causa contro Citigroup: dovrà pagare 431 mln di dollari Usa

Parmalat perde la causa contro Citigroup e dovrà pagare alla banca americana 431 milioni di dollari Usa, pari a circa 347 milioni di euro. È questa la decisione della Cassazione in merito alla vertenza, che si trascinava da oltre dieci anni, che ha dato piena legittimità alla sentenza emessa dalla Superior Court del New Jersey, il 27 ottobre 2008. I supremi giudici, con questo verdetto, hanno respinto il ricorso del gruppo di Collecchio contro la pronuncia della Corte di Appello di Bologna. Che, il 29 agosto 2014, aveva dichiarato 'efficace', in Italia, la sentenza dei giudici del New Jersey. Citi, dal canto suo, "auspica" che Parmalat "dia volontariamente esecuzione alla decisione della Suprema Corte, emettendo e assegnando a Citi le azioni Parmalat cui Citi ha ora diritto", si legge in una nota della banca Usa, che ricorda come il concordato di Parmalat del 2005 preveda la soddisfazione del credito attraverso l'assegnazione di azioni del gruppo. Anche se, si tratta di azioni di una azienda oggi non più quotata in Borsa, quindi ben difficili da liquidare sul mercato. Citigroup, con questa sentenza, diventa l'unica banca che è riuscita a dimostrare di essere parte lesa dal crac Tanzi.

BUTTER, BOOM IN SALES: +13% IN THE LAST FIVE YEARS

This is not just an increase, but a genuine revenge. Butter, noble food derived from milk cream, after being restored by medical science for its nutritive values, is now strongly coming back "in force" in the customers' diet and choices. According to the data published by the U.S. Department of Agriculture, the global sales have increased by 13% in the last five years. In the last year, according to Clal.it, the world production has reached an amount of 21 million tons, which means 7 million euros. The largest consumer of butter is New Zealand, with an amount of six kilograms per person every year, followed by Australia (5Kg) and Europe, with no fewer than four kilograms. In Italy in 2017 butter was already coming back as a protagonist of consumers' diet, with a 12.5% increase in sales. This was confirmed in 2018 when the sales of butter in Italy have reached more than 300 million euros. The consumers have chosen especially the premium products, the seasoned butter and the centrifuged butter.

Burro, boom di consumi: +13% negli ultimi cinque anni

Più che di rivalutazione, si può ormai parlare di una vera e propria rivincita. Il burro, nobile alimento derivato dalle panne del latte, dopo essere stato riabilitato dalla scienza medica per le sue numerose qualità nutritive, sta tornando di prepotenza anche sulle tavole e nelle scelte d'acquisto dei consumatori. Secondo i dati diffusi dal dipartimento Agricoltura Usa, le vendite globali sono aumentate del 13% negli ultimi cinque anni. Nell'ultimo anno, riportano i dati Clal.it, la produzione mondiale ha raggiunto 21 milioni di tonnellate, per un controvalore di 7 miliardi di euro. A guidare la classifica dei consumi è la Nuova Zelanda, con sei chilogrammi pro capite ogni anno; seguono l'Australia (5 Kg) e l'Europa, con ben quattro chilogrammi. In Italia, già nel 2017 il burro è tornato protagonista della tavola degli italiani, con un incremento delle vendite del 12,5%. Un dato confermato anche nel 2018 quando la spesa per il burro, nel Bel Paese, ha superato i 300 milioni di euro. Ad essere premiati dai consumatori sono soprattutto i prodotti premium, i burri aromatizzati e quelli di centrifuga.

MORTADELLA BOLOGNA PGI: INTERNATIONAL SALES INCREASE BY 8,6%

Great export results for Mortadella Bologna PGI: among the 33 million kilos sold in 2018, 84% are consumed in Italy and 16% abroad, for an estimated value of 320 million euros. The international sales precisely register a significant increase, equal to 8.6% compared to 2017. This derives from the growing interest of the foreign consumers in the so called Made in Italy, but also from the actions carried out by the Consorzio Mortadella Bologna both in Europe (Germany and Belgium) and in the non-EU expanding markets, such as Japan and Hong Kong. France and Germany (which registered a 33% increase) confirm themselves as the biggest consumers in Europe. Among the non-EU markets, which are now worth 6% of the global amount, there are Switzerland (39%) and East Asia (Japan is worth 13%). "An important year for Mortadella Bologna PGI, which is gaining more and more importance not only in Italy but also abroad thanks to the great work carried out by the Consorzio in some countries that are positively receiving Mortadella Bologna PGI, one of the culinary symbols of Made in Italy in the world", says Consorzio's president, Corradino Marconi.

Mortadella Bologna Igp: le vendite all'estero crescono dell'8,6%

Ottimi risultati per l'export della Mortadella Bologna Igp: dei 33 milioni di kg venduti nel 2018, l'84% viene consumato in Italia e il 16% all'estero, per un valore totale di 320 milioni di euro. E proprio le vendite all'estero registrano un incremento importante, pari al +8,6% rispetto al 2017. Un aumento dovuto al crescente interesse dei consumatori stranieri per il made in Italy, ma anche alle attività che il Consorzio Mortadella Bologna sta portando avanti sia in Europa (Germania e Belgio) sia nei mercati extra europei in espansione, come Giappone e Hong Kong. I principali Paesi consumatori, per quel che riguarda l'Unione Europea, si confermano Francia e Germania (che mette a segno un +33%). Tra i mercati più dinamici fuori dall'Ue, che per ora valgono il 6% del totale, troviamo la Svizzera (39%) e l'Est asiatico (il Giappone vale il 13%). "Un anno importante per la Mortadella Bologna Igp, che si impone sempre di più non solo sul mercato italiano ma anche su quello estero grazie al grande lavoro che il Consorzio sta svolgendo in alcuni Paesi del mondo che stanno dimostrando buona ricettività verso la Mortadella Bologna Igp, uno dei simboli gastronomici del made in Italy nel mondo", commenta il presidente del Consorzio, Corradino Marconi.

PARMACOTTO ACQUIRES CIBO ITALIA ANDA ENTERS THE US

Parmacotto has acquires the food distributor Cibo Italia and created Parmacotto LLC. 70% of the company is controlled by Parmacotto, founded in 1978 in Parma, Italy. The remaining 30% of the LLC is owned by the founding members of Cibo Italia, LLC, Larry Saia and Alessandro Sità, who are now respectively President and Ceo of Parmacotto, LLC. "We have decided to focus on the US market because it presents significant opportunities for the development of our products. In terms of positioning and distribution, our investment in Cibo Italia aims to create synergies with the American market," states Andrea Schivazappa, Ceo of Parmacotto. The company is now focused on the introduction of Parmacotto products in the deli area and as pre-sliced products for retail shelves.

Parmacotto acquisisce Cibo Italia e sbarca negli Usa

Parmacotto ha acquisito il distributore Cibo Italia e ha costituito Parmacotto Llc, controllata per il 70% dalla società emiliana e per il restante 30% dai soci fondatori di Cibo Italia, Larry Saia e Alessandro Sità, rispettivamente presidente e ceo di Parmacotto Llc. "Abbiamo deciso di puntare sul mercato del Nord America poiché pensiamo ci siano ampi spazi di sviluppo per i nostri prodotti. L'investimento nell'acquisto del 70% di Cibo Italia permetterà di sviluppare importanti sinergie che sfrutteranno il posizionamento e la penetrazione distributiva della società americana e l'alta qualità dei prodotti Parmacotto", dichiara Andrea Schivazappa, amministratore delegato Parmacotto. Il piano dell'azienda prevede di raggiungere sia la Gdo americana sia il dettaglio.

FOCUS ON

ARE WE GOING TOWARDS A CASH-FREE SOCIETY?

THE NUMBER OF CASHLESS TRANSACTIONS IS GROWING, ACCORDING TO A REPORT BY THE EUROPEAN HOUSE - AMBROSETTI. ITALY IS AMONG THE COUNTRIES WITH THE HIGHEST NUMBER OF BANKNOTES IN CIRCULATION OVER GDP.

Presented on the past 4th April in Cernobbio (Como) the latest edition of the 'Community Cashless Society' report issued by The European House - Ambrosetti and first created, four years ago, together with Intesa Sanpaolo, Mastercard, Nexi, Poste, Visa, Ibm, PayPal, and Sia. During the presentation, the situation in 85 world economies was outlined. Italy is slowing down with respect to major EU countries, more accustomed to using payment cards. "At the current speed, Italy will reach the EU average in card payments by 2040 (considering steady values in other countries)," says the report, while the organization created in 2015 expected to reach such result by 2025.

Italy among the 'worst' 35

Data show that Italy, compared to the 2018 edition, has worsened from 11.6% to 11.8% in the cash intensity index, which measures the circulation of cash with respect to a country's Gdp. Nevertheless, Italy ranks 32nd place among the 35 worst economies in the world due to its dependence on cash: a 'black list' headed by Gambia (31.2%), followed by Iraq, Albania and Vietnam. Asia, Africa and the Middle East are highly represented in the group, but there are also many European countries: from the 6th place of Hungary (19%), to the 11th of Greece (17.6%) and the 15th of Bulgaria. The list also includes Portugal and Spain, while on the 7th place we find the very civilized and advanced Japan.

By the end of 2018, almost 200 billion euro in banknotes were circulating in Italy, up by 4% over previous year, with a significant increase compared to the 3.8% increase registered in 2017. If we measure the value of ATMs withdrawals, the Italy's yearly +8.1% in the decade 2008-2017 is not comparable to the rhythms of other major EU economies: +2.1% Germany, -1.3% Uk, +2.3% France, +0.5% Spain.

Positive signs from electronic payments

"The rapid spread of electronic payment instruments, which play an increasingly central role for the business and the society alike, may allow Italy to reduce the digital gap with its European competitors and gain significant advantages," the report highlights. Starting from a "greater security of transactions, a reduction of cash costs, the size of the underground economy and a stimulation of consumption and trade." That of electronic payments is a strategic sector, involving 1,600 companies with revenues of 11.7 billion euros in Italy, and 8.2 of added value. Here come the best signals: in the last five years, the number of Pos devices for card payments has increased by 5.1%, at the rate of Germans, and more than France, Spain, United Kingdom (the EU average is 3.5%).

Despite the growth registered in the last five years, card payments - which are worth around 20 billion euro - are still much lower than the 198 billion cash payments. The trend experienced by electronic money is definitely more positive (which is not associated with an Iban, like prepaid cards): Italy was up by 21% in 10 years, and after Luxembourg it is the second EU country for transactions. But even adding the two cashless types of payment, in 2017 Italian ranked fifth-last place in Europe for card transactions: 55.8 per capita, ahead of Germany, Greece, Romania, and Bulgaria.

CASH INTENSITY INDEX 2019: COUNTRIES WITH THE GREATEST CIRCULATION OF CASH OVER GDP

GAMBIA	**31.2%**
IRAQ	**26.9%**
ALBANIA	**26%**
VIETNAM	**19.5%**
ARMENIA	**19.5%**
HUNGARY	**19%**
JAPAN	**18.7%**
LESOTHO	**18.6%**
PAKISTAN	**17.9%**
EGYPT	**17.6%**
GREECE	**17.6%**
HONG KONG	**17.4%**
TRINIDAD AND TOBAGO	**16.6%**
KIRGHIZISTAN	**16%**
BULGARIA	**15.4%**
MALDIVE	**15.2%**
BOSNIA ERZEGOVINA	**14.8%**
LITHUANIA	**14.8%**
PORTUGAL	**14.6%**
IVORY COAST	**13.8%**
SENEGAL	**13.6%**
ARGENTINA	**13.3%**
MOLDOVA	**13.2%**
GUATEMALA	**12.8%**
QATAR	**12.2%**
UKRAINE	**12.2%**
SAUDI ARABIA	**12.1%**
SPAIN	**11.9%**
SLOVENIA	**11.9%**
ITALY	**11.8%**
CZECH REPUBLIC	**11.2%**
NIGER	**10.9%**
AZERBAIJAN	**10.4%**

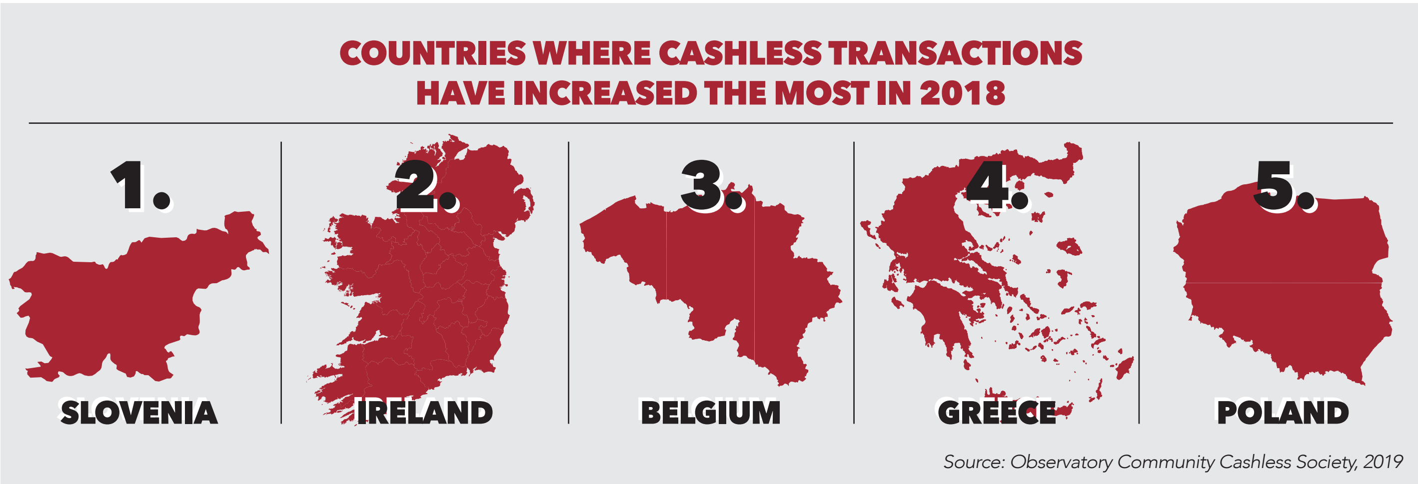
Source: Observatory Community Cashless Society, 2019

The year of strengthening

2019 will be the year of strengthening for digital payments. This is proven by the figures of the first quarter, when operations for a total value of 85 billion dollars were concluded: almost twice the value registered in 2018 (49 billion euro). A dynamism that is also affecting companies and operators. At the end of March, the merger between Worldpay, the largest player in the sector, and Fis, a technology provider for banks, was announced for a value of 43 billion dollars. A similar operation was conducted by First Data, the main competitor of Worldpay, and the provider Fiserv, valued in 39 billion dollars. And in the years ahead, until 2027, the market size is estimated to double, reaching 2.4 trillion dollars.

Does more cash mean more corruption?

The massive use of cash is often associated with criminal behaviors, such as tax evasion and organized crime. In 2018, the Italian deputy prime minister Matteo Salvini raised the hypothesis of abolishing the cash limit, set at 3,000 by the 90/2017 Legislative Decree. For higher amounts, it is necessary to use methods that guarantee the traceability of the sum. Nevertheless, many operators, including several agri-food companies operating abroad, consider this limit a very strict imposition that is badly affecting their business. Moreover, there is a matter of controls: increasing digital payments also mean an increasing monitoring by banks, institutions, and government agencies. Delivering a large amount of data on purchases, preferences and habits to an unidentified 'system' able to monitor all expenses.



Verso una società senza contanti?

Sempre più transazioni cashless, secondo uno studio firmato The European House - Ambrosetti con la collaborazione dei protagonisti della filiera dei pagamenti, tra i quali Intesa Sanpaolo, Mastercard, Nexi, Poste, Visa, Ibm, PayPal, Sia. L'Italia tra i paesi con la maggior circolazione di banconote sul Pil. Ma tante aziende denunciano: "Penalizzati dal tetto a 3mila euro".

ORGANIC 'AMBASSADORS' AROUND THE WORLD

GREAT FLEXIBILITY, STRICT PRODUCTION STANDARDS, AND TOP QUALITY RAW MATERIALS ARE THE SECRETS BEHIND THE GROWTH OF THE GRUPPO GERMINAL. LEADING MARKET PLAYER FOR OVER 40 YEARS.

The Germinal Bio range

The union between two of the best performing Italian organic companies - Germinal Italia and Il Mangiarsano - led to the creation, in 2008, of the MangiarsanoGerminal Group, specialized in the manufacturing of organic savoury and sweet products, ready meals and baby food, also vegan and gluten-free.

"For 40 years, we have been working in full respect of both man and environment, dedicating ourselves to the production of organic, healthy and functional products, made with raw materials coming from controlled supply chains and free from several allergens," said Germinal's sales manager, Paolo Pisano.

Over the years, the company's growth has been constant, allowing the Group to obtain the most important certifications and consolidate its leading position in the bakery and confectionery sector, both in Italy and abroad. In 2015, with the acquisition of a new plant, it started the production of fresh ready meals. And in 2016, thanks to a further expansion of its production facility, it installed a new production line for the creation of savory organic, vegan and gluten-free bakery products. Today, thanks to the experience and strength acquired in the global markets, the 'Gruppo Germinal' is born: widely recognized not only as a brand, but also as a leading manufacturer. The same Group, the same values, with a new dress.

"The Italian organic market is very dynamic, especially in large scale retail (hypermarkets and supermarkets) where it is valued at 1 billion and 300 million euro," said the sales manager. "The greatest contribution comes from the younger consumers: the most likely to choose organic products in their everyday lifestyle. Which is a further signal of how the sector is going to develop in the future."

Gruppo Germinal's R&D department is well equipped with modern tools for the study and development of new products that are always in line with the latest market trends. Furthermore, it produces customized products for its business partners. "We manufacture for some of the largest supermarket chains, both in Italy and Europe, many products under several brands, which are organic, gluten-free and baby food," said Paolo Pisano. Quality is the key focus of the company's activity, and the R&D department is closely monitoring every stage of the production chain, from the selection of raw materials to the finished product that arrives on the shelves.

"In 2018 we presented a lot of interesting innovations, starting from the packaging restyle of the Germinal Bio range," added the sales manager. "In addition, we launched new formulations of existing products and we keep on using original and top-quality flours in the production of both organic and gluten-free foods. And many other product innovations will be launched also in 2019."

The international business

The company's expansion beyond national borders is one of the company's strategic business goals. In so much that in 2017 Gruppo Germinal opened up a new branch in the United States, called Germinal Organic Inc. In addition, a strong focus is set on the Chinese market, where the company is widely recognized for its baby food products. Today, the Group operates in Europe, UK, China, United Arab Emirates, US, Russia, Israel and Japan. Exports account for around 27% of the company's total turnover.

THE FACILITIES

- **Il Mangiarsano** - Almost tripling the size since 2001, when the plant had two production lines, now the facility extends on a 13,000 m2 surface, with 3 automated and highly innovative production lines that allow to produce sweet and savoury bakery products in many different shapes.
- **Creabio** - The production plant for fresh organic ready meals, gluten-free and vegan, is characterised by a flexible technology and a high productivity.

CERTIFICATIONS

Organic, Brc Food, Ifs Food, Fair Trade Usa, Organic, Usda Organic, China Organic, Gluten free, Rspo, Palm done right, Halal, Non Gmo Project.

COME TO MEET US

PLMA
(AMSTERDAM, 21-22 MAY)
HALL 1- BOOTH: F5054
FREE FROM FOOD FUNCTIONAL EXPO
(BARCELONA, 28-29 MAY)
BOOTH: B24

The company's headquarter in Castelfranco Veneto (Treviso)

Ambasciatori del bio nel mondo

Nato nel 2008 dall'unione tra Germinal Italia e Il Mangiarsano, il Gruppo Germinal è oggi uno dei maggiori player italiani nel settore del biologico. Merito di una gamma di prodotti ampia e variegata che si compone di referenze dolci e salate, alimenti freschi ready-to-eat e baby food, il tutto certificato bio.

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FREE TESTS

HPP ITALIA
FOOD SAFETY

CASEIFICIO LONGO: QUALITY AND RELIABILITY SINCE 1950

THE USE OF 100% PIEDMONT MILK AND THE RESPECT OF LONG-STANDING CHEESE-MAKING TRADITIONS ARE THE KEYS TO THE COMPANY'S SUCCESS. WHOSE PRODUCTS ARE DISTRIBUTED IN LEADING ITALIAN AND INTERNATIONAL RETAIL CHAINS.

For exactly 69 years, Caseificio Longo has been producing exquisite cheeses made with 100% Piedmont milk only, according to the best local cheese-making traditions. In state-of-the-art production facilities, located in Alba and Rivarolo Canavese, in the province of Turin, every single production stage is carefully checked and monitored, in order to provide consumers with safe and certified products.

"Even though we use modern equipment, our products continue to be traditional, since they are made according to ancient recipes handed down from father to son for generations," said the company. Tomino is Caseificio Longo's flagship product and the first to be produced by Antonio Longo when he decided to start his business, in 1950. Today, the company's cheeses are widely distributed in Italy all over the world, through an efficient and reliable logistics network.

"In 1950, we daily processed 200 liters of milk. Today, more than 150,000 liters of milk are collected every day in farms located at around 50 km from our dairy," said Caseificio Longo. "Particular attention is paid to respect the environment in every single production process. And the recognized taste and high quality of our cheese is guaranteed by the use of natural ingredients only".

Modern vision, ancient taste

The company's origins date back to the early '50s when, in a small laboratory, Antonio Longo and his wife Franca started producing Tomino del Canavese, hand-made with the milk collected in the nearby farms. This passion and skills were soon handed down to their sons - Maurizio, Dario, and Silvana - and Caseificio Longo's product range soon expanded to include, alongside 'Tomino a Rotolo', the new 'Paglierina' and 'Tomino del Boscaiolo'.

Today, Caseificio Longo's product offer is shared in four big categories. 'The Seasoned': cheese with different seasoning levels, hard structure and full tastes, sweet, spicy and pasty, like Tomino and Tomino del Boscaiolo. 'The Fresh': white soft and moist cheese with compact texture and simple flavor of fresh Piedmont milk, like Tomino a Rotolo. 'The Specialities': the company's gourmet line, made of its most famous cheeses, like fresh Tomino in oil or Toma cubes in oil. 'The Lactose-free': the fresh and delicate taste of Longo's products but with less than 0.1 g lactose.

The company's goal is not only to produce and sell delicious cheese, but also to promote a territory renowned all over the world for its exquisite food and wine production: "One of the most important goals set by the Longo family since the very beginning is to bring new life to ancient tastes of the Piedmont tradition, through the old recipes of rare cheeses," said the company. "This is, in our opinion, the right way to stay connected to our land: generate prosperity and wellbeing by enhancing our most precious heritage in cheese making." Caseificio Longo kept on growing, and in 2010, the Alba production facility was created, where 'Robiola d'Alba' is produced.

From Piedmont to the rest of the world

The quality of Longo cheeses is certified in compliance with the strictest international standards. As of today, Caseificio Longo's cheese are distributed in Germany, France, and the United Kingdom. But the goal is to further enhance the company's global business. First of all, by entering new strategic markets like Switzerland and Austria. Through important partnerships with many importers, the company is able to guarantee a continuous and reliable supply. Features that make Caseificio Longo the ideal partner both for Ho.re.ca operators and grocery retailers. Due to their versatility and freshness, Caseificio Longo's cheeses are perfect ingredient for countless recipes.

Caseificio Longo: una storia piemontese

L'uso di solo latte piemontese al 100% e il rispetto per le più antiche tradizioni lattiero casearie del territorio sono alla base del successo raggiunto, in quasi 70 anni di storia, dal Caseificio Longo. Prodotti realizzati in moderni impianti produttivi, nel rispetto dei più elevati standard internazionali, che sono distribuiti oggi in tutta Italia e in svariati paesi del mondo.

FACTS & FIGURES

Date of foundation: 1950
Location: Bosconero, Turin, Northern Piedmont
Production plants: Alba and Rivarolo Canavese (Turin)
Liters of milk daily processed: 150,000
International certifications: Brc, Ifs

PAGLIERINA

Characterized by a very soft paste and a straw-yellow color, it is named after the traditional maturing process, which takes place on straw. The slightly mouldy rind and short maturing time give Paglierina a unique flavor.

TOMINO DEL BOSCAIOLO

A soft cheese with a smooth, uniform and compact paste and a slightly edible mouldy rind. Made with 100% Piedmont milk, the maturing process provides it with a sweet and slightly spicy flavor. Available also in the speck, bacon and cooked speck versions or 'mignon', in a 15-pieces pack.

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DOSSIER

EUROPE YEAR ZERO

Elections in Europe will be held on 23-26 May, and the round of voting is expected to be a stormy affair. It might cause some tensions in Strasbourg's Parliament, as well as in Brussels' EU Commission. This is mainly due to some crucial issues, starting from the economic ones. The Berlin-Paris axe seems to have suffered the slow down of GDP and the rise of a new sovereignist wave. In addition, besides being accused of 'exaggerated austerity', European institutions have also been 'charged' for not having drawn up some important financial and economic regulations in order to deal with the globalization process. Starting from the single currency - 20 years after its introduction in 19 countries - passing through tax evasion - due to not harmonized taxation systems - that is connected with the boom experienced by the e-commerce. And with the Web Tax that is waiting for an approval…

Europa anno zero

Dal 23 al 26 maggio si voterà nei 27 Paesi dell'Unione. Una tornata elettorale che si annuncia turbolenta. E che potrebbe determinare non pochi scossoni nei Parlamento di Strasburgo e nei palazzi della Commissione a Bruxelles. Sul tavolo, sono svariate le questioni aperte. A cominciare da quelle economiche e dell'asse Berlino-Parigi che sembra inclinarsi, sotto i colpi della frenata del Pil e dell'ondata 'sovranista'. Ma – oltre all'accusa di eccessiva austerità – le istituzioni europee sono finite 'sotto accusa' anche per un'altra serie di mancati provvedimenti in campo economico e finanziario, a seguito del processo di globalizzazione mondiale. A cominciare dalla moneta unica e la sua efficacia – a distanza di vent'anni dalla sua introduzione in 19 Paesi – per arrivare all'evasione fiscale – legata a sistemi di tassazione non omogenei – collegata al boom dell'e-commerce mal regolamentato. Con la Web Tax che attende di essere ancora sbloccata definitivamente…

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20 YEARS OF EURO: GERMANS UBER ALLES, ITALIANS KAPUTT

PUBLISHED THE REPORT ON THE STATE OF THE SINGLE CURRENCY, FROM THE GERMAN THINK-TANK CENTER FOR EUROPEAN POLICY (CEP). A GLANCE AT WHO EARNED AND WHO, INSTEAD, LOST. AND NOT JUST A LITTLE...

Twenty years later, the query returns to the limelight as the refrain of a musical tune: but were the euro and monetary unification a good idea or not? The 'detractors' of the single currency never toned it down and lowered the guard. Like the supporters. But the question remains more controversial than ever. And not only in Italy.

What further fired up the climate was the report drawn up by the German think-tank Center for European Policy (Cep), located in Germany and Freiburg, which certainly makes no mystery of appearing among those 'eurosceptics' bodies. An analytical study whose title says it all: "20 years of euro: winners and losers".

So let's dive into the analysis. According to the Cep, since the euro was born, Germany is the country that has benefited the most. Italy, which is the nation that has lost the most, closes the rank. More precisely, every German citizen has earned an average of 23 thousand euros, every Italian has lost 74 thousand. After reading the report, other indicators have also emerged. The theme of competitiveness among the various countries of the Eurozone appears to be still unresolved, since, unlike the past, individual states (members) no longer have the option of devaluing their currency to stay competitive on an international scale.

The erosion of such competitiveness has heavily affected the economic development (too low in intensity) and has determined both an increase in unemployment (in a context of economic globalization) and a decrease of tax revenue. Therefore, the report takes as an example two countries, Greece and Italy which are both forced to govern a phase of particular difficulty, highlighted by the impossibility of devaluing their own currency.

The analysis outlined by the Cep has also put under the spotlight the dynamics of GDP in the various countries from 1999 to 2017. The report says that Germany has earned a total of 1,900 billion euros in terms of wealth, indeed 23,000 for each citizen. There is also good news for the Netherlands, that posted a 346 billion euro increase, equal to about 21 thousand euros for each resident citizen.

Bad news for the Italians and the French, with the first that have suffered the greatest losses. The negative balance is respectively 73 thousand euros of 56 thousand euros. In terms of wealth, and this amount is to make the wrists tremble, Italy would have lost 4,300 billion euros.

And again: in the overall analysis, the Cep notes that Germany has benefited from its membership of the Eurozone every year, excluding 2004 and 2005, while the greatest profits were manifested during the 2011 crisis.

But beyond the numbers, the analysis also highlights some criticalities which are intrinsic or inside each country, by avoiding the loss of competitiveness only on the single currency. As a matter of fact, it is pointed out that in the years prior to the introduction of the euro, Italy systematically resorted to devaluation instead of implementing adequate structural reforms. The one who did so, as in the case of Spain, certainly could have benefited to reverse the negative trend.

20 anni di euro: tedeschi uber alles, italiani kaputt
Pubblicato il report sullo stato di salute della moneta unica, stilato dal think-tank tedesco Cep (Centre for European Policy). Ecco chi ci ha guadagnato e chi, invece, ci ha perso. E non poco…

THE EUROPEAN CENTRAL BANK

Headed by the Italian Mario Draghi and headquartered in Frankfurt, the European Central Bank (ECB) has the task of implementing the monetary policy for the nineteen EU countries that have joined the single currency by forming the so-called Euro-zone, as well as the policy of supervision of credit institutions. It was established on 1 June 1998, succeeding the European Monetary Institute, with a view to introducing the euro on 1 January 1999.

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WEB TAX: ALL IN THE HANDS OF THE OECD

THE NEXT STEP WILL BE AT THE G20, NEXT JUNE IN JAPAN. THE ORGANIZATION ANNOUNCED THE DEAL REACHED BETWEEN THE 127 MEMBER COUNTRIES, INCLUDING INDIA, CHINA AND THE UNITED STATES, CONSIDERED AMONG THE OPPONENTS OF TAXATION TO OVER-THE-TOP COMPANIES. THE EUROPEAN UNION HAD THROWN IN THE TOWEL, SINCE IT HAD FAILED TO FIND AN AGREEMENT.

Now there is also the 'official' position, given that the European Union has not been able - unlike the painful approval of the copyright law, on the end of term legislation - to find the agreement. Therefore, the theme of the Web Tax ends up in the hands of the OECD. Even more in the face of the announcement of an agreement between the 127 member countries, also including (besides Italy) the United States, which are seen to date as the major obstacle to taxation of Over-the-top companies (Ott), since the most important companies are currently the backbone of the North American economy. The cornerstone of this withdrawal model is the harmonization of taxation no longer based on the residence of the company but on the place where turnover and profits are made. Pascal Saint-Amans, director of the OECD Fiscal Policy Center, remarked that the agreement had the blessing of countries such as China, India and the USA, which had shown more skepticism up to today. We recall that in the end of 2017, the US Congress had reduced taxation from 35 to 21%, and the public administration has found itself coping with lost revenue. The taxation that the US currently imposes on Ott is 13% on incomes: but the US opening is something more than a simple announcement. One of the key steps in the intentions of the provision should be a technical imposition that allows any country to recover at least part of the lost revenue if a company continues to declare its profits in another territory providing a more advantageous rate.

The OECD currently represents 90% of the world economy and the parameters which it will identify in the fight against the tax avoidance of the giants of the digital economy will be subjected first of all to the G20 next June in Japan, which brings together the 19 richest countries in the world and the European Union: once endorsed, they will be translated into the system of each of the 127 States. Some of these, like our country and Great Britain, have, as a matter of fact, already adopted a legislation comparable to the Web Tax, or are working on it, as in the case of France and Spain. Still, less than a year ago, in March 2018, the OECD had taken a position on the topic, by recording the misalignment of some of the most important economies on the planet. Before the G20 that was held in Argentina, the report prepared by the organization declaimed as follows: "The countries that are most committed to putting forward a common proposal, have shown how divergent points of view still exist on this issue". Only a few days were left to the presentation of a proposal by the European Union, a proposal that was then postponed from one Ecofin to another, in the wake of the rift between France and Germany, in a climate of growing wait-and-see policy and then to decide to raise the flag white, putting everything back in the hands of the OECD, as in the classic blame game, given the imminent renewal (but not only) of the political bodies of the European Union.

France has also continued its proposal for an 'internal' Web Tax with the aim of recovering up to 750 million euros. President Emmanuel Macron's goal is to recover money in order to hold off - among other things - the incessant protests of 'yellow vests'. "A tax system for the 21st century must be built on what has value today," said the Finance Minister Bruno Le Maire. Not only: he added that it is also a matter of tax justice, given that digital giants (for example, Google, Amazon, Facebook and Apple) pay about 14 percentage points less tax than European small and medium-sized businesses.

Germany, instead, is more prudent. Up to date it has endorsed the positions of those EU countries (Holland, Luxembourg, Ireland) which are against a taxation because they derive the fruits of the imposition of a lower rate, often studied to attract the investments of the Ott.

In conclusion, last year Italy has had a Web Tax included in the 2019 Budget Law which establishes a 3% tax on the revenues of companies that have a global turnover of over 750 million euros and with revenues in our country higher than 5.5 million euros.

follow


OECD's headquarter in Paris

Web Tax: tutto nelle mani dell'Ocse
L'organizzazione annuncia l'accordo tra i 127 Paesi membri, tra cui India, Cina e Stati Uniti, considerati tra gli oppositori dell'imposizione fiscale alle società Over-the-top. L'Unione Europea aveva gettato la spugna, non essendo riuscita a trovare l'intesa.

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E-COMMERCE, MOST WEBSITES VIOLATE THE EU LAWS

ACCORDING TO A SURVEY CARRIED OUT BY THE EUROPEAN COMMISSION ON 560 INTERNET PORTALS, OVER 60% HAVE IRREGULARITIES AND THEY ARE MOSTLY RELATED TO PRICES AND DISCOUNTS.

The European Commission has published the results of the monitoring of 560 e-commerce websites all dedicated to the sale of physical goods, digital content and services. According to the report, about 60% of the portals have violated to some extent the rules that apply in the EU, mainly in relation to how prices and promotions are presented.

Vera Jourovà, EU Commissioner for Justice, Consumption and Gender Equity, expressed her opinion on the outcome of the research: "Online shopping is a great resource for consumers, but more than half of the websites show irregularities, in particular for what concerns the discounts and the advertising to which they are committed to. This is a problem that must be resolved because today those who buy are often led to take into account a higher price than the one that should be applied. I am horrified by the huge number of e-commerce websites that present these problems, and I hope they are somehow unaware of this behavior. Those who work in e-commerce must respect the rules that the EU imposes for consumer sales. The national authorities, with the assistance of

Vera Jourovà

the EU Commission, will now take the necessary steps to put an end to these unfair commercial activities".

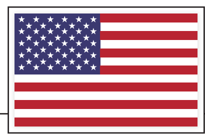
For more than 31% of websites offering discounts, consumer organizations suspect that special offers are not authentic or have found the discounted price quite unclear. On 211 websites, the final fee was higher than the initial price offered. 39% of these operators did not include suitable information regarding unavoidable extra costs on delivery, payment methods, booking fees and other similar additional charges. The EU consumer law forces retailers to present prices including all mandatory costs and, where such costs cannot be calculated in advance, their existence must at least be clearly presented to the final customers.

In 59% of the 560 websites that have been checked, commercial operators have also violated the obligation to provide a link easily accessible to the Online Dispute Resolution (Odr) platform, which is mandatory in accordance with the EU law. As a matter of fact, the Odr allows consumers and retailers to solve disputes without going to court. In about 30% of the internet portals, irregularities were found in relation to the presentation of information on consumers' right of withdrawal, which, instead, must be clearly indicated in the information conveyed to consumers in the event of an online purchase. In conclusion, some irregularities affecting the identity, address and contact details of the trader were detected with shares under 10% of the websites analyzed.

E-commerce, la maggioranza dei siti viola la legge dell'Unione
Secondo un'indagine realizzata dalla Commissione Europea su 560 portali, oltre il 60% presenta delle irregolarità, in massima parte relative a prezzi e sconti.

end

USA: BYE BYE MALL



THE BIG SHOPPING MALLS ARE IN CRISIS. THE REASON: THE BANKRUPTCY OF CHAINS AND THE E-COMMERCE.

They were the symbol of the United States. Just like the wooden houses with the basketball hoop, the Mac Donald's, the Route 66. They are the big shopping malls that popped up like mushrooms in every corner of the States. Huge buildings where you could find anything. The temple of American consumerism, in a nation where 70% of GDP depends on domestic consumption.

Today the shopping malls are in the eye of the storm. Goldman Sachs advised the large corporate investors to sell their shares which refer to real estate operations on the big shopping malls. A disturbing signal that finds its explanation in the following chart, which shows, unequivocally, how much e-commerce has impacted on major retail chains. As a matter of fact, since 2016, 35 of these had to bring books to court. The range goes from the most famous - Sears, Sports Authority, Radioshack – to the more local or regional ones. A massacre of brands, structures, employees.

The tsunami has affected the large shopping malls that hosted these chains. A haemorrhage that led to the closure of many shopping malls or non-Amazonable businesses. Some of them, in fact, in order to occupy the empty spaces, had to host gyms, saunas, indoor spaces for children's parties.

A business that, nevertheless, did not generate the flow of the previous years and forced shop owners to highly lower the rents.

Now comes the Goldman Sachs pummeling. And for the big malls the 'game over' seems to get closer and closer.

Margherita Bonalumi

Usa: bye bye mall

Una volta simbolo stesso del consumismo Usa, oggi gli shopping mall sono nell'occhio del ciclone: Goldman Sachs consiglia agli investitori di vendere azioni che facciano riferimento a operazioni immobiliari sui grandi centri commerciali. Un segnale inquietante, che dimostra ancora una volta quanto abbia inciso l'e-commerce sulle grandi catene commerciali statunitensi.

DEBTOR	FILING DATE	LIABILITIES
David's Bridal	19 november 2018	$500M - $1B
Performance Bicycle	16 november 2018	$100M - $500M
Sears	15 october 2018	$10B - $50B
Mattress Firm	5 october 2018	$1B - $10B
Samuels Jewelers	7 august 2018	$100M - $500M
National Stores	6 august 2018	$100M - $500M
Brookstone	2 august 2018	$100M - $500M
Heritage Home Group	29 july 2018	$100M - $500M
The Rockport Company	14 may 2018	$100M - $500M
Nine West	6 april 2018	$1B - $10B
Claire's Stores	19 march 2018	$1B - $10B
The Bon-Ton	4 february 2018	$1B - $10B
Charming Charlie	11 december 2017	$100M - $500M
Toys "R" Us	19 september 2017	$1B - $10B
Aerosoles	15 september 2017	$100M - $500M
Perfumania	26 august 2017	$100M - $500M
True Religion	5 july 2017	$500M - $1B
Gymboree	11 june 2017	$1B - $10B
rue21	15 may 2017	$1B - $10B
Payless	4 april 2017	$1B - $10B
Gordmans Stores	13 march 2017	$100M - $500M
Gander Mountain	10 march 2017	$500M - $1B
hhgregg	6 march 2017	$100M - $500M
Radioshack	1° march 2017	$100M - $500M
BCBG Max Azria	28 february 2017	$500M - $1B
The Limited	17 january 2017	$100M - $500M
American Apparel	14 november 2016	$100M - $500M
DirectBuy	1° november 2016	$100M - $500M
Golfsmith	14 september 2016	$100M - $500M
Hastings	13 june 2016	$100M - $500M
Aeropostale	4 may 2016	$100M - $500M
Bob's Stores/Eastern Mountain	18 april 2016	$100M - $500M
PacSun	7 april 2016	$100M - $500M
Sports Authority	2 march 2016	$1B - $10B
Hancock Fabrics	2 february 2016	$100M - $500M

HAPPY BIRTHDAY PDOs

SEVEN DIFFERENT CHEESES CELEBRATE THEIR ANNIVERSARY IN 2019. FROM THE FIORE SARDO, WHICH ACCORDING TO EVIDENCES DATES BACK TO 59 B.C., TO GORGONZOLA, BORN IN 879 A.D. AND THERE IS ALSO PARMIGIANO REGGIANO, WHICH HAS BEEN PRODUCED SINCE 1349 A.D.

2019 is a year full of anniversaries. 90 years have passed since that Tuesday, October 29 1919 which saw the ruinous collapse of the Wall Street stock market and marked the beginning of the Great Depression. And only 50 have passed since, on 20 July 1969, Neil Armstrong completed his memorable walk on the moon, and said these famous words: "That's one small step for man, one giant leap for mankind".

And even fewer years have passed since the fall of the Berlin Wall, which took place 30 years ago, or the birth of the European currency, adopted 10 years later: on 1 January 1999. But among all these events in history, there are seven that concern directly with the world of PDO and PGI cheeses, as shown by Assolatte, thanks to the first database of local cultural resources, created by Ismea, which makes it possible to discover their presence in works of art: from ancient texts to paintings, from historical documents to architectural heritage. The 52 Italian cheeses that boast geographical indications are great protagonists of the Italian dairy tradition. But this is not just a cultural matter. In the last five years, in fact, the top ten products, which represent 97% of total volumes, have seen their production increase by 7% and have become increasingly significant for the economy of the Italian dairy sector. From the very fresh (like the Burrata from Andria PGI or the Squacquerone from Romagna PDO) to the ultra-seasoned ones (such as Grana Padano and Parmigiano Reggiano), from the great Italian classics (such as Gorgonzola and Pecorino Romano) to the specialties for experts (like the Ossolano or Casciotta of Urbino), PDO and PGI cheeses prove the great Italian tradition of milk processing, which gave birth to authentic masterpieces of taste, appreciated and sold throughout the world, and with a long (and often curious) history to tell. Just like these seven PDO and PGI cheeses, as Assolatte explains, celebrate as many important anniversaries in 2019.

Buon compleanno, Dop

Sette formaggi festeggiano, nel 2019, il loro anniversario. Dal fiore sardo, che secondo le testimonianze risale al 59 A.C., al gorgonzola, nato nell'879 D.C. E c'è anche il parmigiano, prodotto dal 1349 D.C. Lo segnala Assolatte, grazie alla prima banca dati delle risorse culturali locali, realizzata da Ismea.

59 B.C: FIORE SARDO PDO

The tradition of Pecorino cheese in Sardinia has ancient roots. One of the earliest records dates back to 59 B.C. and it proves the invasion of the southern part of the island written by Diodorus Siculus: "The locals moved away from the conquerors and buried in the mountains and dug underground dwellings, life sustained with the fruit of the flocks, they then had large copy of food and milk and the cheese, they gave them enough food". Over the centuries the production and trade of Pecorino has growing steadily. Several sources indicate that in the nineteenth century the Fiore Sardo was the only cheese to be known and sold on the "continent", above all thanks to Neapolitan, Leghorn and Genoese merchants.

1249 A.D: SPRESSA OF GIUDICARIE PDO

The first historical references to this cheese, which is one of the oldest products in the Italian Alps, are found in the "Rule of Spinale and Manez" of 1249, where "... unum pensum casei sani et pulcri sicci de monte (Spinali)" or "a weight of healthy and beautiful cheese from Mount Spinale" is written. In the following centuries the Spressa is mentioned in several documents, among the parish archives, such as the "Urbario" by Don Marini (dating back to 1915-16) in which the "Spressa da polenta" is cited as a typical cheese.

1789: CASATELLA TREVIGIANA PDO

These cheeses are mentioned in 1789 among the excellent local agricultural products donated by Doge Ludovico Manin to the art of Venetian fruttajuoli. Other written testimonies proving the presence of the Casatella Trevigiana in Venice dated back to the 17th century, like the satire printed in Venice in 1671, which glorifies the "frankness of the first living" of the Venetian hinterland and speaks of simple and genuine food, and very delicious, made with cow's milk, such as "recote and formagiele, foodstuffs from the gods...".

1899: ROBIOLA DI ROCCAVERANO PDO

In a manuscript of 1899, signed by the priest Pistone, we read that in the District of Roccaverano, five annual fairs were held in which "excellent Robiole cheeses" were sold and then addressed to export, which means both sold in northern Italy and in France; one explicity talks about export because Robiola, in those times, was a cheese already known not only in Italy, but also in France.

879 A.D: GORGONZOLA PDO

The date and place of birth of Gorgonzola is still a mystery. There are many theories, among the one according to which it would have been made for the first time in year 879 in Gorgonzola, which has remained for centuries the greatest center of production and trade, where it was made with the milk of the cows returning from the Alpine cottages or the mountain pastures. Since the milk used is the one of the cows exhausted for the transhumance, it is called "green Stracchino" or, simply, "Stracchino of Gorgonzola".

1349 A.D: PARMIGIANO REGGIANO PDO

The contract of agistment of two herds of cows of the monastery of San Martino in Parma, dating back to 1349, is the first known document relating to the production of this cheese. In the same year Boccaccio mentioned in the "Decameron" the "grated Parmesan". Fifty years later, one of his followers, the merchant Sercambi from Lucca, wrote a short story set in a villa in Parma: it is the first document that talks about the request to pay a sexual intercourse with the local cheese. The first prove of the sale of Parmigiano outside Italy dates back to 1389: in fact, the Pisans loaded it on their ships directed to France, Spain and North Africa. The commercial development and the need to protect it led the Duke of Parma to formalize the denomination of origin and the production area with a deed dated 7 August 1612.

1859: BUFFALO RICOTTA FROM CAMPANIA PDO

The production process of buffalo ricotta is described by Achille Bruni, professor of the Royal University of Naples, in his monograph "Del latte e dei suoi derivati" published in 1859 in the Nuova Enciclopedia Agraria: "Once the milk is collected and poured into the tub, the goat's rennet is placed; and when it is thickened with the wooden spatula, it is cut into large pieces. Then the whey is removed with a wooden trowel which is then boiled to make ricotta. This productive technique had ancient origins, dating back to at least the fourteenth century when buffaloes were introduced into the centre and the south of Italy, and boasted an appreciated tradition. This is demonstrated by one of the first and most authoritative quotations of buffalo ricotta, made by Bartolomeo Scappi, cook of the papal court, in the cookery book of the year 1570.

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NOVECENTO

NOVECENTO is an Italian cooked ham product made from large-size pig thighs, selected from those intended for the production of the most famous Italian raw hams.

The thighs are deboned, keeping intact all muscle groups, then massaged gently and steamed.

The peculiarity of this fantastic product is the smoothness on the palate, the slice made up of a lean heart with a delicate taste and a white rim of very sweet and very soft fat which makes the product truly exceptional.

negrisalumi.it

LA CENTENARIA

LA CENTENARIA OVALE SALE E PEPE is the pièce de résistance of the Negri mortadella range, made with pure Italian pork. The whole cylindrical cigar shape and hand binding make it a product, as well as being excellent in taste, also of great aesthetic impact with its 10 kilogrammes of weight.

LA DIVINA

LA DIVINA is a crown of oven-roasted Italian turkey of utmost quality, delicate and fragrant with an unique flavour. This product is ideal for white meat based diets and suitable for catering and high-end gastronomy.

GRAN BONÈ

GRAN BONÈ is produced with a Danish hind of prime quality which is selected and expertly boned through the open technique to remove all the excess fat, keeping all the muscular bands of the pig thigh intact. Gently steam cooked to obtain a superior ham of High Quality.

FIOCCO ARROSTO ALLE ERBE

FIOCCO ARROSTO ALLE ERBE is a pork thigh is nut-free, delicately massaged, with the addition of herbs and spices, slowly steamed and with a light roasting which gives a pleasant taste and a beautiful amber surface.

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TUTTOFOOD
MILANO WORLD FOOD EXHIBITION

MILANO WORLD FOOD EXHIBITION
FIERA MILANO MAY 6-9 MAGGIO 2019
VISIT US HALL 6 - STAND A31-B34

‘DISRUPTION’ IS

RECORD VALUE RISE PUSHES BRANDZ GLOBAL TOP 100 TO 4.4 TRILLION DOLLARS. AND FOR THE VERY FIRST RIME, ALL CATEGORIES REPORTED GROWTH. CHINA ACCOUNTS FOR THE THREE FASTEST RISING BRANDS. TECHNOLOGY, ONCE AGAIN, IS LEADING THE RANK.

The WPP BrandZ Top 100 Most Valuable Global Brands set a record in 2018, increasing 21%: the highest year-on-year percentage increase in a decade, and the greatest addition of value ever - 748 billion dollars -, which takes the total ranking value at 4.4 trillion dollars (up 204% over 12 years, since it was first published in 2006). Despite economic and political uncertainty in many regions of the world, the disruptive effects of e-commerce, the new technologies (see artificial intelligence) and the changed shopping habits, such a surge rippled across every category, without exception. Which is not that surprising, since this edition of the report shows that the most performing brands - that grow faster than even the strongest brands - were also the most innovative and ‘disruptive’ themselves.

The surge of Chinese retail

Having been battered and thoroughly transformed by e-commerce, retail led category value growth for the second consecutive year, with a rise of 35%. Two Chinese e-commerce giants drove the retail surge: JD.com (no.59) increased 94% in value, and Alibaba, 92% (no.9). These two Chinese brands also led the Top 20 Risers, the list of brands that increased most in value year-to-year, followed by another Chinese brand of alcoholic drink Moutai, +89% in value (no.34). Overall, Chinese brands increased 49% in value year-on-year and 1,445% over the past 12 years. Fourteen Chinese brands rank in the 2018 BrandZ Global Top 100, compared with one Chinese brand (China Mobile) 12 years ago.

2018 was also the first year non-US brands grew faster than US brands. The total value of China’s Top 10 grew year-on-year by +47%, more than double that of the US brands (+23%). Other parts of the world, such as India and Indonesia, are also (...)

WHAT ABOUT ITALY?

‘Made in Italy’ brand value continues to grow year-on-year, due to the strong international market presence of well-known Italian brands. According to the 2019 BrandZTM Top 30 Most Valuable Italian Brands ranking by WPP and Kantar, Italian brands have increased their brand value over the last 12 months by 14% to 96.9 billion dollars.

Luxury fashion label Gucci tops the ranking and is 2019’s fastest riser, growing by a staggering 50% to 24.4 billion dollars over the last year. Completing the Top 5 brands are telecom provider TIM (no.2 9.41 billion dollars), energy company Enel (no.3 7.94 billion dollars), chocolate confectioner Kinder (no.4 6.80 billion dollars), and luxury sports car manufacturer Ferrari (no.5 4.75 billion dollars).

BrandZ analysis found that Italian brands have an exceptionally strong presence throughout the world with 10 brands in the Top 30 having 90% or more of their exposure overseas (a combination of revenue, volumes sold and profitability from overseas). In addition, ‘Brand Italy’ performs exceptionally well, in part due to the heritage, authenticity and associated lifestyle of many of the brands. Innovation is by far the largest driver of brand value growth in Italy. Those brands seen to be most innovative grew their brand value by 17%, compared to the 1% growth seen by brands regarded as less innovative.

Luxury contributes the largest proportion of the ranking’s value by far - almost 40% - driven by Top 10 brands such as Gucci, Prada and Armani. After Luxury, Food and Dairy contributes the most value to the ranking. The presence of Kinder (no.4), Nutella (no.8), Ferrero Rocher (no.11) and Barilla (no.26) shows the effectiveness of Italian entrepreneurs who have turned single-product brands into global category giants.

Parola d’ordine: ‘disruption’

WPP e Kantar Millward Brown presentano il ranking annuale BrandZ Top 100 Most Valuable Global Brands, che identifica i 100 brand di più alto valore del mondo. Lo scorso anno, la classifica ha fatto registrare una crescita record del 21%, per un valore di 4,4 trilioni di dollari. Retail e tecnologia sono le categorie più performanti: Google (+23%) e Apple (+28%) mantengono il primo e il secondo posto della classifica, seguite da Amazon (+49%) al terzo posto e Microsoft al quarto (+40%). Tencent sale al quinto (+65%), prima di Facebook (+25%). In Europa e Italia è il lusso a trainare la crescita, così come i brand del mondo food&wine.

HIGH LIGHTS

NORTH AMERICA continued to dominate the ranking in number of brands

(57)

and proportion of value

(+71%)

Over the past **12 YEARS** technology-related brands increased in proportion of value: from

37% IN 2006 TO **56%** IN 2018

THE KEYWORD

by Federica Bartesaghi

follow

RETAIL
INCREASED
35%
IN VALUE
making it the fastest-rising category for the second consecutive year

ASIA
led the regions in rate of growth, rising
42%
Brands from North America, primarily the US, rose
23%
IN VALUE

The Chinese e-commerce giant JD.com was the
FASTEST RISING BRAND
(+94%)
followed by
ALIBABA
(+92%)

'DISRUPTION' IS THE KEYWORD

(...) showing strong regional growth. The BrandZ Top 100 included seven Asian brands (excluding China), which grew +14% giving them a total brand value of 146 billion dollars.

Technology: the undisputed leader

Although the retail category led the ranking in percentage value growth, the technology category continues to dominate the rankings in actual value contribution. Eight out of the Top 10 are technology or tech-related brands. Technology added 348 billion dollars in value to the BrandZ Global Top 100, while the retail Top 20 increase by 149 billion dollars.

Google and Apple retain the number 1 and 2 spots, growing +23% to 302.1 billion dollars and +28% to 300.6 billion dollars respectively. Amazon moved into the no.3 position ahead of Microsoft, growing +49% to 207.6 billion dollars, while Tencent rose to no.5 ahead of Facebook (no.6) growing +65% in brand value to 179 billion dollars, up three places from last year's ranking.

"Brands that are winning in the intelligence-led marketing era include businesses such as Amazon and Tencent who put the consumer at the heart of everything they do," said Doreen Wang, Kantar Millward Brown's Global Head of BrandZ. "These brands use technology to understand the needs of their consumers and apply these learnings to create an ecosystem of services that fulfil multiple needs, enabling a seamless consumer experience between platforms."

Luxury is driving growth in Europe

The Continental Europe Top 10 rose 15% in brand value, mainly due to the fortunes of the luxury category. The luxury category, alone, increased 28%. Half of the Continental Europe Top 10 are luxury-related. Three are in the luxury category: the French Louis Vuitton (+41% in brand value) and Hermès (+20%); and the Italian Gucci (+66%). The two car brands, both German, are luxury: Mercedes and BMW. Factors influencing the rise in luxury brand value included a strong global economy and the rebound of China.

FOCUS ON

RETAIL

Retail had a good year, but not all retailers. Those that effectively mixed online with offline did well, and the e-commerce leaders did even better. The retail category increased 35% in brand value, more than double the 1% rate of a year ago. But three of the BrandZ Retail Top 5 drove much of the gain, with no. 1 Amazon up 49% and the two Chinese e-commerce leaders, Alibaba and JD.com, rising 92% and 94%, respectively.

BrandZ™ Top 100 Most Valuable Global Brands 2018

Category Brand Value Year-on-Year Change

+35%

Category Brand Value 12-Year Change

+274%

Retail Top 20 Total Brand Value

$578.0 billion

RETAIL TOP 20

		Brand Value 2018 $ Million	Brand Contribution	Brand Value % Change 2018 vs. 2017
1	Amazon	207,594	4	+49%
2	Alibaba	113,401	3	+92%
3	The Home Depot	47,229	3	+17%
4	Walmart	34,002	2	+22%
5	JD.com	20,933	3	+94%
6	Costco	18,265	3	+12%
7	IKEA	17,481	3	-8%
8	Ebay	14,829	3	+20%
9	ALDI	13,785	3	+12%
10	Lowe's	13,111	3	-2%
11	7-eleven	9,227	4	+1%
12	Tesco	9,079	4	+13%
13	Walgreens	8,842	3	-13%
14	CVS	8,450	3	-13%
15	Lidl	8,219	2	+14%
16	Target	7,620	3	-12%
17	Whole Foods	7,088	5	NEW
18	Woolworths	6,880	4	+5%
19	Carrefour	6,607	3	-3%
20	Falabella	5,373	5	NEW

Source: BrandZ™ / Kantar Millward Brown (including data from Bloomberg)
Brand Contribution measures the influence of brand alone on earnings, on a scale of 1 (lowest) to 5 (highest).

FAST FOOD

The fast food category rose 13% compared with a 7% increase a year ago. Burger chains drove the increase, with McDonald's and Burger King rising 29% and 28%, respectively. Underpinning these results, and the strong 18% rise of Domino's Pizza, was recognition of consumer priorities: better taste, healthier ingredients, and improved customer experience, enabled by technology.

BrandZ™ Top 100 Most Valuable Global Brands 2018

Category Brand Value Year-on-Year Change

+13%

Category Brand Value 12-Year Change

+375%

Fast Food Top 10 Total Brand Value

$242.4 billion

FAST FOOD TOP 10

		Brand Value 2018 $ Million	Brand Contribution	Brand Value % Change 2018 vs. 2017
1	McDonald's	126,044	4	+29%
2	Starbucks	44,503	4	+1%
3	Subway	18,766	4	-14%
4	KFC	15,131	4	+12%
5	Domino's Pizza	7,446	3	+18%
6	Pizza Hut	7,372	3	-9%
7	Tim Hortons	6,904	5	+17%
8	Burger King	6,555	3	+28%
9	Taco Bell	5,213	3	-3%
10	Chipotle	4,422	4	-23%

Source: BrandZ™ / Kantar Millward Brown (including data from Bloomberg)
Brand Contribution measures the influence of brand alone on earnings, on a scale of 1 (lowest) to 5 (highest).

end

100+ GOOD REASONS FOR VISITING TUTTOFOOD 2019

Fiera Milano, 6-9 May

by Federica Bartesaghi

In just 6 editions, the international trade show dedicated to food & beverage has turned into a strategic opportunity, for Italian companies, for showcasing their latest innovations to national and foreign buyers. Here is a preview of the new products that will be on stage in Milan.

follow

CHEESE

CASEIFICIO VAL D'AVETO
www.caseificiovaldaveto.com

Hall: 10 • Booth: E36 - 38

Stracciatella with Yogurt

Product description
Fresh spun dough made from pasta filata cheese from cow's milk and white yogurt.
Shelf life
16 days.
Packaging details
Plastic packaging, dry weight 125 g.

VALGRANA
www.valgrana.com

Hall: 10P • Booth: D06 - E07

Piemontino cheese

Product description
Hard cheese characterized by a cooked paste reaching a slow maturity. It is produced all year long and may be used both for dining and grated. It is produced with 100% Piedmont milk, without lysozyme and its seasoning is more than 15 months.
International certifications
Iso 9001 / Iso 22000: 2005.

AGRIFORM SCA
www.agriform.it

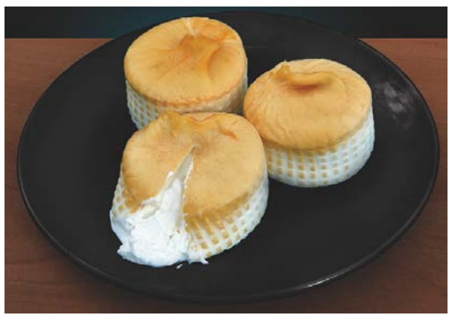
Hall: 10P • Booth: A22 - B23

Grana Padano PDO from the Lessinia Mountains

Product description
Paper-wrapped 200 g Grana Padano PDO from the Lessinia Mountains originates from the synergy between the Agriform cooperative and the Dalla Valentina dairy - located at an altitude of 1.150m - with the aim of providing the final consumer with a high-quality product. The cheese is made exclusively using milk from the Lessinia mountains - natural park north-east of Verona - and is aged for over 16 months.
Shelf life
12 months.
Packaging details
200 g fix weight, paper-wrapped vacuum pack.
International certifications
Brc Grade A, Ifs Higher level, Uni En Iso 9001:2015.

CASEIFICIO ARTIGIANA
www.caseificioartigiana.com

Hall: 10P • Booth: A30 - B31



Smoked Burrata

Product description
Smoked burrata is a tasty alternative to the classic Apulian burrata, produced entirely by hand. Burrata is a fresh smoked cheese, made with raw cow's milk. Its shape resembles that of a small 'sack' of soft spun dough, which encloses a heart of mozzarella frayed by hand in thin threads (stracciatella) mixed with a cream of fresh cream. It is characterized by an amber color obtained by the beech wood smoking process.
Packaging details
Packaged in a plastic cup or a tray. 125 g.
Shelf life
18 days from production date.

VALCOLATTE
www.valcolatte.it

Hall: 10 • Booth: L10 - M13

RiCcotta

Product description
Tasty ricotta made with 100% Italian milk, with a low fat content (18%) and only 205 kcal.
Shelf life
30 days from date of production.
Packaging details
RiCcota has a fixed weight of 250 g and is packed in an old-fashioned pot that gives it an artisanal touch.
International certifications
Brc, Ifs.

BUSTI FORMAGGI
www.caseificiobusti.it

Hall 10 • Booth: F02 - G05

Organic Pecorino with aromatic herbs and vegetal rennet - edible rind

Product description
Inspired by ancient Medieval traditional methods, once matured the cheese is treated with extra virgin olive oil and sprinkled with a mix of aromatic herbs, such as rosemary, mint, sage, savoury, basil and coriander. The rind is therefore edible and the use of vegetal rennet makes it suitable for people following a vegetarian diet.
Packaging details
1,000 Kg.
Shelf life
120 days.

CASEIFICIO PREZIOSA
www.mozzarelladiseriate.it

Hall: 3 • Booth: G01 - H04

Fior di latte

Product description
Spun paste (Pasta filata) cheese with a spherical shape. External appearance is smooth, inside it has an elastic consistency, white color, scent of milk and typical flavor. Made with selected 100% milk from Lombardy. Also available in other sizes.
Shelf life
20 days at +4°C
Packaging details
200 gr, packed in a thermo-sealed plastic film with a protective liquid.
International certifications
IT 03/348 CE.

CHIODO F.
www.chiodoformaggi.it

Hall: 10 • Booth: C48 - E47

Black Sardo

Product description
The Black Sardo cheese belongs to the BlackEdition line, aimed at enhancing a selection of top quality products characterized by unique tastes and flavors. It is made with sheep milk collected and processed in Sardinia. The rind is black, while the paste is white, soft and elastic.
Shelf life
24 months.
Packaging details
3 kg.

LATTERIA DI CHIURO
www.latteriachiuro.it

Hall: 6 • Booth: E31 - E37

Mozzarella Lattellina Gold

Product description
Mozzarella Lattellina Gold with 100% Valtellina fresh milk from Italian alps: new size, new taste. Made with fresh milk from the company's dairy farmers in Valtellina, Mozzarella Lattellina Gold is produced according to the highest quality standards with a short supply chain that is constantly monitored to respect both the environment and animal welfare.
Shelf life
18 days.
Packaging details
Primary packaging: multilayer paper cup. 6 pieces per carton.
International certifications
Ifs Food.

CILENTO
www.cilentospa.it/en

Hall: 10 • Booth: C 30

Mozzarella di Bufala Campana PDO

Product description
The best known and the highest selling Italian pasta filata PDO fresh cheese all over the world. Made according to the rules and specifications of Consorzio di Tutela per la Mozzarella di Bufala Campana PDO.
Shelf life
30 days.
Packaging details
Brik 200 g. Available in different packaging.
International certifications
Brc, Ifs, Iso 9001:2015; Iso 22000.

CONSORZIO LATTERIE VIRGILIO
www.consorzio-virgilio.it

Pavilion: 10 • Stand: B28 - C27

Burro Virgilio Linea Gourmet

Product description
Butter produced and packaged according to the tradition of Virgilio, with creams coming from associated cheese factories. Quality and workability make it particularly suitable for gourmet food products. Made with milk creams of Italian origin.
Packaging details
5 Kg.
Shelf life
90 days.

CASEIFICIO DEFENDI
www.formaggidefendi.com

Hall: 10 • Booth: D10 - E9

Baffalo Blu with buffalo milk

Product description
A cheese specialty with a unique taste, elected 6Th Best Cheese in the World at the World Cheese Awards 2018. A soft blue cheese made from 100% Italian buffalo milk. Characterized by a compact texture with a light cream colour and blue veins. The long ageing process gives to this cheese an unmistakable, intense and distinct flavor, strongly aromatic.
Shelf life
90 days from packaging date.
Packaging details
1,5 - 3 - 6 kg packed in aluminium.
International certifications
Brc, Ifs, Fda, qualified to export to China.

follow

DELIZIA
www.prodottideliziosa.it

Hall: 10
Booth: A02 - A08 - B01 - B07

Mozzarella

Product description
This outstanding stretched-curd cheese is made from Apulian cows' milk which is daily collected and carefully checked in order to guarantee its most authentic goodness. The quality of the raw material, the respect for traditions, and the pleasant freshness allow to discover, bite after bite, the original flavor of real Apulian mozzarella.
Shelf life
14 days.
Packaging details
200 g (4x50 g).
International certifications
Brc issue 7, Ifs issue 6, Organic.

CASEIFICIO IL FIORINO
www.caseificioilfiorino.it

Hall: 10 • Booth: F30 - F32

Pecorino with Truffle

Product description
Cheese flavored with selected 'scorzone' and 'bianchetto' truffle, finely chopped in small flakes. The flavoring is delicate and not invasive. The cheese is delicate and well balance, with soft but firm consistency, made with Maremma sheeps' milk. It is left to mature in cooling rooms for at least 10-15 days.
Shelf life
3 months from dispatch date.
Packaging details
Weight: approx. 1 kg, if required approx. 500 g. Vacuum-packed, heat-shrinkable, fixed weight.

LUIGI GUFFANTI 1876
www.guffantiformaggi.com

Hall: 10 • Booth: E35

Erborinato Sancarlone Caffè in Crosta

Product description
A variation from the new Blue cheese from Novara that bears the name of the saint patron of the town of Arona: the Sancarlone Blue coffee in rind. It is matured in caves for at least 90 days after being covered with coffee powder. This blue cheese is obtained by processing cow's milk from the province of Novara. It has an intense flavor, slightly spicy, combined with the unique flavor of coffee.
Shelf life
90 days.
Packaging details
3,8 kg.

CASEIFICIO LONGO
www.caseificiolongo.it

Hall: 10 • Booth: F18 - G19

Tomino del Boscaiolo Bio

Product description
Soft cheese with edible and slightly mouldy rind. The original cooking tomino, the Tomino del Boscaiolo, now also organic.
Shelf life
37 days.
Packaging details
180 g (2 x 90 g each tomino) into wooden tray and flow-pack.
International certifications
Brc, Ifs.

SPINOSA
www.spinosaspa.com

Hall: 10P • Booth: F01 - F05

Spinosa Smoked Buffalo Mozzarella

Product description
Smoked spun pasta filata cheese with certified beech shavings. 100% Italian buffalo's milk, naturally smoked.
Shelf life
21 days from production.
Packaging details
Pot 125 g.
International certifications
Brc, Ifs.

IGOR
www.igorgorgonzola.com

Hall: 10
Booth: B30 - 38 / C29 - 37

Gran Riserva Leonardi al cucchiaio

Product description
Gran Riserva Leonardi is a selected Premium Gorgonzola, that originates from the passion and enthusiasm of three generations of cheese makers. It is a sweet Gorgonzola, with an exclusive flavour.
Shelf life
59 days.
Packaging details
Wheel (12 kg), 1/2 wheel (6 kg), 1/8 wheel (1,5 kg) 1/16 wheel (750 g), pack (150/200 g).
International certifications
Iso 9001, Brc, Ifc.

CASEIFICIO SOCIALE MANCIANO
www.caseificiomanciano.it

Hall: 10 • Booth: D40 - D42

Pecorino Toscano PDO Petti Rosso di Manciano

Product description
Soft paste PDO sheep-milk cheese. The minimum ageing period is 20 days. The characteristic of this Pdo Tuscan pecorino - beside the treatment with double concentrate Tuscan tomato paste and Tuscan PGI extra virgin olive oil - is to have a compact, white-colored paste.
Shelf life
210 days.
Packaging details
Whole wheel, about 2,4 Kg.
International certifications
Brc, Ifs.

CASEIFICIO PALAZZO
www.caseificiopalazzo.com

Hall: 10 • Booth: E 10 - F 11

Frozen Burrata

Product description
Kneaded cheese. Frozen product. Burrata is a 'pasta filata' (spunt paste) cheese, filled with a mixture of Uht cream and ribbons of mozzarella.
Shelf life
12 months stored at -18°C.
Packaging details
Frozen Burrata 120 g is packed in a red pp cup branded Conquista. Total weight 180 g.
International certifications
Brc, Ifs, Halal.

BOTALLA
www.botallaformaggi.com

Hall: 6 • Booth: E01 - F06

Don Curry formaggio al curry

Product description
The cheese is made with 100% Piedmont milk and characterized by the presence of curry.
Packaging details
Around 650 g.
Shelf life
65 days from packaging date.

follow

A PRECIOUS ALLY IN THE KITCHEN!

Sterilgarda long life Ricotta cheese is excellent tasted alone but it can be easily used in the kitchen in a thousand ways, from quiches to desserts. A great ally for delicious recipes!

50° ANNIVERSARIO 1969 · 2019

sterilgarda alimenti

WWW.STERILGARDA.IT

MOLINO PASINI
www.molinopasini.com

Hall: 7 • Booth: B12 - B16

Primitiva Organic flours

Product description
Three new products enrich the Primitiva flours line: a type 1, type 2 and whole-meal flour all organic certified. To combine all the flavours and aroma of a flour rich in fibres and responding to all organic standards.
Shelf life
6 months.
Packaging details
10 kg bags.
International certifications
Ccpb for organic products, Brc, Ifs, Haccp.

PEDON
www.pedon.it

Hall: 5 • Booth: E22 - F23

I Pronti

Product description
Ready-to-eat grains and pulses, steamed without preservatives. A range of 12 items in 3 lines for any taste and occasion: Grains, Pulses and Mix of grains and pulses. A family of versatile and innovative products with a genuine taste to be served either hot or cold. They can be used for many different and creative recipes.
Packaging details
250 g.
Shelf life
18 months.

CERRETO
www.cerretobio.com

Hall: 3 • Booth: H21 - H23

5 Minutes Meal

Product description
A new line of healthy meals, tasty and 100% organic, microwaveable and ready-to-cook. Main courses easy to make, perfect for the office or for a quick meal while studying (the product must be rehydrated).
Shelf life
15 months.
Packaging details
100 g, packed in transparent polypropylene bags with self-adhesive label.
International certifications
Icea, Brc Food, Ifs Food.

MOLINO DALLAGIOVANNA G.R.V.
www.dallagiovanna.it

Hall: 3 • Booth: H5 - K10

LeDivine

Product description
From a selection of the best Italian wheat, washed and slowly cold-milled, comes 'leDivine': Sofia, Monica and Anna, a multipurpose Italian flour line, ideal for all professional needs, inspired by women.
Shelf life
1 year.
Packaging details
5 - 25 kg.
International certifications
Iso 9001; Iso22000; Halal, Kosher, Ifs, Brc, Organic.

MOLINO DE VITA
www.molinidevita.it

Hall: 5 • Booth: D26

Organic whole-meal Semolina High Fibers

Product description
Obtained through a 'whole' grinding of the wheat, with a low rate of refining and sieving and high technological value. It has a minimum fiber content of 8% and contains 95% of the germ, a high content in vitamins, mineral substances, antioxidant compounds, proteins with high biological value, and stability.
Shelf life
6 or 12 months.
Packaging details
Bulk truck, 25 kg bags, 800 kg big bags.
International certifications
Organic certifications Cee 834/07, Ifs Food Certificate, Uni En Iso 9001, Uni En Iso 22005, Supply chain dedicated Apulian products.

MOLINO RACHELLO
www.molinorachello.it/en

Hall: 5 • Booth: M22 - N23

7G - Sette G

Product description
Sette G seven-grain flour from Molino Rachello arose from the combination of soft wheat, organic durum wheat Senatore Cappelli, organic Tritordeum, spelt and whole-wheat spelt, oat, rye and rice flours, without added seeds. Seven grains with extraordinary nutritional value, enhanced by the intense note of wheat germ. Also available in a 100% organic version, this versatile mix is great for aromatic pasta and pizza easy to digest.
Shelf life
6 months (750 g and 5 kg), 12 months (25 kg).
Packaging details
750 g, 5 kg (plastic bags packaged in a protective atmosphere), 25 kg (paper bags).
International certifications
Organic, Iso 9001.

MOLINO ROSSETTO
www.molinorossetto.com

Hall: 5 • Booth: E02 - E06

Whole-wheat Flour 100% Italian Wheat

Product description
A whole-wheat flour, of 100% Italian wheat, ideal for rustic bread, pizza and flat bread. The brik, made with Fsc paper, makes it possible to use the flour efficiently and cleanly. It is also resistant, easy to place in the sideboard and easy to close. The CR top flour line is made of whole-wheat flour 100% Italian wheat, wheat flour type "00" 100% Italian wheat, soft wheat flour type "00" and soft wheat flour type "0" manitoba.
Shelf life
13 months.
Packaging details
Brik with cap closure (750 g).
International certifications
Iso 9001, Fsc packaging, Organic, Kamut license, suitable for people with coeliac disease, Ifs Food, Vegan Ok, Fda.

MARTINOROSSI
www.martinorossispa.com

Hall: 3 • Booth: K22 - K24

Artisan: flours, grains, polenta

Product description
High quality, complete traceability and pure innovation, produced by a controlled Italian chain and all allergen free: this is Artisan line, dedicated to professionals, laboratories and the Horeca channel. It includes three products: legume flours, pre-cooked with an innovative pressure cooking system, naturally gluten-free, rich in protein and fiber, ideal for the production of fresh pasta, velvety and bread; whole grains, directly from the MartinoRossi supply chain, controlled from seed's selection; polenta, thanks to the control of the varieties and to the particular precooking 'as it once was', maintains color, granulometry and brilliance.
Shelf life
12 months.
Packaging details
1 kg and 20 kg bags, recyclable.
International certifications
Csqa, Brc, Bios, Valid It, Kosher.

CONDORELLI INDUSTRIA DOLCIARIA BELPASSO
www.condorelli.it

Hall: 4 • Booth: D12 - E13

Almond Drink 'Condorelli'

Product description
Almond Drink is a natural e refreshing vegetable drink.
Shelf life
24 months.
Packaging details
Tetrabrik of 200 or 1000 ml.
International certifications
Ifs, Brc.

THE BRIDGE
www.thebridgebio.com

Hall: 10 • Booth: E18 - E20

Bio Protein Drink

Product description
The first protein drink that represents an alternative to soy, 100% organic. Its simple recipe includes spring water, chickpeas (12%) and sea salt. There are no added sugars, it is gluten and cholesterol free.
Shelf life
12 months.
Packaging details
Tetrapak 1 lt.
International certifications
Icea, Jas, Ibd, Nop.

follow

ANIMAL PROTEINS

SALUMIFICIO FRATELLI BERETTA
www.fratelliberetta.com

Hall: 6 • Booth: E09

Paciocotti Beretta

Product description
Beretta's tender hamburgers made with cooked ham are the ideal solution for a tasty and highly nutritious dish.
Shelf life
23 days on shelf.
Packaging details
150 g atmosphere packaged.

SALUMIFICIO BORDONI
www.bresaolabordoni.it

Hall 6 • Booth C31 - D36

Bresaola Bordoni Magnifica

Product description
To produce Magnifica Bordoni only the fresh topside of the prestigious Limousine, Charolaise and Garronese breeds are used. From these breeds Bordoni obtains a bresaola with a significant weight - about 6 kg for the whole product, 3 kg for the half piece (calibre 150) - and with a much lighter color than bresaola made with Brazilian meats.
Packaging details
Carton 1 piece - 5,6 kg each. Carton 2 pieces half cut - 2,8 kg each.
International certifications
Ifs, Brc (for the production site).
Shelf life
90 days.

BORTOLOTTI SALUMI
www.salumibortolotti.it

Hall: 6P • Booth: F23 - G28

Cold cuts line #panino

Product description
An innovative street food style pack, with a modern naming, for a young, captivating, and Italian pre-sliced product line. The target is the modern consumer looking for the right quality, at the right price, in the right size.
Shelf life
60 days from the packaging date for seasoned products; 40 days for cooked products.
Packaging details
50, 60, 70 g depending on the product. Packed in plastic tray.
International certifications
Ifs, Brc.

CENTRO CARNI COMPANY
www.centrocarnicompany.com

Hall: 6 • Booth: B27 - C28

You&Meat

Product description
150 g frozen burgers; each display consists of 12 burgers individually packaged in flow packs. They are available in bovine, Chianina PGI and Aberdeen angus versions.
Shelf life
18 months from production.
Packaging details
Flow pack (pet mat) for a single burger.

HANDL TYROL - CHRISTANELL
www.handltyrol.com

Hall: 6P • Booth: G09 - H12

Tyrolean Beef Chips

Product description
Made of high quality lean beef, with low fat content and 80% of energy provided by protein. The new Handl Tyrol Tyrolean Beef Chips are the perfect snack for all fitness-enthusiasts and diet-conscious snack fans.
Shelf life
150 days at room temperature.
Packaging details
30 g, thermo-formed snack pack.

SALUMIFICIO FALCONE
www.salumificiofalcone.it

Hall: 3 area green • Booth: L25

'Nduja suinonero bio

Product description
This spicy pork spread named 'nduja is gaining popularity around the world. The meat comes from the grass-fed black pigs of Sila national park, where they drink spring water and eat organic cereals grown in the high plains. Antonio and Giuseppe Falcone personally grind, knead, stuff and tie, and they teach the traditional manner of Sila pioneers to a small group of employees, including some refugees. Gluten free, 100% Italian.
Shelf life
180 days.
Packaging details
Vacuum 180 g.
International certifications
Organic Certification Ccpb.

IBIS – ITALIA ALIMENTARI
www.ibis-salumi.com

Hall: 6 • Booth: E21

Piccoli e Buoni Ibis

Product description
4 sliced cured meats, ideal as snacks, antibiotics free, with only preservatives of vegetable origin. The range includes: Prosciutto Crudo, Cooked ham, Salame Milano, Mortadella.
Shelf life
Prosciutto Crudo 45 days, Mini Cotto 35 days, Salame Milano 45 days, Mortadella 35 days.
International certifications
Ifs Higher level, Brc AA, Bio organic, Aicl, Halal Italia, Uni En Iso 22000:2005, Uni En Iso 22005:2008, Cfia approved, US export certification, Gfsi certification (in progress). Abilitations for: Japan, Corea, Hong Kong, Brazil, Russia, Canada, Usa.

PROSCIUTTIFICIO MONTEVECCHIO
www.prosciuttificiomontevecchio.it

Hall: 6 • Booth: G19 - G21 - G23

Lonzardo

Product description
From selected Italian pigs, the intense taste of lonza and the aroma of its natural lard.
Shelf life
Under vacuum 180 days. Natural 360 days.
Packaging details
5 Kg whole. Natural, black peppered, chili peppered, pink pepper. Available also in halves under vacuum.
International certifications
Brc, Ifs, export authorization Canada, Japan, Hong Kong, Singapore, Brazil.

CONSORZIO DEL PROSCIUTTO TOSCANO
www.prosciuttotoscano.com

Hall: 6 • Booth: G02 - G06

Prosciutto Toscano PDO

Product description
For the production of Prosciutto Toscano only the meat of the heavy Italian pigs with low water content, optimal fat content, and good tastiness is used. Animals are raised in Tuscany and other designated regions in Italy.
Packaging details
You can find the prosciutto with bone, boneless, cuts or sliced (prepacked). A metal seal with the initials P.T. (Prosciutto Toscano) and the month and year saying when maturing has begun is attached to each ham.

RASPINI
www.raspinisalumi.it

Hall: 6 • Booth: B15 - C18

High Quality Cooked Ham Grancordato

Product description
The High Quality Cooked Ham Grancordato arises from the exclusive selection of fine pork meats, coming from Italian farms. Meat is manually handled by skilled artisans, who extract the bone without cutting the pig's thighs, preserving thus its anatomic features.
Shelf life
90 days.
Packaging details
Weight: 12 kg. Pack type: vacuum-packed.
International certifications
Brc, Ifs.

I SALUMIERI DI CASTEL CASTAGNA
www.isalumieri.it

Hall 6 • Booth F07 - G08

Passite del Gran Sasso

Product description
Aged pork sausages. Weight 65-70 g.
Packaging details
Vacuum pack of 4 pieces (200-250 g) or in tray under modified atmosphere (2,5 kg).
Shelf life
6 months since production date.
International certifications
Brc, Ifs.

PARMA IS
www.parmais.it

Hall: 6 • Booth: H25 - L28

Pagnotto - Salmon and avocado

Product description
Il Pagnotto, incredibly fresh, packed in modified atmosphere, renews itself with a new fresh filling: salmon, avocado, turmeric bread. 'Il Norvegese' was born to satisfy modern consumers always seeking for healthier food. Salmon's organoleptic properties, turmeric's health content and avocado's vitamins are a great combination.
Shelf life
21 days.

follow

ALCE NERO
www.alcenero.com

Hall: 7 • Booth: E15 - F20

Whole durum wheat pasta with legumes

Product description
The Alce Nero line of whole (durum) wheat pasta with legumes is a good alternative to traditional pasta. It includes four items: Whole wheat penne and spaghetti with red lentils; Whole wheat fusilli and linguine with chickpeas. The Alce Nero whole wheat pasta with legumes is 100% organic and 100% Italian. Rich in proteins and fibers, it is bronze died and holds up excellently to cooking. It is a valid alternative to traditional pasta thanks to its higher protein content and lower carbohydrate content.
Packaging details
500 g x 12.
Shelf life
36 months.

ANDRIANI
www.andrianispa.com

Hall: 5 • Booth: P22 - R25

Felicia Verdipiù – Organic yellow lentil and pumpkin sedani rigati

Product Description
Felicia Verdipiù is an original recipe that revolutionises the concept of pasta and transforms it in a complete meal. Organic, vegan and gluten-free pulses and vegetables, with 100% natural ingredients. An absolute novelty, Felicia Verdipiù is good, easy to prepare, nutritious and rich in proteins and potassium. With the full flavour of fresh vegetables, it's good as it is, even with just Extra Virgin Olive Oil and Parmesan cheese.
Packaging details
200 g.
Shelf life
24 months.

RISO ACQUA E SOLE
www.risoacquaesole.it

Hall: 5 • Booth: U04

Riso Carnaroli classico

Product description
It is no coincidence that Carnaroli is called 'the king of risottos'. Thanks to its high starch content, firmer consistency and longer grains, it keeps cooking superlatively.
Shelf life
2 years.
Packaging details
500 g, 1 kg.
International certifications
Iso 9001, Kosher.

ANTICO PASTIFICIO UMBRO
www.anticopastificioumbro.it

Hall: 05 • Booth: F11 - F15

Pici

Product description
Italian durum wheat semolina pasta, bronze drawn, typical format of the Tuscan tradition.
Shelf life
36 months.
Packaging details
500 g, heat-welded plastic sachets.
International certifications
Brc, Ifs.

CASCINA BELVEDERE
www.cascinabelvedere.com

Hall: 5 • Booth: B10

Whole grain biodynamic

Product description
Functional food that maintains all plant properties and generates a structured grain, natural source of fiber.
Shelf life
24 months.
Packaging details
500 g vacuum.
International certifications
Ifs, Brc.

DALLA COSTA ALIMENTARE
www.dallacostalimentare.com

Hall: 7 • Booth: D21 - D25

Baby Food

Product description
Kids shapes for babies from 10 months: available under the Disney brand and Dalla Costa brand also flavored with tomato and spinach.
Shelf life
36 months.
Packaging details
400 g of pastina 'farfalline' with alimentary box; 200 g of pasta packed with clear film and paper label.
International certifications
Ifs, Brc, Bio Baby Food, Vegan.

GR.A.M.M. - GRUPPO MILO
www.casamilo.it

Hall: 7 • Booth: K05 - L10

Casa Milo dry pasta 'Orecchiette'

Product description
Dry pasta 'Orecchiette 500 g' is produced exclusively with the best Apulian wheat, purchased at a fair price to safeguard local farmers and milled according to ancient tradition. This way the company can offer an excellent, sustainable and certified product from field to table that holds all the taste and naturalness of a unique land.
Shelf life
730 days.
Packaging details
500 g bag.
International certifications
Kosher, Halal, Iso 9001, Iso 14001.

PASTIFICIO ATTILIO MASTROMAURO GRANORO
www.granoro.it

Hall: 5P • Booth: F12 – G13

Penne Rigate 'Granoro Dedicato'

Product description
Penne Rigate 'Granoro Dedicato' with double rifling and bronze extrusion has a wavy profile that guarantees uniform cooking in all its parts, enhancing the taste of the dish thanks to an ideal degree of roughness. Its larger diameter than the classic Penne Rigate allows it to collect even more full-bodied seasonings, retaining characteristics such as elasticity and consistency. Excellent yield even with double cooking.
Shelf life
36 months from date of packaging.
Packaging details
500 g, cellophane.
International certifications
Dedicato is the first pasta from the Apulian cereal supply chain certified Uni En Iso 22005 and to have obtained from the Apulia Region the concession of the collective brand 'Puglia Quality Products' which recognizes its authenticity.

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GRAN MORAVIA

The ECO-SUSTAINABLE CHAIN

FLAIR

Brazzale

LUCIANA MOSCONI
www.lucianamosconi.it

Hall: 7 • Booth: C21 - D24

La pasta fresca - Cappelletti with meat filling

Product description
Cappelletti with meat filling made with 100% Italian grade A fresh eggs, 100% Italian first-extraction durum wheat semolina. The dough is rough and hard but at the same time elastic, in line with the 'Luciana Mosconi method'. The filling is made exclusively with high-quality beef selected from Italian farms, pork from the Marche region, Parmigiano Reggiano matured for 22/24 months without the addition of glutamate, breadcrumbs, artificial flavorings and preservatives.
Packaging details
250 g.
Shelf life
55-60 days.

MARABOTTO GIACOMO & FIGLI
www.marabotto.com

Hall: 7 • Booth: C22 - 24

Multicolored Papillon

Product description
Multi-flavored durum wheat pasta.
Shelf life
36 months.
Packaging details
500 - 1000 g.
International certifications
Haccp.

MASTER
www.gnocchimaster.com

Hall: 7 • Booth: C01 - D04

Fresh potato gnocchi with turmeric and ginger

Product description
Gnocchi made with fresh potato steamed, with turmeric and ginger.
Shelf life
60 days.
Packaging details
400 g.
International certifications
Ifs, Brc, Iso 22000, Icea, Fda.

MY COOKING BOX
www.mycookingbox.it

Hall: 1 • Booth: G10

Sicilian dinner: Cannellini beans with anchovies in spicy sauce and Spaghetti pasta with anchovies

Product description
A very easy to prepare gourmet dinner, exclusively realized by My Cooking Box in cooperation with Rizzoli Emanuelli and studied together with the famous chef Fabio Potenzano. This special box contains two traditional recipes for deeply experiencing all the flavours of Sicilian cuisine: a cannellini beans cream combined with Rizzoli anchovies in spicy sauce and flavoured breadcrumbs as a starter and Spaghetti pasta with anchovies, pine nuts, raisins and tomato sauce garnished with breadcrumbs.
Shelf life
Long-life product.
Packaging details
Net weight 766,50 g/ 27,04 oz.

PASTIFICIO DEI CAMPI
www.pastificiodeicampi.it

Hall: 5 • Booth: G12 - H13

N° 96 zitone lungo - Bronze die

Product description
The product is made with high quality raw material, Italian durum wheat semolina, extruded through a bronze die and slow dried, PGI certified.
Shelf life
24 months.
Packaging details
Primary packaging: cellophane (pp). Net weight: 1000 g.

PRINCIPATO DI LUCEDIO
www.principatodilucedio.it

Hall: 7 • Booth: F09

Carnaroli rice

Product description
Carnaroli is the most prestigious Italian rice variety. Its grain is big and compact and it has excellent cooking resistance. It is used by the best international chef in the preparation of traditional Italian risottos; it is the perfect rice variety for connoisseurs.
Shelf life
18-21 months from the production date.
Packaging details
500 g, 1 kg, 5 kg. Packaged in protective atmosphere.
International certifications
Kosher.

RISERIA VIGNOLA GIOVANNI
www.risovignola.it

Hall: 5 • Booth: E18 - F19

Riso Vignola Biologico (Organic)

Product description
Organic Arborio rice grown in Italy with mulching seeding system.
Shelf life
24 months.
Packaging details
Paper Zip Lock Pack - 26.5 oz (750 g).
International certifications
Organic, Usda Organic, Biosuisse Organic, Ibd, Demeter, Fairtrade, Kosher, Ifs, Brc, Stp Gluten Free, Igp riz de Camargue.

ARMONIE ALIMENTARI
www.armoniealimentari.it

Hall: 10 • Booth: F10 - F12

Parmonie, chips with chickpeas and Parmigiano Reggiano

Product description
Parmonie is a crispy and healthy snack made with chickpeas and Parmigiano Reggiano (no other flour added). Oven baked.
Shelf life
270 days.
Packaging details
Flow bag (23 g) and trays (75 g).
International certifications
Ifs, Brc.

FIORE DI PUGLIA
www.fioredipuglia.com

Hall: 3 • Booth: F11 - F13

Organic Taralli 'Qualità Puglia' certified

Product description
Organic Taralli 'Qualità Puglia' certified are boiled according to tradition with mother yeast and 'km zero' raw materials from organic farming. These taralli are a vegan food product.
Shelf life
240 days.
Packaging details
300 gr. Recyclable packaging.
International certifications:
Brc, Ifs.

GRAN BON
www.granbon.it

Hall: 7 • Booth: T19 - U20 (Morato's Booth)

Granbon Crostini with wholemeal

Product description
Granbon croutons are an excellent alternative to fresh bread. Always fragrant, they are also great for preparing tasty appetizers. Ideal to taste alone or stuffed. They are also available with Olive Oil and Spelt.
Shelf life
300 days from production date.
Packaging details
200 g.
International certifications
Brc, Ifc.

ITALPIZZA
www.italpizza.it

Hall: 2 • Booth: B20 - C21

26X38 sausage and potatoes

Product description
The novelty at Italpizza is the new sausage and potato taste, part of the iconic 26x38 range. The new product is inspired by a timeless combination, part of the Italian culinary tradition, which enriches the pizza making it extremely tasty. The dough is soft and fragrant and is stuffed only with selected high quality ingredients such as soft wheat flour, extra virgin olive oil, tomato sauce, mozzarella, pork sausage and potatoes seasoned with rosemary. To enjoy the pizza at its best, simply preheat the oven to 220°C and cook it for 5-7 minutes until the cheese has melted.

Shelf life
12 months.
Packaging details
560 g.

follow

LA MOLE - F.LLI MILAN
www.la-mole.com

Hall: 7 • Booth: K 21 - L 24

Mini Sfornatini

Product description
Let's rediscover the original fragrance of the traditional breadstick, but in a new snack version: the Mini Sfornatini La Mole. A new line of small and fragrant breadstick with a homemade flavor. Perfect for every moment of the day. Flavors: Classic, Rosemary, Tomato & Basil, Sesame, Various seeds.
Shelf life
12 months.
Packaging details
100 g.
International certifications
Brc, Ifs, Kosher.

PASTIFICIO DI BARI TARALL'ORO
www.taralloro.it

Hall: 7P • Booth: T16 - T20

Tarallini Red Beet, Turmeric and Ginger, Spinach, Chia Seeds

Product description
A typical organic product from Apulia made with 100% organic soft wheat flour, which guarantees a unique and exceptional taste. The use of natural organic ingredients like red beet, spinach, Chia seeds, turmeric and ginger, carefully selected, gives a bright color to the product and makes it inviting. Without sulfites, without yeasts, without palm oil. They are steam boiled for greater friability and quality.
Shelf life
12 months.
Packaging details
250 g. Heat-sealed bag in paper box with window.
International certifications
Ifs, Bcr, Iso 14001:2004, Ou Kosher, Nop/Bio.

TERRE DI PUGLIA
www.terredipuglia.it

Hall: 7 • Booth: K17 - L20

Organic Taralli with Chia Seeds

Product description
Terre di Puglia Organic Taralli with Chia Seeds, made only of extra virgin olive oil, meet the growing need of many consumers to choose healthy snacks, with few calories and nutritional benefits. Chia Seeds, in fact, are rich in calcium, vitamin C and omega3. Terre di Puglia grants sustainable and certified quality standards to offer not only genuine snacks but also tasty and able to conquering the most demanding palates.
Packaging details
200 g bag.
Shelf life
12 months.
International certifications
Bio Icea.

PUGLIA SAPORI
www.pugliasapori.com

Hall: 7 • Booth: A17 - A19

Organic Tarallini 200 g

Product description
For these new organic tarallini Puglia Sapori has designed a paper-touch packaging with neutral tones on which stand out the colorful labels that identify each reference: extra virgin olive oil, multigrain, kamut, spelt and durum wheat Cappelli. The packaging evokes the authenticity that has always distinguished the company's organic products.
Shelf life
12 months.
Packaging details
200 g, 10 pieces per case, paper-touch bag.
International certifications
Brc, Ifs, Bioagricert certification for organic products.

TENTAZIONI PUGLIESI
www.tentazionipugliesi.it

Hall: 10 • Booth: E09 - E11 - D10 - D12

Aequasalis - Mesquette

Product description
Aequasalis - Mesquette are organic taralli produced with microbiologically pure sea water and without the addition of kitchen salt. They are made with soft wheat flour and organic extra virgin olive oil, flavored only with microbiologically purified sea water that guarantees a high intake of mineral salts and gives the product a richer taste and an enveloping flavor.
Shelf life
6 months.
Packaging details
150 g in transparent plastic bag enveloped in a paper box.
International certifications
Brc, Ifs, Organic.

RISO GALLO
www.risogallo.it

Hall: 5 • Booth: T21 - T23

Riso Gallo Snack Red Rice and Lentils

Product description
Riso Gallo, one of the oldest rice-growing companies in Italy, has expanded its product range with the new triangle snacks 'Buoni&Free': three different recipes of innovative, healthy, tasty and gluten free snacks.
Shelf life
12 months.
Packaging details
80 g pack.

LA PIZZA+1
www.lapizzapiuuno.it

Hall: 10 • Booth: F017 - F019

La Pinsa

Product description
The new Pinsa is made with a unique dough and is different from any other kind of pizza. Made without preservatives and completely hand stretched, it is the result of a long leavening based on mother yeast use and then stone-baked. Pinsa is smooth and tasty, with a handcrafted appearance, even with no filling.
Shelf life
30 days.
Packaging details
260 g flowpack.

MORATO PANE
www.moratopane.com

Hall: 7 • Booth: T19 - U20

Bread chips and sticks

Product description
The Chips and the Sticks of Bread are thin loaves of bread and sticks baked in the oven, offered in different flavors: classic, salt and pepper, bbq, chili.
Shelf life
300 days chips, 201 days sticks.
Packaging details
85 g chips, 100 g sticks.
International certifications
Brc, Ifs.

VALLEDORO
www.valledorospa.it

Hall: 7 • Booth: K18 - K20

Risibisi Ceci BIO

Product description
This chickpea-based nibble is a new crunchy organic snack from Valledoro. They are baked in the oven and not fried, and are free from palm oil. A rich source of protein and fibre, and ideal as a snack or as an accompaniment to vegan dishes.
Shelf life
8 months.
Packaging details
80 g.
International certifications
Bio.

follow

ADI APICOLTURA
www.adiapicoltura.it

Hall: 4 • Booth: E26

Biodiversità - acacia honey

Product description
100% organic honey.
Shelf life
24 months.
Packaging details
Glass jar 250 g.
International certifications
BioAgriCert, Usda Organic and Canada Organic, Brc, Ifs.

ANTICA TORRONERIA PIEMONTESE
www.torrone.it

Hall: 4 • Booth: D10 - E09

Panna cotta sweet truffles and cranberry & pink chocolate sweet truffles

Product description
The company's two new sweet truffle flavors for 2019: one more traditional, linked to the famous Piedmont dessert 'panna cotta'; and the other more modern, with the combination of ruby chocolate and cranberry to give a different range of sensorial feeling, a little bit more acid, but powerfully fresh.
Shelf life
12 months.
Packaging details
Box 140 g and 55 g, bag 200 g, bulk 3000 g.
International certifications
Brc, Ifs.

BENEBIO
www.benebio.it

Hall: 3 • Booth: F21 - F25

Organic shortbread with oat flakes and with wholemeal spelt

Product description
BeneBio offers two organic, vegan shortbread, palm oil free and rich in fiber. The better way to to start the day.
Packaging details
350 g/12,3 oz bag.
International certifications
Organic.

BORSARI VERONA (INDUSTRIA DOLCIARIA BORSARI)
www.borsariverona.it

Hall: 3 • Booth: E12-E20 F11-F19

Cuor di Pandoro Amarena Fabbri

Shelf life
240 days.
Packaging details
1000 g.
International certifications
Brc, Sa8000, Ogm Free.

PASTIFICIO ATTILIO MASTROMAURO - GRANORO
www.granoro.it

Hall: 5P • Booth: F12 - G13

Saracì Cookies

Product description
Shortbread biscuit with buckwheat and chocolate drops.
Shelf life
12 months from the date of production (as without palm oil).
Packaging details
350 g packs consisting of two coupled materials, the outer layer of paper and the inner layer of aluminum for food.

EDO
www.edogelati.eu/en/

Hall: 2 • Booth: E12 - E14

Rice on stick

Product description
The company presents a 100% vegan ice cream, free from lactose and gluten. Made with non-GMO Italian Rice. Edo's range includes more than 150 SKUs and 30 formats in a variety of styles and sizes. The company is mainly focused on the continuous research and on the rapid development of novelties, in particular on prêt-à-manger formats.
Shelf life
24 months.
Packaging details
40 g stick.
International certifications
IFS, Organic products certification.

DI LEO PIETRO
www.dileo.it

Hall: 4 • Booth: H16 - K19

Lune Nuove with whole wheat flour, chocolate chips and buckwheat flour

Product description
Biscuits made by using the technique of wire cutting with bronze which makes the biscuit more porous and rougher, perfect to be soaked into milk without breaking. The Lune Nuove with whole wheat flour, chocolate chips and buckwheat flour represent the perfect combination between healthy nutrition and taste, because made with chocolate and 100% whole wheat flour. Buckwheat is perceived as a 'modern' ingredient, appealing for both consumers and professionals.
Shelf life
365 days.
Packaging details
600 g bag.
International certifications
Iso 22000, Iso 14001, Brc Global Safety, Ifs for food safety.

CONAPI SOC. COOP. AGRICOLA - MIELIZIA
www.conapi.it

Hall: 4P • Booth: A06 - A10

Organic Mielizia Bio Fiordilatte Ice Cream

Product description
Organic Mielizia Bio Fiordilatte Ice Cream is sweetened only with the organic Acacia honey of the company's beekeeper members. It is made with only 3 selected ingredients (fresh milk, honey and cream), 100% Italian, without additives, colorings, preservatives and thickeners. It is also gluten-free. Also available in hazelnut (sweetened only with Sulla honey) and cocoa (sweetened only with Acacia honey).
Shelf life
12 months.
Packaging details
270 g.
International certifications
Emas registration, Check Fruit, Kiwa, Ccpb, Eurobio, Cribis.

BULGARI AGOSTINO
www.bulgariagostino.it

Hall: 4 • Booth: K08 - K10

Marshmallow butterflies

Product description
Marshmallow candies in butterfly shape, blue and pink colours.
Shelf life
18 months.
Packaging details
900 g bags x 6 in a carton. Other kind of packaging available on request.
International certifications
Iso 9001:2015, Ifs, Brc.

CALLIPO GELATERIA
www.gelateriacallipo.com

Hall: 7P • Booth: H01 H09 - K02 K10

Crema Pregiata Walnut with dried figs from Calabria

Product description
Walnut flavor ice cream with cubes of aromatized dried figs. A sophisticated and particular combination, strongly inspired by the territory, which makes this product one of the most appreciated by consumers.
Shelf life
36 months.
Packaging details
310 g. Tub with cover of CA and tamper-evident.

CASA DEL DOLCE
www.casadeldolce.it

Hall: 4 • Booth: L18 - M19

Trinketto Peach

Product description
Soft drink peach flavor.
Packaging details
70 ml.
Shelf life
18 months.
International certifications
Brc, Ifs.

FORNO MIOTTI
www.fornomiotti.com

Hall: 4 • Booth: E 31

Tarts slice

Product description
4 slices of tarts (40 g each) available in four flavors: Hazelnut, Blueberry, Apricot, Strawberry.
Shelf life
6 months.
Packaging details
Simple pet tray containing the four portions of tart in various flavors. Weight of each pack 160 g.
International certifications
Ifs, Brc, Certificate of conformity for production from organic farming.

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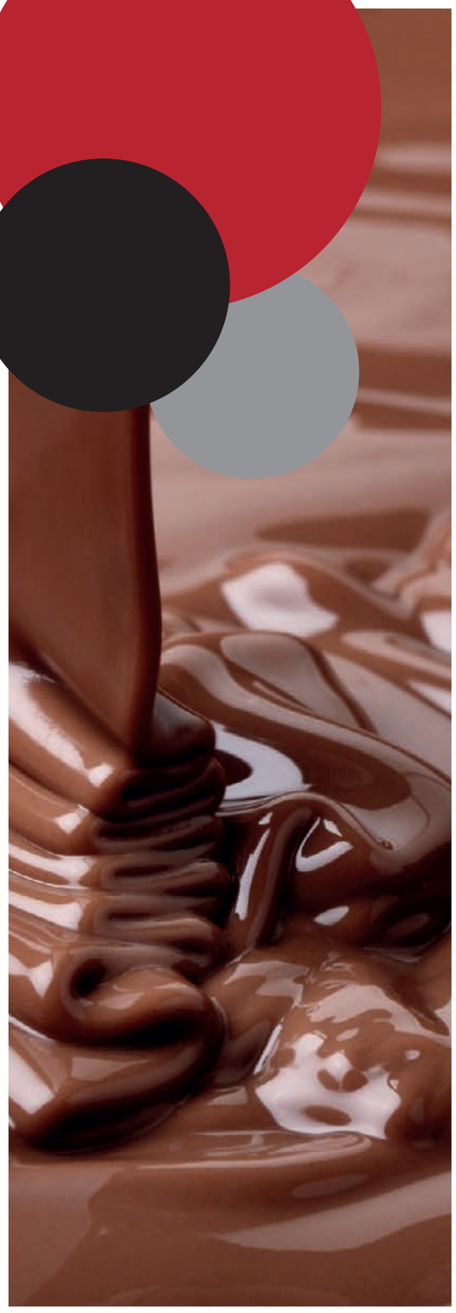
SWEETS & CONFECTIONERY



ICAM - VANINI
www.icamcioccolato.it

Hall: 4 • Booth: F22-G25

Organic Vanini bars with Uganda cocoa

Product description
Delicious Ugandan cocoa with all organic inclusions, identified in the nuts world. The range consists of 6 different chocolate bars: 70% dark chocolate; 34% milk chocolate; Gianduja bar with whole hazelnuts; Milk bar 34% with roasted whole almonds; 56% dark bar with whole hazelnuts and caramel; 56% dark bar with whole salted pistachios. All made with Ugandan cocoa from the Bundibugyo cooperatives, where Icam has built a center of cocoa harvest where the stages of fermentation and drying of cocoa beans are carried out entirely.
Packaging details
100 g bars.

INCAP
www.incap.it

Hall: 4 • Booth: C05 - C09

Gocce di benessere

Product description
Gocce di benessere is the new 'Cesare Carraro' candy line, which includes five delicious flavors and is made with natural ingredients like honey, herbs, blueberries, propolis and algae. Honey is the main ingredient, which makes these candies good both for the throat and for the overall well-being. They are GMOs and gluten free and have been produced without using artificial colors.
Shelf life
36 months.
Packaging details
Weight: 100 g (18 bags x ct).
International certifications
Halal, Kosher, Haccp.

LA SUISSA
www.lasuissa.it

Hall: 4 • Booth: L07 - L09

Ruby chocolate - CuoreRosa 150 g

Product description
Pink is the fourth category of chocolate after dark, milk and white chocolate. It has no added colorants or flavors: a unique process unlocks the ruby color directly from the ruby cocoa bean. Pink chocolate contains 31% cocoa and has a fruity, intense flavor, with fresh and slightly acid notes. La Suissa has elaborated a new recipe by proposing a filling that combines ruby with the taste of gianduja produced with only Italian hazelnuts, in a unique combination.
Shelf life
15 months.
Packaging details
150 g bag.
International certifications
Ifs, Haccp, Brc.

MAJANI 1796
www.majani.it

Hall: 4 • Booth: H02

Blanco de Cepe chocolate bar

Product description
Extra dark chocolate bar 78% made with the special single-origin 'cocoa sauvage' from Venezuela Blanco de Cepe.
Shelf life
30 months.
Packaging details
75 g, transparent flowpack and carton case.

DOLCIARIA MONARDO
www.dolciariamonardo.com

Hall: 3P
Booth: C01 - C09 - D02 - D10

Gran Pasticceria

Product description
Delicate and shortbread pastries in assorted format.
Shelf life
12 months.
Packaging details
180 g box.

MUCCI GIOVANNI
www.muccigiovanni.it

Hall: 4 • Booth: B16

Princesse Margot

Product description
Since 1894 Mucci has been producing confetti and dragées, using raw materials of the highest quality. The new Dragees, conceptualized by Cristian Mucci, the fourth-generation heir, are characterized by a shape and color that evoke the world of the lingerie/ clothing sector. A unique, aphrodisiac Dragees, created to make the couple's relationship special and sensual even to the taste, thanks to the union of grappa, chilli pepper, dark chocolate and the leopard print.
Packaging details
75 g - 10 confetti.
Shelf life
9 months.
International certifications
Kosher, Halal.

PASTICCERIA QUADRIFOGLIO
www.pasticceriaquadrifoglio.com

Hall: 10 • Booth: H36 - H38

Cake

Product description
Pasticceria Quadrifoglio presents the new chilled cakes (400 g): a perfect dessert to serve and taste directly from the refrigerator. Thanks to the innovative tray, it is possible to extract the dessert and serve it exactly as if it had been made at home. The flavours available are: chocolate cheesecake, strawberry cheesecake, blueberry cheesecake, chocolate mousse, chocolate and hazelnuts and tiramisu.
Shelf life
25 days.
Packaging details
350 - 400 g in plastic tray.
International certifications
Bcr, Ifs, Fda.

IL FORNAIO DEL CASALE
www.gecchele.com

Hall: 4 • Booth: G22 - H25

Pancakes Gecchele

Product description
Traditional pancakes, typical products of the American breakfast.
Shelf life
75 days.
Packaging details
240 g. Packed in 6 multipacks with 2 portions each.

LA PERLA DI TORINO
www.laperladitorino.it/en

Hall: 4 • Booth: G16 - 20

Salted Peanuts Truffle

Product description
The mellow notes of salted peanuts encounter the intense charme of caramel white chocolate in an awakening delicious chocolate truffle.
Shelf life
10-12 months.
Packaging details
14 g ca (200 g clear bag).
International certifications
Brc.

LAMERI
www.lameri.it

Hall: 4 • Booth: F12 - G11 - G13

Organic granola hazelnuts pistachio and white chocolate

Product description
Mix of cereals (puffed, crunchy and flaked), hazelnuts, pistachio and white chocolate with chia seeds and sunflower seeds. This granola is an excellent alternative for your natural and healthy breakfast or for a crunchy snack.
Shelf life
12 months.
Packaging details
400 g bags.
International certifications
Organic.

PAOLO LAZZARONI & FIGLI
www.lazzaroni.it

Hall: 4 • Booth: C08 - D09

Panettone classico metal tin 1 kg

Product description
Classic panettone with sultans and candied fruit branded Augusta Panettoni Milano 1945.
Shelf life
9 months.
Packaging details
1 kg, 6 pieces in the box.
International certifications
Brc.

follow

PASTIGLIE LEONE
www.pastiglieleone.com

Hall: 4 • Booth: N02 - N04

Fabbri sour cherries candy originals

Product description
The unique flavor of Fabbri sour cherries meets the iconic Leone candy originals for a special little pleasure to take everywhere.
Shelf life
None.
Packaging details
30 g carton box.
International certifications
Tuv.

POGGIO DEL FARRO
www.poggiodelfarro.com

Hall: 5 • Booth: S18 - S20

Granola Organic Snack made with sprouted spelt, dry fruits and flax seeds

Product description
Crispy snack with sprouted spelt, cranberries, pecans and flax seeds. A tasty and natural snack, to be munched in the office, at school, in the gym or to add to your favorite yogurt. Ideal also for breakfast to start the day with all the vital energy of nature. Also available: Granola Organic Snack with sprouted spelt, cocoa beans and dried fruit.
Shelf life
8 months.
Packaging details
4 X 80 g single serving pouches in box.
International certifications
Organic certification, Brc.

SARCHIO
www.sarchio.com

Hall: 3 • Booth: E21 - 23

Almond and goji berry bar

Product description
The sweet and intense taste of crunchy whole almonds together with the soft and delicate flavour of goji berries in a snack bar that offers an unusual and surprising combination of Mediterranean and oriental flavours. A truly irresistible snack that is packed with fibre and important nutritious ingredients.
Shelf life
12 months.
Packaging details
20 g single bar.
International certifications
Vegan, organic, gluten free.

TARTUFLANGHE
www.tartuflanghe.com

Hall: 7 • Booth: D11 - D13

Trifulòt pocket boxes

Product description
Small colored Trifulòt boxes: white, black and pistachio.
Packaging details
105 g.
International certifications
Brc, Ifs, Eccellenza Artigiana.

TEDESCO
www.tedescogroup.it

Hall: 4 • Booth: C21 - C25

Piselli iCereali - 9Cereals with plums

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 9Cereali with plums.
Shelf life
12 months.
Packaging details
270 g.
International certifications
Brc, Ifs, Bio, Utz, Fair Trade.

TONITTO 1939
www.tonitto.com

Hall: 2 • Booth: E12 - E14

Lo Stecco

Product description
With the new and easy-handling 'Stecco Sorbetto Tonitto' you can taste Tonitto's Sorbetto wherever you want and without the use of a spoon. Only essential and natural ingredients are used, selected among the best raw materials, with no added flavourings or colourings.
Shelf life
3 years.
Packaging details
60 g x 3 pieces.
International certifications
Brc, Ifs, Utz.

end

JUST AS NATURE INTENDED

OUR CREATIONS HAVE A UNIQUE FLAVOUR, RECOGNISABLE THE WORLD OVER. THEIR INTENSE, CAPTIVATING FRAGRANCE HARKS BACK TO A PURER, SIMPLER TIME, AN ANCIENT TRADITION GROUNDED IN THE USE OF UNADULTERATED INGREDIENTS: CHOICE CUTS, SALT, NATURAL FLAVOURINGS AND AIR – JUST AS NATURE INTENDED.

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WE LOVE OUR CLIENTS AS WE LOVE OUR WORK, AND SO WE CONFORM TO THE HIGHEST STANDARDS FOR QUALITY AND HYGIENE, GUARANTEED BY INTERNATIONAL CERTIFICTION SCHEMES; OUR PRODUCTS SPEAK FOR THEMSELVES – JUST AS NATURE INTENDED.

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HOW TO SAFEGUARD THE ITALIAN PRODUCTION?

ORIGIN LABELLING AND A STOP TO ZERO TARIFFS FROM LDCS ARE TWO OF THE MOST SIGNIFICANT MEASURES INTRODUCED TO SUPPORT THE DOMESTIC MARKET. INTERVIEW WITH ALBERTO FERRARIS, CEO OF ORYZON.

The market is experiencing a critical moment connected with the prices and the new dynamics of the agri-food industry. To support the sector, different solutions have been developed in the past months, starting from the mandatory origin labelling (place of cultivation, processing and packaging), aimed at enhancing Italian products. The European Commission also decided to introduce a safeguard clause on rice imports from developing countries, especially Cambodia and Myanmar. We talked about this complex situation with Alberto Ferraris, ceo of Oryzon Broker Company.

Who is benefiting the most from the safeguard clause?

The processing industry, of course. Since the clause has introduced a duty on milled and semi-milled rice, thus preventing direct competitors of the EU industry from exporting pre-packaged rice to Europe under favorable prices. A decision taken by the EU Commission after visiting major Italian and Spanish processing industries. The effects of the introduction of the clause on the Italian market will not be immediate and will almost exclusively concern the rice of the Indica type or more simply Thaibonnet or Long B. As highlighted by ENR (National Agency for Rice), in the 2017-18 campaign rice imports from third countries (non-EU) fell by 23,733 tonnes, probably as a result of the possible introduction of the clause. In the budget for the 2018-19 campaign, the same imports are expected to increase by 11,954 tons. Starting from September 2017, the price of Indica rice has started to increase, but this fact has no connection with the introduction of the origin labeling nor the clause. In the last two campaigns, the price has been fluctuating between 280 and 320 euros/ton, mainly due to a lower investment in cultivated surfaces. But it doesn't end up here…

What do you mean?

Once again in regard to the safeguard clause, we must not forget that duties are temporarily restored on imports of Indica rice originating from Cambodia and Myanmar/Burma. The duties will amount to 175 euros a metric ton in the first year, 150 euros a ton in the second year and 125 euros in the third. Rather than claim victory, we should prepare for a 3-year period of hard work to get ready for the 'resumption of hostilities'.

Will origin labelling determine a price increase?

The introduction of origin labeling is important to enhance the Italian production, but it's not the main reason for the increases registered in the price of Italian paddy rice. Most of the Italian rice is not intended for the preparation of typical Italian risotto. Starting from September 2017, all types of Italian rice have shown signs of recovery and prices have started a positive trend that is still underway. Origin labeling is not the driving force behind recovery and this is demonstrated by the fact that the rice varieties that are not intended for risotto are also those that have performed better: Selenio, mainly intended for ethnic cuisine (sushi), Sole and Round, mainly intended for the agri-food industry, S. Andrea, mainly destined to the German market of Turkish ethnicity, Baldo and similar, mainly destined to the Turkish market.

Riso italiano: come tutelare il settore?

Il mercato sta vivendo un momento di importanti criticità e problematiche legate ai prezzi e alle nuove dinamiche dell'industria agroalimentare. Per tutelare il settore, negli ultimi mesi sono state messe a punto diverse soluzioni. Tra le più significative, l'obbligo di riportare in etichetta le informazioni riguardanti il Paese di origine del riso (coltivazione, lavorazione e confezionamento) per valorizzare i prodotti made in Italy, e la decisione della Commissione europea di introdurre una clausola di salvaguardia imponendo i dazi alle importazioni di riso dai Paesi meno avanzati, in particolare da Cambogia e Myanmar. Ne abbiamo parlato con Alberto Ferraris, amministratore di Oryzon Broker Company.

And then which are the reasons behind such a performance?

For all the varieties, starting from October 2018 a recovery in prices has been registered, mainly due to the decrease in the land cultivated with rice. A reduction that amounts to 12,352 hectares compared to 2017 and 16,939 hectares compared to 2016. The most significant decrease has been noticed for the Round: 9,138 hectares less than in 2017. The Selenio variety had the greatest price increase, also due to the presence of a significant rate of damaged grains, that have contributed to reducing net production.

For the Sole variety, as for the Baldo, Volano and similar risotto varieties, the excessive August heat caused stress in the ripening phase, thus contributing to a reduction in net production. Unfortunately, in the ENR budget it was not possible to take into account the net production losses caused by defects. In all markets, the price is determined by the interaction of supply and demand. As for rice, a reduced product offer helped to raise the prices. With no connection, hence, with the introduction of new regulations.

Which are the proper strategies to support rice farming?

We must be well aware that there is a difference between Italian rice (rice for risotto) and Italian rice farming. It is hard to imagine that we could save the Italian rice farming solely by promoting the culture of Italian rice. Moreover, there is not a single type of rice farm. Today, there are two different kind of rice farming: the rich one and the poor one. The implementation of one single strategy that is suitable for both is not realistic. Recently, every trade association expressed its own ideas and projects, too often differing from each other. Origin labels, new certifications, new laws do not always take into account the evolution of the market, consumer expectations or the new food trends. Classic rice, sustainable rice, vegan rice… they can create confusion in a consumer who, especially in times of crisis like this, relies on what he knows or simply reduces the consumption, as it already happened.

CONSUMERS UNDER THE MAGNIFYING GLASS

EUROMONITOR INTERNATIONAL'S LATEST REPORT REVIEWS
THE 10 EMERGING FAST-MOVING TRENDS EXPECTED TO GAIN TRACTION IN THE YEAR AHEAD.

Market research provider Euromonitor International has released its annual list of top emerging trends that provide insights into consumers' changing values and explores how their behaviour is disrupting business globally. "Intelligence is the common thread linking all trends in 2019. In a world full of choices, consumers' needs and wants are fast-changing. How we live is so centrally dependent on the choices available that the biggest issue we face is how to make sense of it all", said Gina Westbrook, director of lifestyles at Euromonitor International.

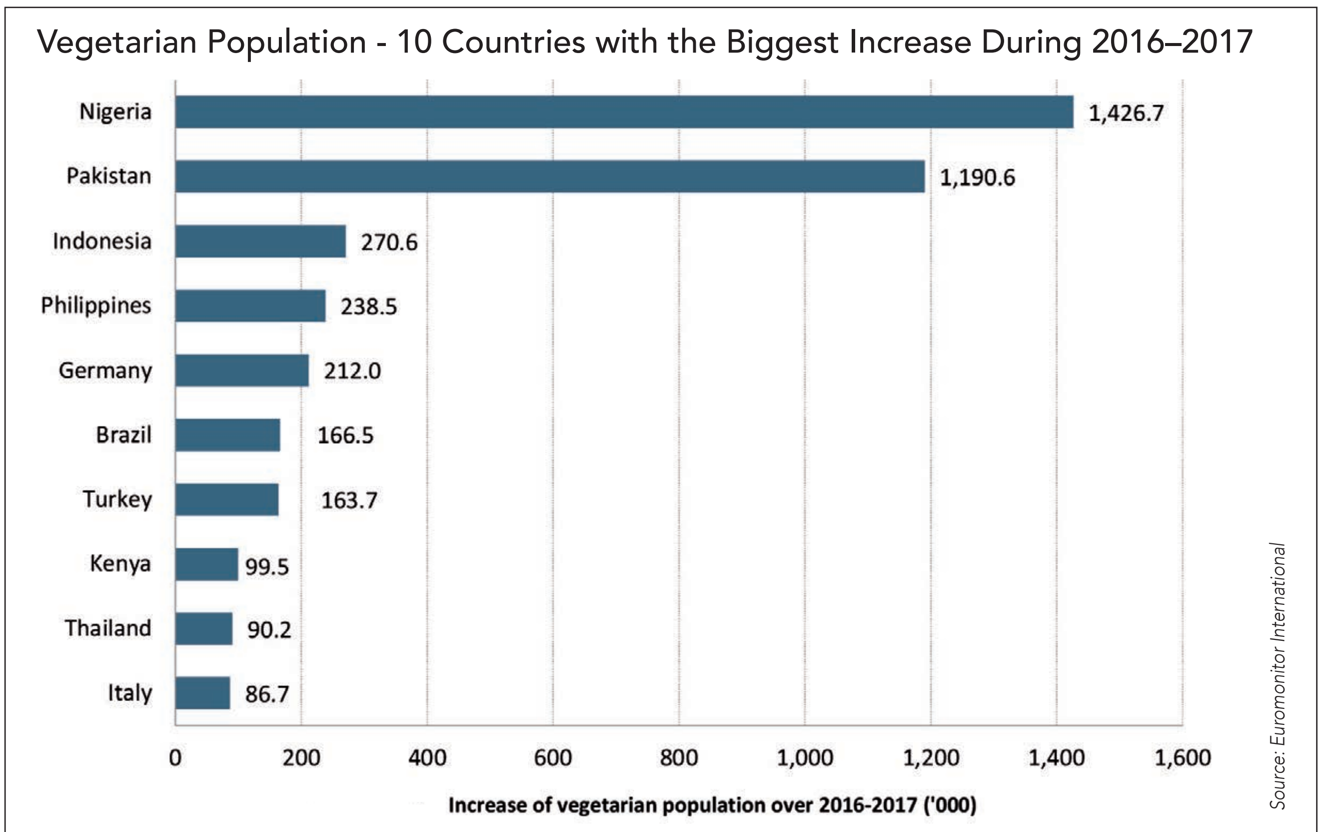
According to the white paper, called 'Top 10 global consumer trends for 2019' older consumers should be at the centre of business strategies. As people live longer and take better care of themselves, seniors feel and want to be treated as younger. Older generations are also at the core of the 'Loner Living' trend, as seniors living alone far outnumber younger generations. According to the study, indeed, the number of single-person households will increase by about 120 million by 2030.

Consumatori sotto la lente d'ingrandimento

Pubblicata da Euromonitor International l'edizione 2019 del report annuale che analizza i principali trend di consumo che plasmeranno il settore del Largo consumo confezionato nei prossimi 12 mesi.

ANIMAL-FRIENDLY MOVEMENT RISING FAST IN DEVELOPED ECONOMIES

Veganism was once regarded as confined to extremists but is increasingly adopted by a wide range of people: from the health-conscious to those concerned with animal welfare to those who see how the environment is negatively affected by industrial meat production. Today, veganism is no longer seen as a choice for life with total eradication of animal-based products with today's 'Conscious Consumers' having a more flexible approach to their consumption and choosing to be vegan - or flexitarian - for one meal, one or two days a week. A plant-based diet and concern for animal welfare is part of the greater healthy and ethical living trend shaping Conscious Consumers' choices nowadays. Though this is true for developed economies, in emerging markets there is a deep-rooted perception of meat as good nutrition and a sign of prosperity. But even in these developing regions, like China Indonesia and India, young, urban, middle- and high-income consumers are also advocates of the new Conscious Consumerism trend. The rise in this more conscious consumption approach has consequently seen increasing demand for plant-derived ingredients such as plant extracts, essential oils, xanthan gum and vegetable waxes in beauty products, while animal-derived ingredients such as collagen and lanolin are losing their popularity. The increase in the number of vegetarians and vegans has also contributed strongly to the increasing demand for animal welfare label sales in food and beverages. Product features such as cruelty-free and not tested on animals, free range and grass fed / pasture raised increasingly influence purchasing decisions of Conscious Consumers. Furthermore, milk alternative and meat substitute sales continue to grow.



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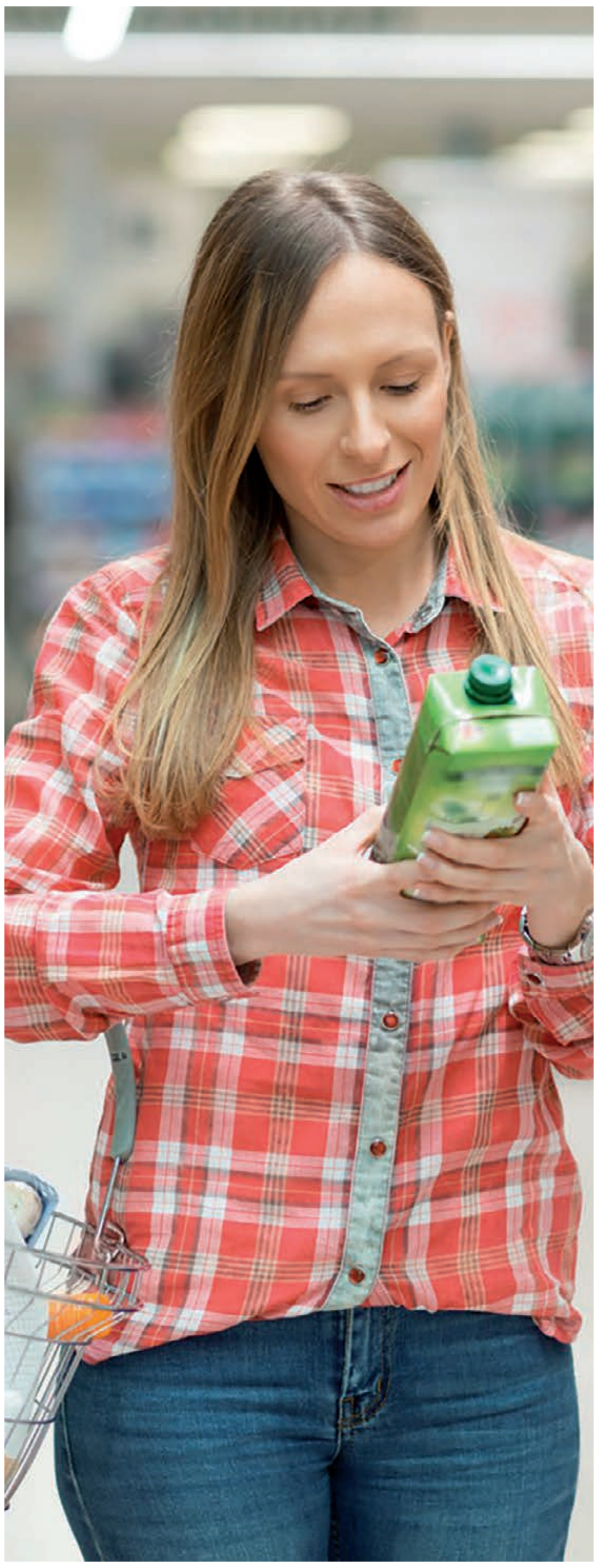
ARONA
ITALIA
Arona, 1946
Yesterday, the beginning of a story. Today, our greatest love.
It's our chocolate. For over 70 years, made with the same passion.

HYPE PRODUCTS HAVE GONE HYPERACTIVE, LEAVING CONSUMERS CRAVING SELF-SUFFICIENT SIMPLICITY

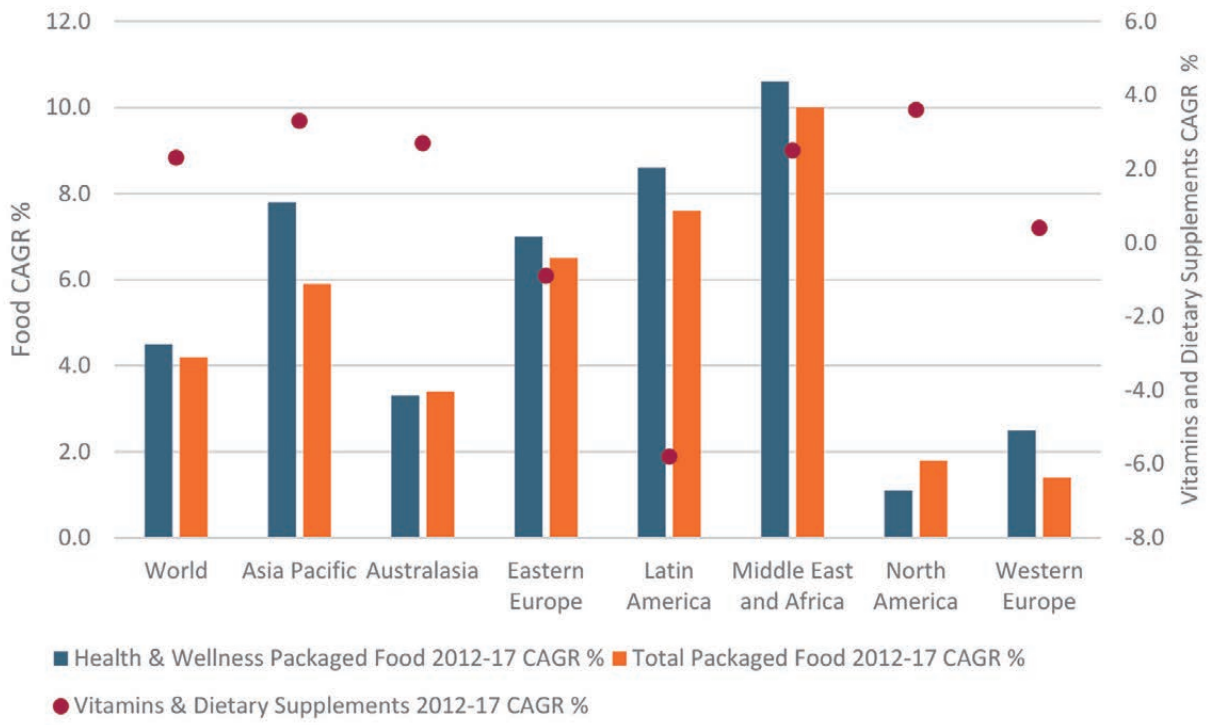
Hype products exist in all consumer industries but are particularly prevalent in luxury goods, food and nutrition, beauty and fashion, more recently, ethical labels. With so much choice and so many claims being made that promise to change one's life, consumers increasingly want to take control of their wellbeing, cut out the noise and stop relying on brands as much.

A global focus on Conscious Consumerism, environmental concerns and a move away from chemicals towards more 'natural' products have encouraged people to be more mindful about what and how they consume. The rise of social media and its infiltration into all parts of modern consumers' everyday lives has also put into perspective the amount on which we rely on devices, brands and companies just to get by.

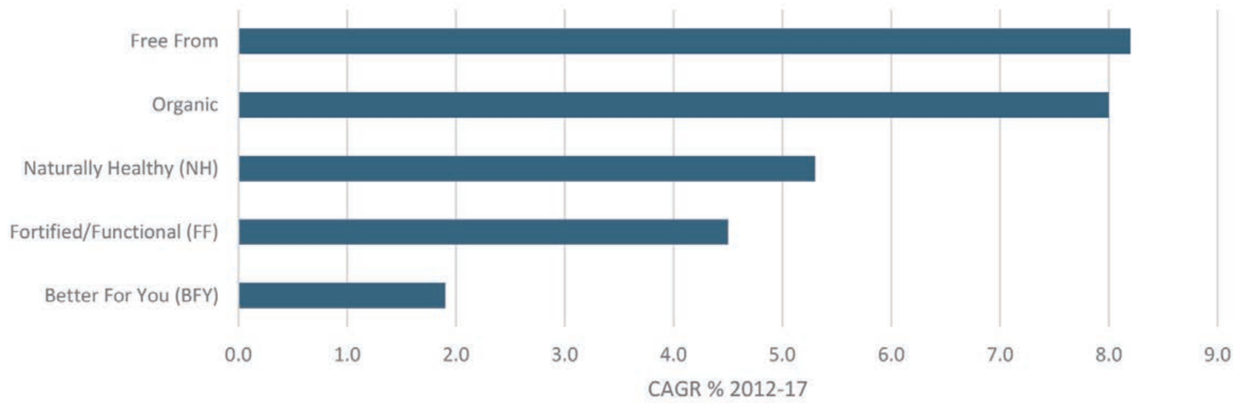
'I Can Look After Myself' consumers are active and engaged but turning to services that simplify, clarify and improve everyday life, rather than manage it for them. Foods with 'free from' labels are still the fastest growing category in packaged food, but apps such as Spoon Guru offer consumers a way to design their diet without having to rely on supermarket branding.



Health and Wellness Foods and Vitamins and Dietary Supplements Outpreform 2012–2017



Global Health and Wellness Moves to Clean Labels and Organic, away from BFY



Source: Euromonitor International

TOP 10 GLOBAL CONSUMER TRENDS FOR 2019

Everyone's an expert
Knowledge is power
At the root of this trend is the almost compulsive need for digital consumers to absorb and share information. Whereas previously shoppers relied on a certain brand or information source, now companies must constantly innovate to entice more inquisitive shoppers.

I can look after myself
Consumers cut out the middleperson and turn to alternative self-care methods
The focus is the preventative, consumable measures against illness, unhappiness and discomfort that people can take without having to consult a professional.

I want it now!
Efficiency-drive lifestyles and frictionless experiences
Consumers seek frictionless experiences that mesh with their lifestyles, allowing them to dedicate more time to their professional or social lives.

Back to basics for status
Less is more
Consumers are searching for authentic, differentiated products and experiences which allow them to express their individuality. Consumers in developed economies are re-evaluating their spending habits, moving away from overt materialism to simplicity, authenticity and individuality.

I want a plastic-free world
Consumers taking direct action to eliminate plastic waste
The push for a plastic-waste-free society has gained momentum. The durability of plastic packaging is being scrutinised because of plastic's polluting presence, post-consumer use, as waste in the global environment.

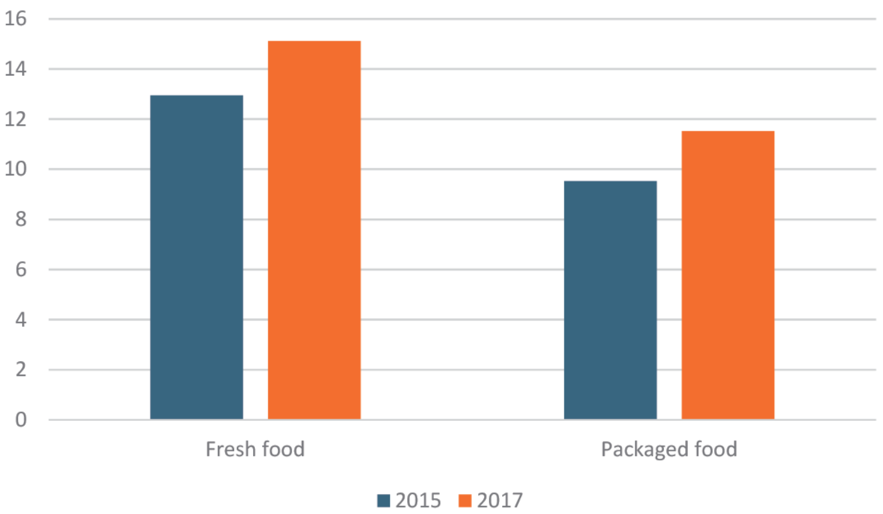
Conscious consumer
Being mindful in your buying
What used to be the domain of ethically-positioned niche producers is now being embraced by conventional companies through higher welfare alternatives of existing products. Animal welfare concerns will evolve further and extend to other industries.

Finding my JOMO
The joy of missing out
The fear of missing out has now given place to the re-appropriation of self-time as people find joy in missing out. To protect their mental wellbeing, consumers want to be more intentional with their

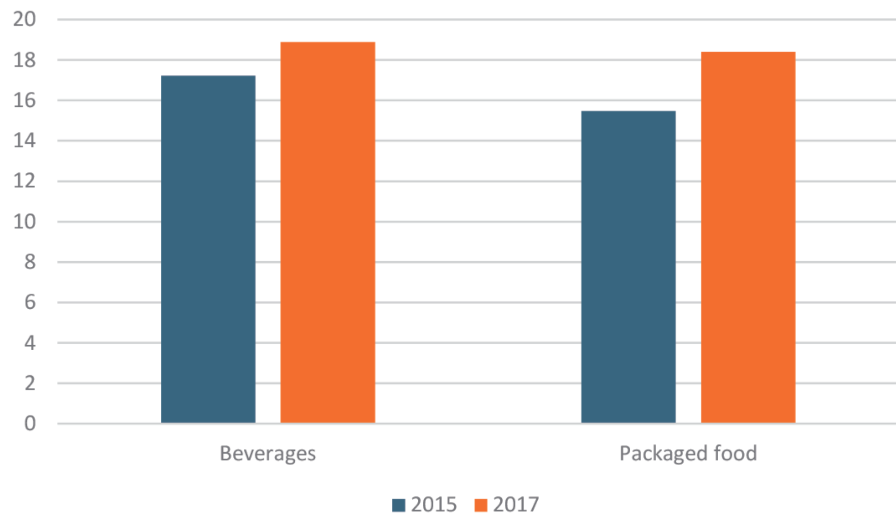
CONSUMERS ARE WILLING TO PAY MORE FOR ECO-FRIENDLY AND RECYCLABLE PRODUCTS

Euromonitor International estimates that 63% of global packaging across the food, beverage, beauty, home care and pet food industries is currently made from plastic. Plastic has become the preferred material for a range of reasons including its versatility and durability and has significantly contributed to reduction in food waste globally. But the rate at which this vast quantity of plastic packaging is recovered, recycled and re-used once its purpose has been served, is far from optimal and this is at the heart of the trend. Consumers are becoming increasingly sensitive to issues of plastic waste and this is impacting their shopping habits. The proportion of those willing to pay more for packaged food and fresh food which is environmentally conscious or eco-friendly has risen over the past two years. Similarly, the proportion of those who feel that recyclable packaging is an influential feature in beverage products has also grown.

% Willing to Pay More for 'Environmentally Conscious or Eco-Friendly' Products



% Willing to Pay More for Products with 'Recyclable Packaging'



Source: Euromonitor International's Lifestyles Survey (2015, 2017)

time, to set their own boundaries and be more selective in their activities.

Digitally together
Proximity is no longer a boundary
As our technological capabilities and comfort using them grows, so will the potential of what can be created or experienced together, remotely. Our growing comfort with sharing our friends, location and activities online will only lead to the development of new ways to engage.

Loner living
Loving the single life
People across the world are bucking the stigma of living alone and embracing their independent lifestyles and enjoying. The Pew Research Center estimates that by the time today's US young adults turn 50, 25% of them will have been single their whole life.

Age agnostics
Older people want to feel, behave and be treated as younger
Boundaries of old age are shifting. As people live longer and take better care of themselves, older consumers feel and want to be treated as younger. The key to winning and retaining loyalty and trust is to develop products and services that are universally accessible even while designed with older people in mind.

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ANUGA BECOMES 100 YEARS OLD

THE 35TH EDITION OF THE WORLD'S BIGGEST BUSINESS PLATFORM FOR THE INTERNATIONAL FOOD INDUSTRY WILL TAKE PLACE FROM 5 TO 9 OCTOBER 2019 IN COLOGNE. AROUND 7,400 EXHIBITORS FROM 100 COUNTRIES ARE EXPECTED.

Stuttgart (Germany), 1919. This is the where and when of the very first edition of Anuga, international food & beverage trade show that is celebrating this year its 100th anniversary (Cologne, 5-9 October 2019). It was a small-scale samples show, at which around 200 exclusively German companies took part. Today, with 7,405 exhibitors and around 165,000 trade visitors, Anuga is the largest and leading industry get-together of the global f&b industry, with a 90% share of foreign exhibitors and 74% share of visitors from abroad. With the impressive '10 trade shows under one roof' concept, the trade fair offers the top buyers from all over the world a more well-arranged structure and clear orientation. As usual, also in 2019 Italy will be widely represented at the trade show, with a large participation of Italian companies and regional collectives. Paraguay, instead, will be Anuga's official partner country for the 2019 edition: this is the first time the organizers chose a South America country.

Anuga compie 100 anni

La fiera internazionale del food and beverage organizzata da Koelnmesse festeggia quest'anno il 100esimo anniversario. E ribadisce il suo ruolo di piattaforma centrale per il settore alimentare nel mondo, oltre che di fonte d'ispirazione, tendenze e innovazione. Questa 35esima edizione (Colonia, 5-9 ottobre 2019) preannuncia la partecipazione di oltre 7.400 espositori provenienti da circa 100 paesi e più di 165mila visitatori specializzati da tutto il mondo.

'10 TRADE SHOWS UNDER ONE ROOF'

Anuga Fine Food
Focus on delicatessen, gourmet and basic food. The largest of the Anuga trade shows unites a comprehensive and diversified offer - including typical food and regional specialties - from all over the globe. Cross-cutting issues such as halal, superfoods or functional foods are also at home here.

Anuga Frozen Food
The frozen food segment is one of the most important trendsetters within the trade and on the hospitality and foodservice market. At Anuga, the international industry regularly presents its innovations for both channels - the food trade and the out-of-home market.

Anuga Meat
Comprising of the sub-segments sausages, red meat and poultry, the world's largest business platform for the meat market offers the trade buyers an excellent orientation. Meat alternatives, whether vegan or vegetarian sausage products or meat products made of insects also find their platform here.

Anuga Chilled & Fresh Food
The trade show for fresh convenience foods, fresh delicatessen, fish, fruit & vegetables. The trendsetter segment, which has a fixed place at Anuga, predominantly presents products for consumers with little time as well as in-between snacks.

Anuga Dairy
Anuga dairy bundles international market leaders as well as specialists from all over the globe and serves the entire global market with the largest and most significant collection of products and innovations.

Anuga Bread & Bakery
Bread and bakery products in combination with jam, honey, chocolate-nut spreads, peanut butter and other sandwich spreads are an equally important assortment for the trade as well for the morning breakfast buffet of hotels.

Anuga Drinks
Beverages for the retail and food service trades. Anuga offers a wide selection of products for both target groups: from alcohol to alcohol-free.

Anuga Organic
Anuga Organic presents a wide range of organic products from Germany and abroad with a clear focus on export. The range of exhibits is enhanced by the special event 'Anuga Organic Market', which also focuses on the organic products of Anuga exhibitors from other trade shows.

Anuga Hot Beverages
Here, Anuga is presenting coffee, tea and cocoa at their own trade show and is thus doing justice on an international level to the theme that is attractive for both the trade and the out-of-home market.

Anuga Culinary Concepts
The hospitality and foodservice market is growing further and also provides the trade with new impulses. The newly created Anuga Culinary Concepts offers room for ideas, innovations and networking.

PRIDE, PASSION AND STRONG ITALIAN TRADITIONS PASSED DOWN THROUGH GENERATIONS.

A journey in a world of flavours

LE FAMIGLIE DEL GUSTO

SAN MICHELE SALUMIFICIO · SALUMI COATI · Felsineo · Felsineo Veg

Le Famiglie del Gusto is a network based on the **collaboration of three leading Italian companies**, specialised in the production of Italian cured meat for over 50 years.

The **family** is the greatest value that unites these companies. This common value lies at the core of each company and determines also its strength.

ANNUAL PRODUCTION OVER	PRODUCTION FACILITIES	TOTAL EMPLOYEES OVER	TOTAL TURNOVER OVER
45000 TONS	9	300	170 MIO EUROS

SWINE MARKET

CHINA IS GETTING CLOSER

SIGNED A PROTOCOL FOR THE EXPORT OF ITALIAN PORK MEAT TO THE ASIAN COUNTRY. WHERE THE AFRICAN SWINE FEVER VIRUS IS WIPING OUT ENTIRE HERDS. DETERMINING A STRONG INCREASE IN DEMANDS. RISKS AND OPPORTUNITIES FOR BUSINESS OPERATORS.

29 memorandum of understanding have been signed between the Italian and Chinese government as part of the 'Silk Way' project, during Chinese President Xi Jinping's visit to Rome, on the past 21-23 March. Energy, ports, 'Panda bonds', technological innovation, promotion of made in Italy, export of citrus fruits, bovine seeds and frozen pork meat were some of the sector most afflicted by the deals. The latter, in particular, has been the protagonist of a 15-year negotiation that interested many Italian institutions, including Assica, the Italian Association of meat and cured meat producers.

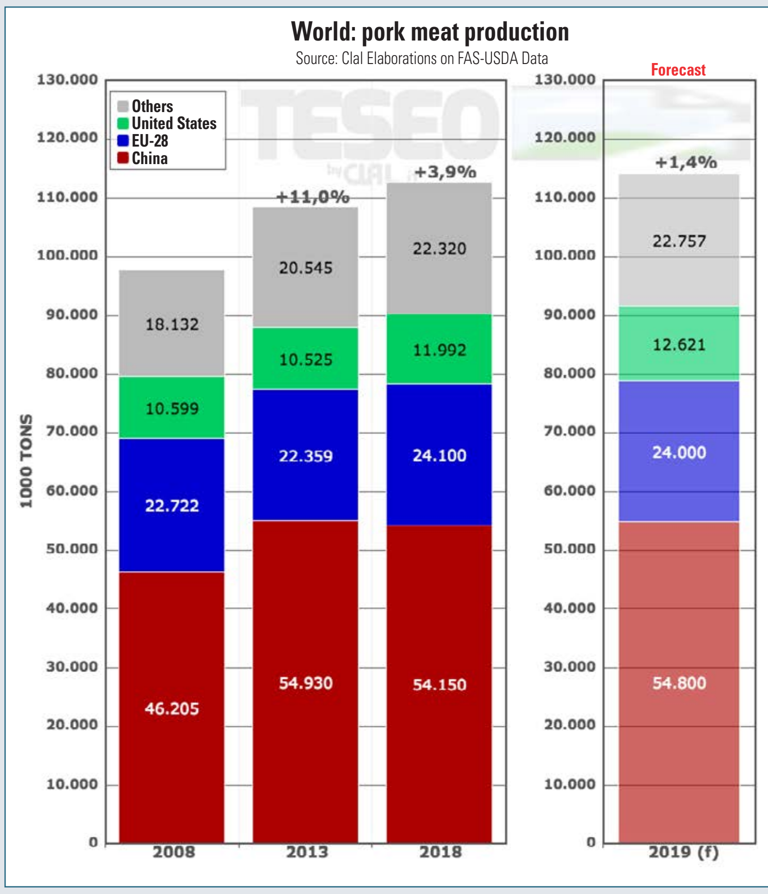
"I am proud to announce this extraordinary result for our country, that Assica has contributed to achieving. We have been pursuing it with determination and perseverance for over 15 years, supporting our institutions in a long and difficult negotiation with the Chinese authorities," said Nicola Levoni, president of Assica. "My thanks go to all those who have worked hard and together for so many years, convinced that all of the Italian pork products deserved to enter the big Chinese market, so far reserved for raw hams and cooked products."

In order to become operative, the Italian Health Minister will now establish - in collaboration with General Administration of Customs of the People's Republic of China - the authorization procedures for the slaughtering facilities and the sanitary certificate that will allow our meats to enter China's borders.

The n.1 market for EU pork meat

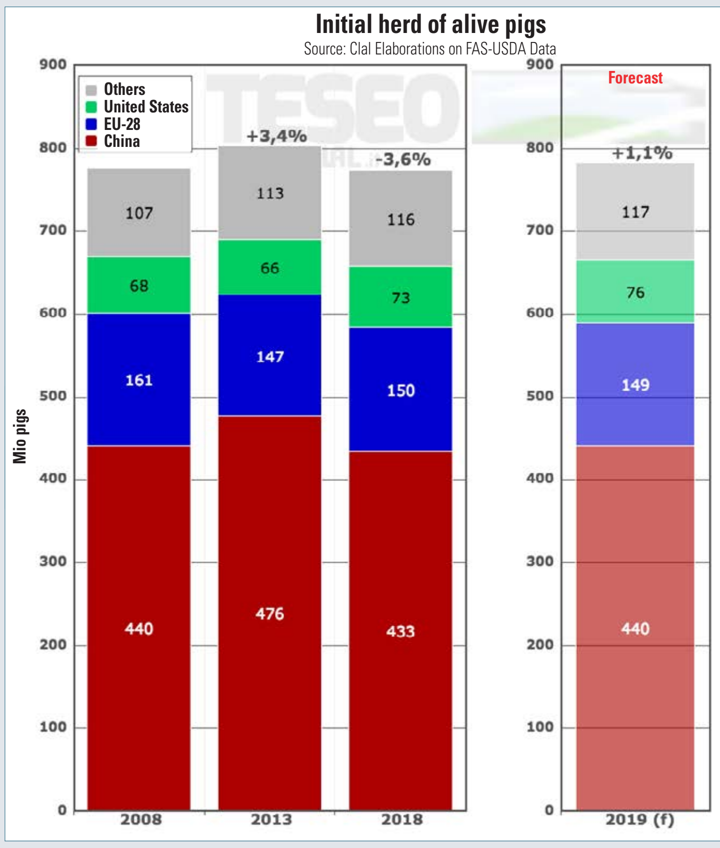
The opening of the Chinese market to our exports could generate, in a first stage, a 50 million euro turnover for companies operating in the sector. In 2018, China ranked first among the leading destination markets for pork meat, accounting for 34.4% of total EU exports. Japan, with an 11.6% market share, occupies the second place. If we take a look at the composition of EU pork exports to China, we observe that refrigerated or frozen pork accounts for 47.3% of total exports; meat products for 0.1%; offal 51.5%; fat and lard 1.1%. The European countries that export the most to China are Germany, Spain, Denmark, the Netherlands, France and Ireland.

As for Italian products, raw hams seasoned for at least 313 days are allowed for export since 2007, and cooked products like mortadella or cooked



Country	Pork meat production - year 2018 Production 1000 tons	% +/- over 2017
CHINA	54.150	+1.4%
EU-28	24.100	+1.8%
UNITED STATES	11.992	+3.3%
BRAZIL	3.675	-1.3%
RUSSIA	3.235	+7.8%
VIETNAM	2.675	-2.4%
CANADA	1.960	+0.1%
PHILIPPINES	1.600	+2.4%
SOUTH KOREA	1.375	+7.4%
MEXICO	1.310	+3.4%
JAPAN	1.285	+0.2%
OTHERS	5.205	+0.8%

Source: Clal Elaborations on FAS-USDA Data



Country	Pigs - year 2018 Initial herd 1000 pigs	% +/- over 2017
CHINA	433.250	-0.4%
EU-28	150.000	+1.9%
UNITED STATES	73.445	+2.7%
BRAZIL	38.829	-1.0%
RUSSIA	23.058	+5.3%
CANADA	14.250	+2.3%
SOUTH KOREA	11.273	-1.9%
OTHERS	29.082	-1.5%

Source: Clal Elaborations on FAS-USDA Data

Source: Teseo by Clal

ham since 2013. Nevertheless, at the moment Italy detains a very limited market share, mainly due to the difficulties determined by two completely different culinary traditions and by huge bureaucratic burdens. "The limitations previously set to the range of exportable goods have severely disadvantaged our country," said Nicola Levoni. "The next goal, as soon as the first shipment of Italian frozen pork meat enters China, is to resume the negotiations for the export authorization of all Italian deli meat products."

The swine fever epidemic is spreading

If on the one hand, the Chinese market opens up new business opportunities for our export, on the other hand, there is a big challenge to face, namely the African swine fever. A virus with no cure, deadly to animals but harmless to humans, which is creating big problems in China, the world's largest consumer of pork meat: more than 430 million pigs are bred in China, 56% of the entire global heritage (Teseo by Clal data). A Reuters' investigation helped to shed light on the matter, portraying a much troublesome scenario. Hence, the estimates issued by Chinese authorities are accused of being 'influenced' by local administrations, which have the task of keeping the situation under control and to refund the farmers who are forced to kill the animals: 1,200 yuan (158 euros) each. In order to avoid the payment of such refund, local administrators often 'forget' to communicate the new outbreaks. The investigation mentions the companies that have applied for a refund and have waited a long time before receiving it. Official data show a 16% decrease in the spread of the epidemic, but the reality is probably quite different, with a heavy decrease in the production of pork meat in 2019.

The peak of Chinese demand and the decrease in EU stocks

The spread of the epidemic is leading to an unprecedented lack of raw materials, which leads to difficulties in supplies. At the base of this lack, there is the significant increase in Chinese demand, due to the above-mentioned rapid spread of the virus and the continuous decrease in the number of animals reared in the country, down by over 80 million animals. All this has gone hand in hand with the decline in the number of European pigs, due to the low prices and the growing investments made by farms to meet animal wellbeing standards. As a result, the number of animals slaughtered in Europe is determining a constant decrease in stocks, and stocks in refrigerators have reached the minimum levels. Moreover, we are facing an increase in costs for companies in different sectors, including transport, logistics, packaging, energy, insurance. Given the significant numbers of the swine fever issue, the scenario is not expected to change in the short term. With heavy consequences also for Italian producers.

Number of pigs - Balance sheet in pigs x 1000 I year 2018

Source: Teseo by Clal, USDA, latest update: 16/10/2018

Country	Initial herd		Number of births		Import		Export		Losses		Slaughters		Final herd	
World	773'187	+0.4%	1'297'689	+2.5%	5'715	+0.5%	7'686	+0.8%	29'466	+7.0%	1'257'874	+2.0%	781'565	+1.1%
China	433'250	-0.4%	708'000	+2.7%	10	+66.7%	1'600	+2.8%	1'660	+47.0%	698'000	+1.4%	440'000	+1.6%
EU-28	150'000	+1.9%	271'500	+1.7%	8	+33.3%	600	+77.0%	6'008	+7.2%	266'000	+3.0%	148'900	-0.7%
United States	73'445	+2.7%	133'966	+3.5%	5'625	+0.4%	57	-3.4%	12'238	+3.8%	124'991	+3.0%	75'750	+3.1%
Brazil	38'829	-1.0%	40'000	-0.6%	1	0.0%	6	+20.0%	1'289	+10.9%	39'300	-0.4%	38'235	-1.5%
Russia	23'058	+5.3%	46'500	+6.7%	4	-33.3%	8	+33.3%	2'604	+7.2%	43'100	+7.8%	23'850	+3.4%
Canada	14'250	+2.3%	28'600	-1.7%	3	0.0%	5'400	-3.8%	1'453	+1.8%	21'800	+0.2%	14'200	-0.4%
Others	40'355	-1.6%	69'123	+2.9%	64	+3.2%	15	-64.3%	4'214	+5.7%	64'683	+1.3%	40'630	+0.7%

EU EXPORTS TO CHINA IN 2018

34.3% OF EU PORK MEAT EXPORTS

- Frozen or refrigerated pork meats: **47.3%** of the total
- Meat-based products: **0.1%**
- Offal: **51.5%**
- Fat and lard: **1.1%**

ITALIAN CURED MEATS THAT CAN BE EXPORTED TO CHINA

RAW HAMS SEASONED 313 DAYS
COOKED HAMS
MORTADELLA

La Cina è vicina

Sono 29 gli accordi siglati tra il governo italiano e cinese nell'ambito del progetto Via della seta. Tra cui quello relativo all'export di carne suina dall'Italia. L'intesa è stata protagonista di una trattativa diplomatica durata oltre un quindicennio, che ha visto in prima linea numerosi enti italiani, tra cu Assica. Un aggiornamento sullo stato dell'arte del mercato suinicolo cinese, dove il virus della Peste suina africana sta decimando gli allevamenti determinando un aumento della domanda. Le opportunità e i rischi per il settore.

F&B: THE STATE OF THE GLOBAL MARKET

OVERALL RETAIL VALUE REACHED 2,43 TRILLION US DOLLARS IN 2018. ASIA PACIFIC IS SET TO BECOME THE WORLD'S BIGGEST CONSUMER BY 2030. THE RESULTS OF GULFOOD'S GLOBAL INDUSTRY OUTLOOK REPORT FOR 2019.

Driven by the rise in population, demand for packaged food and beverages is set to see further growth by 2030: overall consumer spending on f&b is set to rise in value from 8.5% to 8.9% of GDP.

The unprecedented shift from rural to urban living is a major population change impacting global consumption habits, as well as migration and the rise of the middle class.

Changing consumer preference for food and beverage demand has created more opportunities for innovation within the industry with a focus on premiumisation and value-adding features and/or ingredients. A portrait of tomorrow's consumer would look young, likely below the age of 30, urbanised and potentially living in sub-Saharan Africa, Asia Pacific or Latin America.

These are just some of the key findings from the new 'Gulfood global industry outlook report 2019', an in-depth market research study commissioned by the Dubai World Trade Centre to the agencies Euromonitor International and GRS Research and Strategy.

Between January 6th and 26th 201,634 senior f&b professionals, based in 109 different countries across the world, responded to a 10-minute survey, sharing their experience and expectations for the future. All sectors in the agri-food supply chain were included: confectionery, snacks and ready-to-eat; pulses, grains and cereals; premium gourmet and fine foods; ingredients; meat and poultry; dairy, seafood; fats and oils.

F&B: un'analisi del mercato globale

Un report firmato Gulfood e realizzato da Euromonitor e GRS Research and Strategy descrive in modo accurato e trasversale il mercato mondiale di alimenti e bevande, che nel 2018 ha raggiunto il valore di 2,43 triliardi di dollari. Lo studio formula previsioni sullo sviluppo tanto del settore industriale quanto distributivo al 2023. Un business che sarà sempre più trainato dal mercato asiatico e nordafricano. E che vede nel premium, nel biologico e nel salutistico i principali driver di sviluppo.

INDUSTRY KEY FIGURES

	Asia Picific	Australasia	Europe	Latin America	Middle East&North Africa	North America	Sub-Saharan Africa
Total F&B 2001-2016 growth	3.0%	1.0%	0.5%	0.1%	3.0%	0.4%	3.5%
Total F&B 2016-2021 growth	3.6%	2.0%	1.2%	2.6%	3.5%	0.9%	4.1%
Fastest growing retail channel 2017-2018	Internet retailing (34%)	Internet retailing (10%)	Internet retailing (7%)	F/D/T Specialists (11%)	Internet retailing (27%)	Internet retailing (9%)	Internet retailing (34.2%)

Source: The World of Good Food - Global Industry Outlook Report 2019

MARKET DRIVERS & TRENDS

- Sustainability - locally produced ingredients
- Improved f&b food safety and hygienic preparation
- Flavour diversification, both Westernisation and ethnic
- Single serve, smaller packaging reflecting smaller households, on-the-go consumption and health concerns
- Increased label scrutiny regulations
- Rising unit prices, raw material and VAT
- Increasing importance of ethical positioning, such as Halal, recycled, eco-friendly or organic
- Growing interest in plant-based f&b substitutes in ingredients, flavourings, sweeteners and protein sources
- Scaling up of leading f&b companies through m&a activity to offset challenge of online giants and current consumer trends

FOCUS ON: INDUSTRY

Asia and North-Africa are driving growth

Overall retail value of food and beverage sales across the world in 2018 reached 2,43 trillion US dollars, up from 2.27 trillion US dollars in 2013. Based on an expected forecast Cagr of 2.1%, the industry is projected to reach 2.73 trillion US dollars in 2023. While beverages alone are projected to see a slightly better performance, with a Cagr of 2.2% between 2018 and 2023, they also account for a significantly lower portion of the market. Value sales of soft drinks and hot drinks alone stand at 0.69 trillion US dollars in 2018. They are expected to reach 0.77 trillion US dollars in 2018.

Coming from a low per capita base, Sub-Saharan Africa will be the most rapidly expanding food and beverage market between 2018 and 2023, forecasted to witness a Cagr of 3.84%. In actual terms, however, Asia Pacific is set to be significantly more important. With a Cagr of 3.47% in the same timeframe, the region will see value sales increase by 143 billion US dollars, compared to merely 17 billion in Sub-Saharan Africa. In both regions, sales are benefiting from burgeoning populations, rapid urbanization and better access to packaged food and beverage items. The star performer in Asia Pacific is thereby India: the country is expected to see the highest percentage growth between 2018 and 2023, as well as the second highest increase in actuals. The most important supporter of growth within food and beverages in Sub-Saharan Africa is Nigeria.

What about the rest of the world?

Similar developments are expected to boost growth in the two most important markets in Latin America: Brazil and Mexico. Brazil is additionally benefiting from an economic recovery process after the country's worst recession took place in 2014. In more mature markets, like Turkey or the Gulf countries, premiumization, high disposable incomes and a growing number of young urbanized professionals interested in global food trends and brands are expected to shape the food and beverage market. In other countries such as Iran, Morocco or Egypt demand is driven by a further shift towards packaged products and the spread of modern retailing. The expansion of supermarkets and hypermarkets is making a broader variety of packaged food and beverages available to consumers. The slowest growth of food and beverage sales over the coming five years is expected in North America. Canada and the US are saturated and mature markets with an increasing urban population and a growing number of single households. Both is benefiting foodservice sales rather than retail sales. Growth opportunities are therefore mainly found within innovative health and wellness as well as specialty products, as increasing rates of obesity, diabetes and cardiovascular diseases force many to reconsider unhealthy eating habits. Similar developments can be seen in Europe, where health and wellness is often seen as a key driver. The region is additionally benefiting from growth in less mature markets in Easter Europe, such as Russia, Poland and the Ukraine.

Beverages · Dairy · Poultry · Pulses, Grains & Cereals · Fats & Oils · Seafood · Cooking Ingredients · Confectionery, Snacks and Ready-to-eat

The colour of the industries indicates growth rate: Above global average · Global average · Below global average

	Europe	North America	Middle East & North Africa	Latin America	Sub-Saharan Africa	Asia Pacific	Australasia
Beverages	1.9%	0.5%	3.6%	2.7%	4.7%	2.7%	2.7%
Dairy	1.0%	0.0%	2.9%	2.6%	3.3%	4.4%	1.9%
Poultry	0.3%	0.7%	5.2%	2.9%	2.5%	2.3%	0.2%
Pulses, Grains & Cereals	0.8%	-0.2%	3.8%	2.0%	5.1%	3.7%	1.1%
Fats & Oils	1.1%	-0.5%	3.4%	2.4%	3.4%	8.3%	2.3%
Seafood	1.5%	1.1%	5.2%	2.5%	3.0%	-1.2%	2.1%
Cooking Ingredients	1.3%	1.2%	3.2%	3.5%	4.2%	3.3%	0.6%
Confectionery, Snacks and Ready-to-eat	1.4%	1.7%	3.3%	2.5%	3.7%	3.5%	2.4%

Source: The World of Good Food - Global Industry Outlook Report 2019

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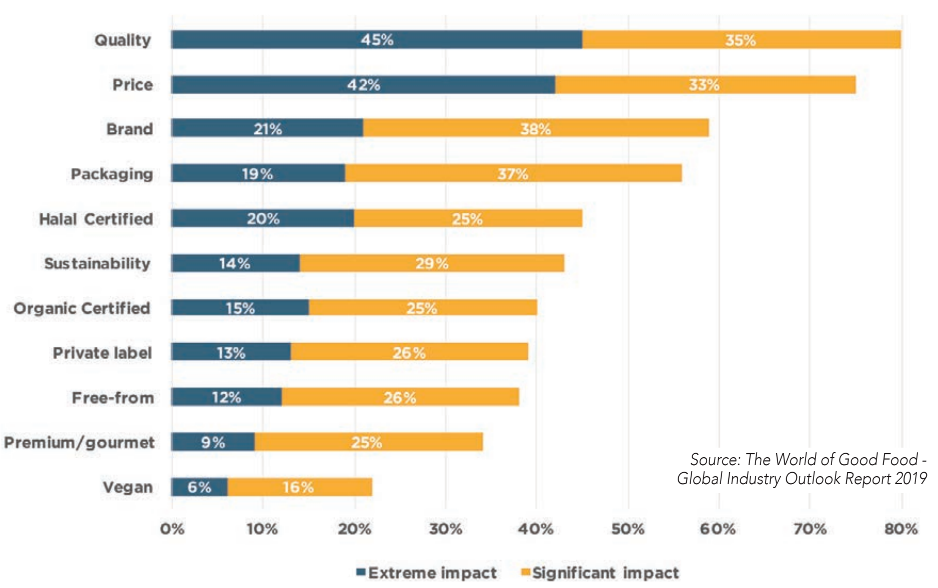
FOCUS ON: THE VOICE OF THE INDUSTRY

IN YOUR OPINION, HOW MUCH WILL THE FOLLOWING FACTORS IMPACT CONSUMER'S PURCHASING DECISION IN 2019?

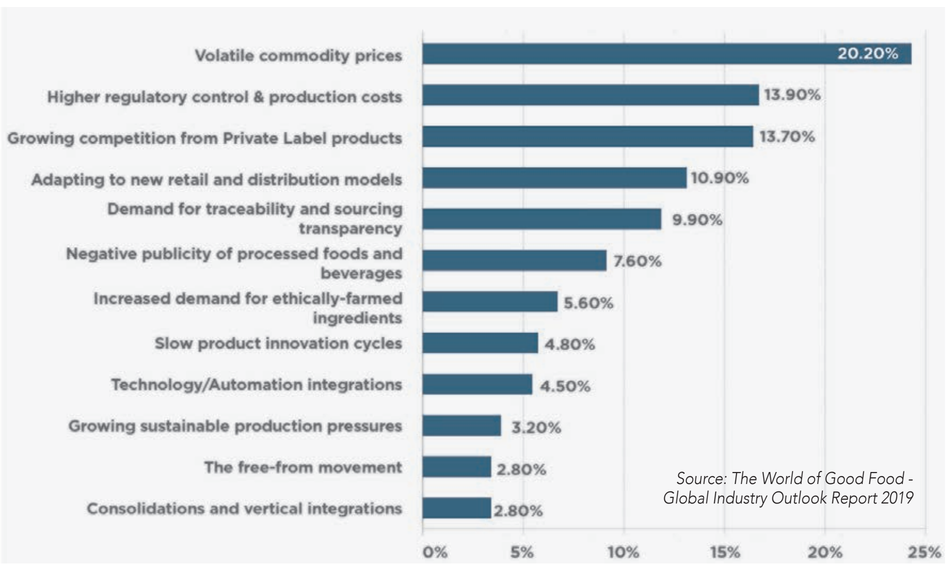
CONSUMER ATTENTION



Quality is considered to be the most impactful variable in consumer's purchasing decision, slightly more than price, and significantly more than all other aspects. The only sectors for which price is considered to have a more important role than quality are: dairy, fats & oils, meat & poultry. Interestingly, aspects such as Halal and Organic certifications, sustainability, and free-from are not in the top three consumer priorities, even though these are considered to be key trends right now. Core elements of quality, price, brand, and packaging are still leading purchasing decisions, according to the survey respondents. Quality is more important than price, and brand is more relevant than packaging across all regions, except for Sub-Saharan Africa.

IN YOUR OPINION, WHAT'S THE MAIN CHALLENGE / THREAT FOR THE FOOD AND BEVERAGE INDUSTRY?

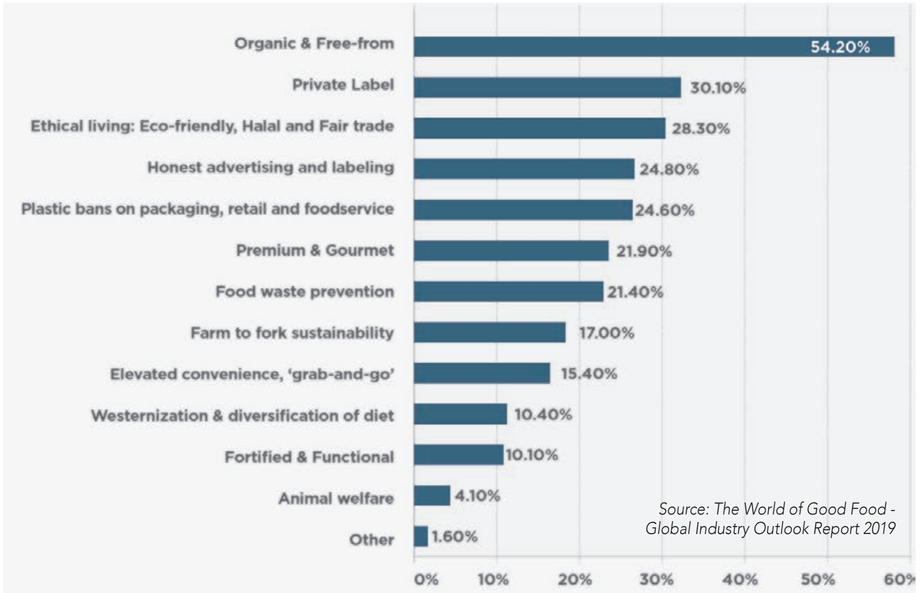
MAIN CHALLENGE



There are significant differences depending on the regions in which respondents operate. Growing competition from private label is considered as the n.1 challenge by relatively more companies in MENA (17.3%) and Europe (14.2%), whereas 'higher regulatory control & production costs' was mentioned by 26.3% of respondents in the Americas. In the Sub-Saharan Africa, adapting to new retail and distribution models is the main challenge for 16.7% of companies, second only to volatile commodity prices (21.9%).

WHAT ARE THE 3 MOST IMPORTANT TRENDS IN THE F&B INDUSTRY?

KEY TRENDS

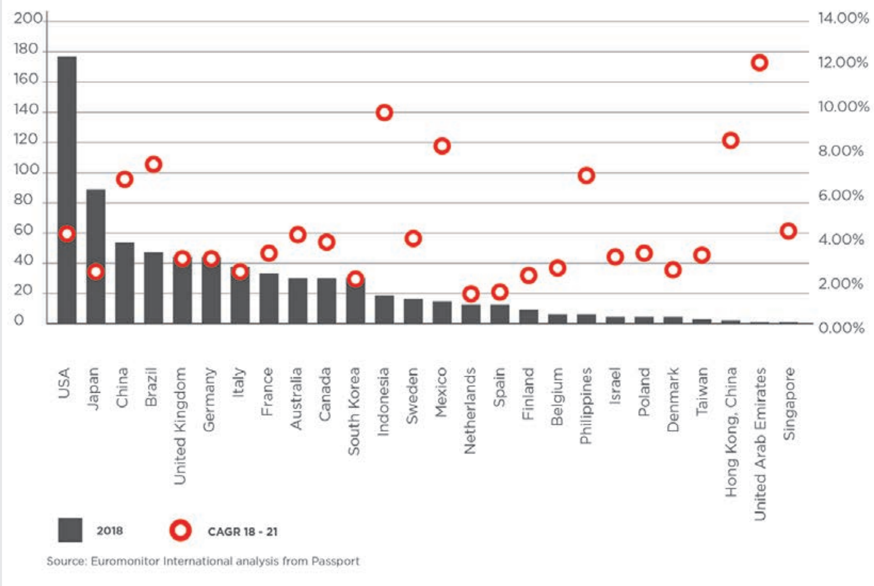


More than 50% of senior F&B professionals who took part in this research consider "Organic & Free-from" as one of the 3 most important trends in the industry. Regarding other key trends, besides for "Private Label" in second place, 3 of the top 5 have to do with "ethics": the concepts of being eco-friendly, conscious of the effect of plastic on the environment, concerned of fair trade, and practicing honest advertising are considered to be key factors today and for the years to come.

ETHICAL LABELS

Emerging markets have displayed considerable growth for ethical label products and are projected to carry this momentum forward into the forecast. Although established markets for ethical labels continue to grow, said growth is less than dynamic – USA, Japan and the UK all have forecast CAGRs below 5.0% leading up to 2021. China, Brazil, Indonesia, on the other hand, all have forecast CAGRs above 5.0%, further highlighting developing and emerging markets as potential markets of the future for ethically labelled product manufacturers.

TOP COUNTRIES IN ETHICAL LABELS (US$ BILLION)



FOCUS ON: DISTRIBUTION

Focus on retail: good and bad performers

Super and hypermarkets now control 51% of total packaged food value sales, down from 54% in 2013. In beverages, the channel represents 39% of soft drink volume sales in 2018, down from 41% in 2013; and 44% of hot drink volume sales, down from 47%. This drop reflects a shift in many countries towards internet retailing, convenience stores and discounters.

While many retail trends appear on a global scale, there are still significant differences in the overall landscape. In Sub-Saharan Africa, Middle East & North Africa and Latin America traditional grocers are the most important channel for packaged food value sales. In beverage volume sales, however, they dominate Sub-Saharan Africa, Asia Pacific and within soft drinks Latin America. In all other regions, supermarkets and hypermarkets are already established as the leading retail channel within foods and beverages.

The fastest growing on a global scale was internet retailing. The channel was boosted by the spread of smartphones and tablets as well as an increasing number of shopping apps in combination with improved payment methods. Convenience stores and forecourt retailers were another channel witnessing growing importance in many countries: they usually offer long opening hours, convenient locations and a modern shopping environment with air condition, Wi-Fi and dine-in foodservice as well as a relatively large product assortment.

Private label, the health and wellness segment paves the way

As a whole, private label accounts for 10% of global food and beverage sales in 2018, with a significantly lower ratio within beverages (5%) in comparison to packaged foods (12%). Major trends and developments are still determined by Europe, North America and Australasia, where private label is already well established. The highest private label sales can be found in Europe, where they account for 22% of overall food and beverage sales in 2018. Europe is followed closely by Australasia with 16% and North America with 14%. Asia Pacific, Middle East and North Africa, Latin America and Sub-Saharan Africa all register significantly lower shares of private label sales, with numbers between 2-3%. Private label often mimics the overall food and beverage market, but there are still some significant differences.

Confectionery, snacks & ready-to-eat products for example is the most important category within overall packaged food, accounting for 31% of sales, but only the second most important within private label alone, where the segment is projected to generate merely 20% of the overall sales value. Dairy, on the other hand, is performing very similar to the overall packaged food level, supported by high private label sales in Europe and North America. The category remains the most important segment of private label in 2018, accounting for 28% of food and beverages private label value sales on a global level. Within foods alone, the category accounts for 32%, a number very similar to the 29% value share in overall packaged foods. On both levels drinking milk products are witnessing the highest demand within dairy. Major differences can be found in cheeses, yoghurt and sour milk products. Even more mature is the meat and poultry market, especially in Europe.

Good growth is expected within the health and wellness segment. By offering organic, natural alternatives or more ethical products, retailers often manage to gradually shift consumer attitudes from loyalty to branded food products to loyalty to retailers' brands. Many discounters, supermarkets and hypermarkets have therefore introduced their own health and wellness private label portfolios.

end

AT FULL SOCIAL

ITALIAN GEOGRAPHICAL INDICATIONS ARE BOOMING ON THE WEB. OVER 100,000 USERS ARE REACHED EVERY DAY THROUGH THE NEW MEDIA AND MORE THAN 55% ARE LOCATED ABROAD. ABOUT 6,500 PUBLISHED CONTENTS. EXCELLENT RESULTS FOR FOOD, THAT WITH 28 MILLION USERS IN A YEAR OVERTAKES WINE (23 MILLION).

Easiness, speed, ability to develop content, inform and reach users on the other side of the world with just a few clicks. We are talking about social networks, which have now become a new, important promotional tool for Italian PDO and PGI Consortia. The Qualivita foundation, which published the first research on the world of GI (geographical indications) on the web, analyzes the online presence and digital activity of Italian PDOs and PGIs. An analysis that shows significant numbers for certified Italian agri-food and wine production. 6,500 contents are transmitted every day on blogs, forums, news sites, social networks all over the world, with over half of the conversations taken on abroad (55%), especially in the US (26%), and with more of 100,000 users involved daily. But even if we go beyond the numbers, the data remains positive. In terms of reputation, digital conversations with positive sentiment are fifteen times higher than those with negative sentiment (46% compared to 3% of the total allusions) with instagram that has become the privileged channel for food & wine. Among these two worlds, the food wins: with 28 million users involved in nine months, it overtakes wine (23 million users). The latter, however, shows a stronger presence of conversations abroad: only in the US, in almost 1,000 contents there are references to Italian wines with denomination of origin. The Qualivita Foundation study is the result of a research lasted nine months, during which both the ability of Italian PDO and PGI products to generate online conversations were investigated, as well as the set of web and digital marketing actions implemented by the Protection Consortia.

GI on the web: the numbers...

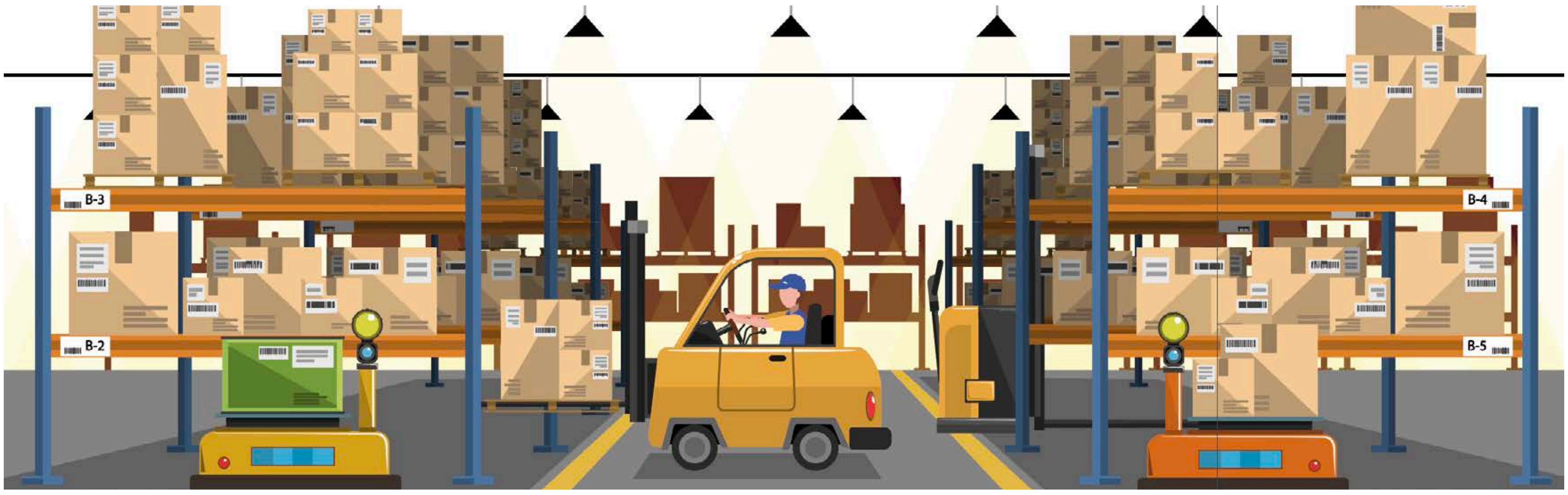
The report, the result of a monitoring on the network and a direct survey on the GI Protection Consortia of the food & wine world, provides data and information on the official web channels of Italian PDO and PGI, on developments in recent years and successful case histories as well as on digital investments by Consortia. And it clearly shows the boom registered on social media by promotional activities in the last two years, with a 63% growth of the Italian geographical indications that have launched at least one official account: 436 products in 2019 against 268 in 2017. In addition, 88% of Consortia has invested resources on social media, 86% on their website and 63% in digital marketing. The web is primarily seen as a global information channel, with digital actions also directed to the foreign target in 61% of cases. And it has gained such a significant role today that it is a stable voice in the Consortia budget, more and more aware that it is not for 'amateurs' but it requires investments: state support is clear in this sense, with almost half of the Consortia(46%) that benefited from public funding last year. And the prospects are developing, as shown by the deside displayed by 28% of Consortia to increase investmetns on the web starting from next year.

...and the words

The report also examines the contents of blogs, forums, news sites, thematic portals and numerous social network platforms around the world, to assess the presence and reputation of Italian PDOs and PGIs on the web. Digital conversations are characterized, first of all, by a rich and complex vocabulary that alongside the 'typical themes' of the GI - such as quality, tradition, and territory - use terms like tourism, culture, sustainability, environment, health. All themes that underline how made in Italy food and wine not only represent consumer goods, but are the vehicle of a wider value that supports the growth of the country and the affirmation of its reputation in the world. Thanks to 51 million users reached in nine months, with 1.8 million allusions referring to the major Italian GI carried by 968,000 authors on the web. More than half of the contents are directed abroad (55%), while in terms of sentiment the positive results are fifteen times higher than the negatives (46% against 3% of the mentions GI). Finally, in the nine months of the investigation, the allusions to PDOs and PGIs passed from 170,000 to 230,000, with an increase of 37%.

A tutto social

È boom per le indicazioni geografiche italiane sul web. Oltre 100mila gli utenti raggiunti ogni giorno attraverso i new media. Dei quali più del 55% all'estero. Circa 6.500 i contenuti pubblicati. Ottimi risultati per il food, che con 28 milioni di utenti coinvolti in un anno supera il wine (23 milioni).



FULL SPEED AHEAD!

INDUSTRY'S TURNOVER EXCEEDED 140 BILLION EURO IN 2018. PRODUCTION INCREASED BY 1.1%. AND EXPORTS ARE ALSO ON A RISING NOTE. THREE (AND MORE) REASONS WHY FOOD IS THE 'BRIGHT STAR' OF MADE IN ITALY.

That of food & beverage is one of our economy's flagship industries: in 2018, total production exceeded by 0.4% the results achieved in 2007 - the year before the onset of the economic crisis - posting a 1.1% increase. This may not seem such a big achievement until you compare it with total industrial production, which was down by 19.2% last year (compared to 2007).

After 12 years, the gap between food, on the one hand, and the rest of the world, on the other, still stands at 19.6 percentage points. Even if the food sector was not the most severely affected, during the years of crisis it also had to face a radical change in consumers' spending habits and the emergence of new, modern eating trends. Luigi Pelliccia, at the head of Federalimentare' research office, analyzed the major trends that have shaped the Italian food industry in 2018. And made some forecasts for what we can expect this year.

A 140 billion euro industry turnover

The national food industry's turnover reached 140 billion euro in 2018, up by 2% compared to the 137 billion euro registered in 2017. After a four-year period (2013-16) in which it remained steady at 132 billion euro. In December, the sector's turnover fell by 4.6% compared to December 2017. But the overall industrial turnover recorded a -7.3%. While industrial orders as a whole fell by -5.3%.

Export is driving growth

According to estimates, in 2018 exports in the food industry were worth 32.9 billion euros, with a 3% increase over previous year. Since 2007 - the last pre-crisis year - f&b exports have increased by 81%, against the +28.5% recorded by the overall industry. In detail, exports of protected geographical indications recorded a 145% increase. The incidence of exports on turnover stood at 23.5% last year, with a 10% increase over the 13% recorded at the beginning of the last decade. 2018 imports closed at around 21.8 billion euro, with a decrease of -1.2% over the previous year. The 2018 trade balance is therefore positive: 11.1 billion euro, up 12.1% over 2017 (9.9 billion).

Avanti Tutta!

Fatturato oltre i 140 miliardi di euro, nel 2018. Produzione industriale a +1,1%. Export in costante crescita. Ecco perché il comparto alimentare è la vera punta di diamante del made in Italy.

The outlook for 2019: 'caution' is the keyword

The domestic market scenario is not that rosy, according to analysts. The sharp slowdown registered in 2018 in GDP, that will continue for at least the first half of 2019, will not pull us out of this stagnation. The actions of the government, the uncertainties of the global political framework and a possible Brexit no deal scenario are elements that could further reduce consumptions. Food sales will remain anyway stable, with the low cost and, at the opposite, the premium ranges that will enjoy the most significant growth rates. With a further contraction of the medium price range. Total turnover will keep on growing, to reach 142 billion euro. Exports are expected to continue growing too, at around +3%.

THE ITALIAN FOOD INDUSTRY - MAIN FIGURES

(estimates in euro and % var. over previous year)

	2013	2014	2015	2016	2017	2018
REVENUE *(billion euro)*	132 (+1,5%)	132 (+0,0%)	132 (+0,0%)	132 (+0,0%)	137 (+3,8%)	140 (+2,2%)
PRODUCTION (*) *(volume)*	-0,7%	+0,6%	-0,6%	+1,1%	+1,7%	+1,1%
N. OF COMPANIES *(with over 9 employees)*	6.845	6.850	6.850	6.850	6.850	6.850
N. OF EMPLOYEES	385,000	385,000	385,000	385,000	385,000	385,000
EXPORT *(billion euro)*	26,2 (+6,1%)	27,1 (+3,5%)	29,0 (+6,7%)	30,0 (+3,6%)	31,9 (+6,3%)	32,9 (+3,0%)
IMPORT *(billion euro)*	19,5 (+4,8%)	20,4 (+4,8%)	20,8 (+2,0%)	20,7 (-0,3%)	22,1 (+6,0%)	21,8 (-1,2%)
TRADE BALANCE *(billion euro)*	6,7 (+9,8%)	6,8 (+0,0%)	8,2 (+20,6%)	9,3 (+13,4%)	9,9 (+7,0%)	11,1 (+12,1%)
FOOD CONSUMPTION *(billion euro)*	225	227	233	236	240	242
PLACEMENT AMONG THE ITALIAN MANUFACTURING INDUSTRY *(after mechanical eingeneering)*	2° place (13%)	2° place (13%)	2° place (13%)	2° place (13%)	2° place (13%)	2° place (13%)

Federalimentare's elaborations on Istat data. Variations are calculated on effective and complete data and therefore they don't always coincide with those calculated on approximate data. (*) equal number of working days.

Source: Federalimentare elaboration on Istat data

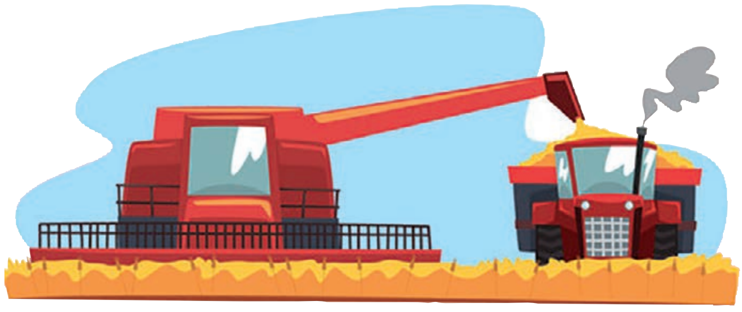
<u>**FOOD INDUSTRY PRODUCTION AND TOTAL PRODUCTION 2000-2018 EVOLUTION**</u>

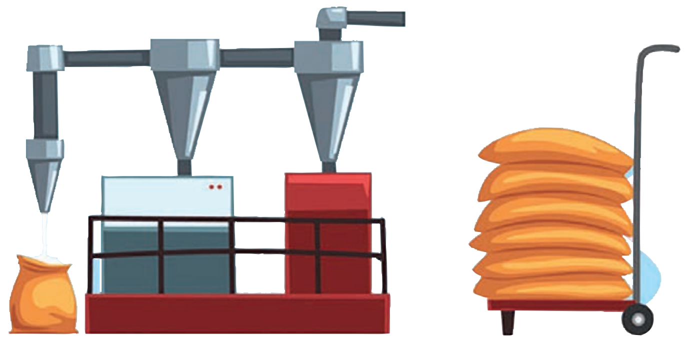
(Index numbers 2000 = 100)

Var. % 2000-2018
Food Ind. = 12.8%
Tot. Ind. = -17.7%
Differential 2000-2018 = 30.5 points
Var. % crisis period 2007-2018
Food Ind. = +0.4%
Tot. Industry = -19.2%
Differential 2007-2018 = 19.6 punti

Years	Food Ind. Raw indexes (yearly average)	Food Ind. Var.% over previous year	Tot. Ind. Raw indexes (yearly average)	Tot. Ind. Var.% over previous year
2001	103,8	3,8	99,1	-0,9
2002	105,3	1,4	97,9	-1,2
2003	107,5	2,1	96,8	-1,1
2004	108,5	0,9	97,7	0,9
2005	109,8	1,2	96,0	-1,7
2006	111,6	1,6	99,0	3,1
2007	112,4	0,7	101,8	2,8
2008	111,8	-0,6	98,5	-3,2
2009	110,1	-1,5	80,2	-18,6
2010	112,3	2,0	85,4	6,5
2011	110,2	-1,9	85,7	0,3
2012	109,5	-0,6	80,4	-6,2
2013	108,6	-0,8	78,0	-3,0
2014	108,6	0,0	77,1	-1,2
2015	108,7	0,1	78,3	1,6
2016	109,6	0,8	79,2	1,2
2017	110,8	1,1	81,1	2,4
2018	112,8	1,8	82,3	1,5

Source: Federalimentare elaboration on Istat data





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THE ANALYSIS

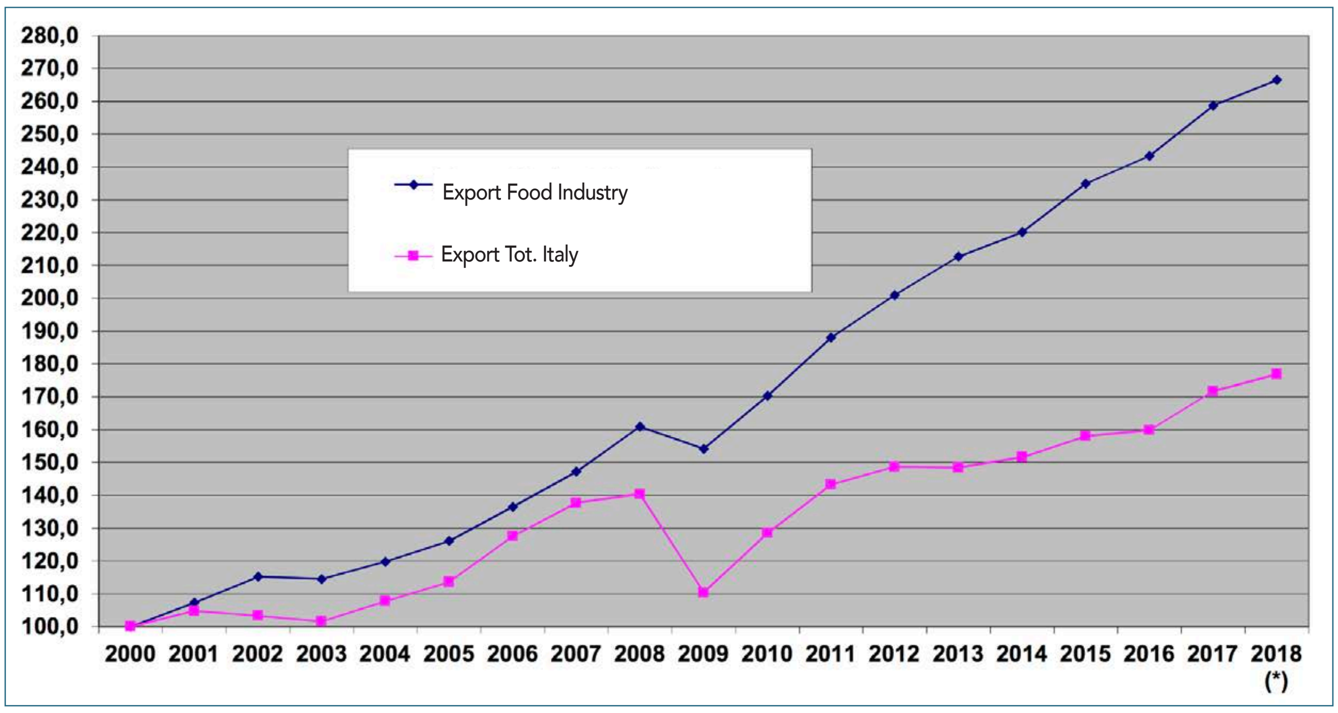
FOOD INDUSTRY EXPORT AND TOT. INDUSTRY EXPORT (2000-2018)

(Index numbers 2000 = 100)

Var. % 2000-2018
Food Ind. = +166.5%
Tot. Industry = +76.9%
Differential 2000-2018 = 89,6
Var. % crisis period 2007-2018
Food Ind. = +81.0%
Tot. Industry = +28.5%
Differential 2007-2018 = 52,5

Years	Food industry	Tot. Italy
2000	100,0	100,0
2001	107,3	104,8
2002	115,2	103,3
2003	114,5	101,6
2004	119,8	107,8
2005	126,1	113,6
2006	136,5	127,5
2007	147,2	137,7
2008	160,9	140,4
2009	154,2	110,4
2010	170,3	128,5
2011	188,0	143,3
2012	201,0	148,7
2013	212,7	148,4
2014	220,2	151,7
2015	234,9	158,0
2016	243,4	159,9
2017	258,7	171,7
2018 (*)	266,5	176,9

(*) estimates. Source: Federalimentare's elaboration on Istat data



(*) estimates. Source: Federalimentare's elaboration on Istat data

'ITALIAN SOUNDING' IN THE FOOD INDUSTRY

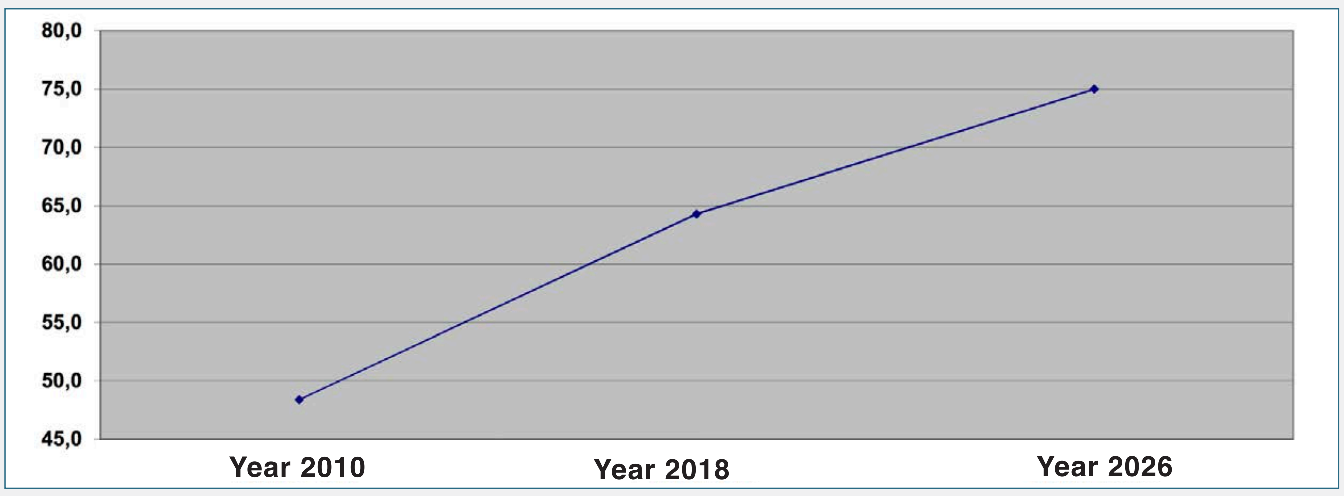
Final results and forecasts (estimates in bln euro)

Italian Sounding (2010)	Revenue (2010)	Inc. % Italian Sounding/ Revenue (2010)	Italian Sounding (2018)	Revenue (2018)	Inc. % Italian Sounding/ Revenue (2018)	Italian Sounding (2026)	Revenue (2026)	Inc. % Italian Sounding/ Revenue (2026)
60	**124**	**48,4**	**90**	**140**	**64,3**	**120**	**160**	**75,0**

Source: Federalimentare's Ufficio Studi

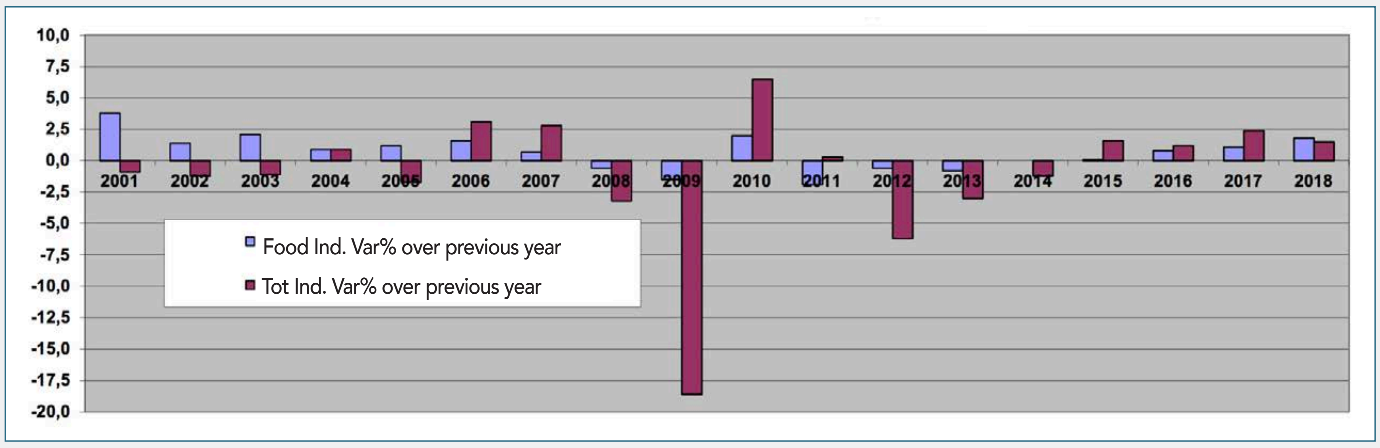
THE INCIDENCE OF ITALIAN SOUNDING (%) ON THE FOOD INDUSTRY REVENUE

Year 2010: 48,4 **Year 2018: 64,3** **Year 2026: 75,0**



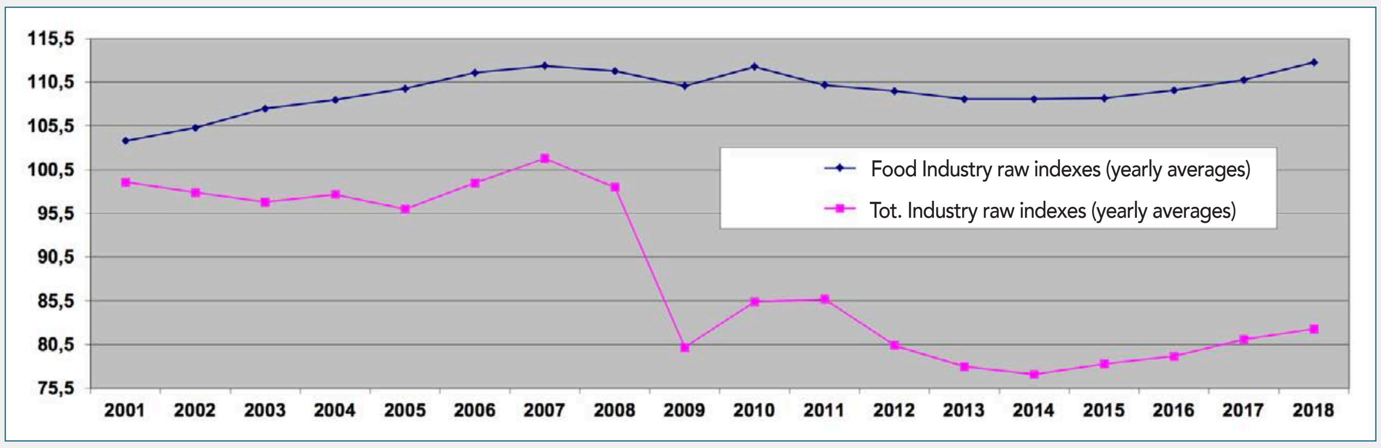
Source: Federalimentare's Ufficio Studi

FOOD INDUSTRY PRODUCTION AND TOTAL INDUSTRY - VAR % OVER PREVIOUS YEAR



Source: Federalimentare elaboration on Istat data

FOOD INDUSTRY PRODUCTION AND TOTAL INDUSTRY - YEARLY INDEXES



Source: Federalimentare elaboration on Istat data

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EXPORT OF ITALY: A SLOW DEVELOPMENT

DATA FROM THE WINE OBSERVATORY SHOW A 3.3% VALUE INCREASE, AND AN 8% VOLUME DECREASE. THE 6 BILLION EURO THRESHOLD HAS BEEN EXCEEDED FOR THE SECOND CONSECUTIVE YEAR.

Volumes have gone down, but the business has increased in value. And for the second consecutive year, the export of Italian wine has gone above the 6 billion euro threshold. This is the photograph that emerges from the analysis compiled by the Wine Observatory for year 2018 for the made in Italy products by validating the estimates released in the last months. The general picture - outlined by Ismea, a partner of the Observatory, and Unione Italiana Vini - basically confirms the concerns regarding the slowdown in exports of the wine sector.

As a matter of fact, as was said at the beginning, on the one hand there is a growth in value and the overcoming of the threshold of 6 billion euros (6.2 billion euros, to be precise) for the second consecutive year. A positive figure, which certainly proves how Italian wine is on the right path for a better esteem of products. On the other hand, however, it should be noted that - in a world scenario characterized by relatively stable consumption - the 'Italian System' is not able to speed-up in terms of competitiveness: therefore it produces a growth that can be defined as slow.

But let's take a closer look at the numbers of the business that characterized 2018 on the export side.

LEADING DESTINATION COUNTRIES FOR ITALIAN WINES AND MUSTS

	Hectolitres			Thousand euro		
	2017	2018	Var.%	2017	2018	Var.%
Usa	3.343.602	3.392.294	1,5%	1.406.573	1.462.819	4,0%
Germany	5.682.444	5.116.736	-10,0%	997.427	1.037.607	4,0%
UK	3.080.526	2.902.506	-5,8%	812.205	827.463	1,9%
Switzerland	756.744	708.005	-6,4%	359.427	376.793	4,8%
Canada	796.169	771.077	-3,2%	332.879	333.776	0,3%
France	1.051.323	847.947	-19,3%	170.043	187.218	10,1%
Sweden	525.509	534.853	1,8%	164.913	177.320	7,5%
Japan	441.773	407.051	-7,9%	162.552	161.347	-0,7%
Netherlands	435.608	440.113	1,0%	142.150	150.102	5,6%
Denmark	394.029	374.336	-5,0%	148.213	139.510	-5,9%
China	377.052	331.879	-12,0%	130.000	126.918	-2,4%
Belgium	345.931	348.371	0,7%	123.348	121.286	-1,7%
Russia	478.121	419.434	-12,3%	111.260	108.589	-2,4%
Austria	488.442	383.318	-21,5%	102.321	103.028	0,7%
Norway	231.891	227.613	-1,8%	94.045	93.829	-0,2%
Poland	215.406	209.493	-2,7%	50.223	61.940	23,3%
Australia	114.749	138.631	20,8%	52.128	61.774	18,5%
Czech Republic	350.426	218.903	-37,5%	45.735	43.954	-3,9%
Spain	219.197	206.294	-5,9%	40.014	43.851	9,6%
Finland	90.638	94.508	4,3%	34.509	37.769	9,4%
Mexico	130.351	138.043	5,9%	33.382	35.827	7,3%
Brazil	147.704	116.731	-21,0%	38.838	35.282	-9,2%
Others	1.779.346	1.451.973	-18,4%	452.924	475.687	5,0%
World	**21.476.979**	**19.780.108**	**-7,9%**	**6.005.110**	**6.203.688**	**3,3%**

ITALIAN EXPORTS OF WINES AND MUSTS BY GEOGRAPHICAL AREA

	Hectolitres			Thousand euro		
	2017	2018	Var.%	2017	2018	Var.%
Total	21.476.979	19.780.108	-7,9%	6.005.110	6.203.688	3,3%
EXTRA-EU	7.371.862	7.233.396	-1,9%	2.957.716	3.057.575	3,4%
EU	14.105.117	12.546.712	-11,0%	3.047.393	3.146.113	3,2%

ITALIAN EXPORTS OF SPARKLING WINES

	Hectolitres			Thousand euro		
	2017	2018	Var.%	2017	2018	Var.%
PDO	**2.963.799**	**3.117.270**	**5,2%**	**1.175.425**	**1.302.013**	**10,8%**
Prosecco	2.049.555	2.248.354	9,7%	804.084	923.700	14,9%
Asti	384.122	415.389	8,1%	127.861	143.477	12,2%
Champagne	7.164	8.927	24,6%	21.288	34.391	61,6%
Cava	5.739	2.604	-54,6%	2.140	1.262	-41,0%
Other PDO wines	517.219	441.997	420,2%	220.053	199.184	410,3%
PGI	**113.266**	**96.896 -**	**14,5%**	**26.576**	**24.278**	**-8,6%**
Varietals	106.228	118.730	11,8%	32.522	40.498	24,5%
Common	485.647	543.635	11,9%	126.529	146.506	15,8%
Sparkling	**3.668.940**	**3.876.532**	**5,7%**	**1.361.053**	**1.513.295**	**11,2%**

Source: Ismea elaborations on Istat data

EXPORTS OF SPARKLING WINES: LEADING DESTINATION COUNTRIES

	Hectolitres			Thousand euro		
	2017	2018	Var.%	2017	2018	Var.%
UK	1.168.664	1.166.414	-0,2%	409.746	434.559	6,1%
Usa	722.259	787.051	9,0%	296.100	333.654	12,7%
Germany	263.221	337.956	28,4%	96.992	102.214	5,4%
Switzerland	111.125	115.470	3,9%	54.418	60.075	10,4%
France	170.343	132.765	-22,1%	45.424	53.507	17,8%
Russia	125.533	149.889	19,4%	38.520	47.798	24,1%
Belgium	96.445	119.180	23,6%	39.614	45.931	15,9%
Sweden	87.714	109.688	25,1%	33.137	42.178	27,3%
Canada	67.286	74.559	10,8%	32.558	36.400	11,8%
Japan	69.789	68.470	-1,9%	29.896	33.558	12,2%
Australia	48.322	62.704	29,8%	21.266	27.480	29,2%
Austria	58.412	55.074	-5,7%	24.324	26.591	9,3%
Latvia	55.514	55.162	-0,6%	19.252	21.016	9,2%
Poland	48.119	56.582	17,6%	15.874	20.877	31,5%
Netherlands	31.036	27.288	-12,1%	16.941	17.944	5,9%
Spain	72.552	71.654	-1,2%	12.819	16.241	26,7%
Norway	32.575	32.591	0,0%	14.998	15.584	3,9%
China	46.709	40.410	-13,5%	15.227	13.459	-11,6%
Denmark	25.549	27.067	5,9%	10.505	11.272	7,3%
Finland	19.764	23.463	18,7%	7.952	9.790	23,1%
Estonia	15.902	25.038	57,4%	6.323	8.981	42,0%
Czech Republic	15.963	20.571	28,9%	5.854	8.250	40,9%
Others	316.144	317.485	0,4%	113.312	125.936	11,1%
World	**3.668.940**	**3.876.532**	**5,7%**	**1.361.053**	**1.513.295**	**11,2%**

Source: Ismea elaborations on Istat data

Export d'Italia: una crescita rallentata

Calano i volumi (-8%), ma aumenta il business a valore (+3,3%). E per il secondo anno consecutivo l'export di vino italiano va al di sopra della soglia dei 6 miliardi di euro. Questa la fotografia che emerge dall'analisi stilata dall'Osservatorio del Vino relativamente all'anno 2018 per il prodotto made in Italy.

Italian wine grew by 3.3% in value in 2018, and reached 6.2 billion euros, while in volume, due to the low harvest in 2017 and a rather weak demand on the markets, it fell below the threshold of 20 million hectoliters (19.8 million hl), equal to about 8% less than the previous year.

The sparkling wine sector was once again the driving force behind the industry, with a robust 11.2% growth in value (over 1.5 billion euros) and an increase close to 6% in volume (almost 3.9 million hectoliters). With Prosecco we achieved an increase of 15% in value and 10% in volume. On the other hand, the semi-sparkling wines remained stable in volume, recovering discreetly on the value component (+7%), thanks to the dynamism of the German market (+3% in volume and +12% in value), first importer for this type of products.

Exports of still wines fell by 5% in volume (9.7 million hectoliters) and their value remained stable instead, confirming the 3.8 billion euro in 2017, with a 5% progression on prices average per liter (3.81 euros per liter). With the entry of Pinot Grigio delle Venezie on the markets is not possible to make a comparison with last year's PDO and PGI wines, however the PGI recorded a settlement in volume of around 14.6 million hectoliters (-3%) and an increase of 3% in value.

With regards to still bottled wines, after analyzing the individual countries in detail, a stalemate of exports to the United States has been registered (a slight decreas of approximately 1% in volume) and a slight increase of 1.4%, while in the United Kingdom the decrease was more consistent: -8% in volume and -1% in value. All in all, from a general point of view, results achieved in Germany were positive.

In conclusion, this is a remakable fact as a whole. But, as it has been pointed out by more sides, export represents about half of the total turnover of the sector. Therefore, it constitutes a decisive and crucial business opportunity for development. And as such it must be supported and enhanced in a more incisive and effective way. Competitiveness is getting tougher and the winning key is that of making a 'system' in an organic and structured way.

Raffaella Cordera

VISIT US AT TUTTOWINE FIERA MILANO, 6-9 MAY

WINE

CANTINE LEONARDO DA VINCI
www.leonardodavinci.it

2016 Villa Da Vinci 'S.to Ippolito' Toscana IGT

GRAPES (%)
Sangiovese 40%, Merlot 30%, Syrah 40%.
LAND OF PRODUCTION
The hillside of Vinci, Tuscany.
ORGANOLEPTIC CHARACTERISTICS
From the careful selection of the best grapes grown and harvested in the winery's own vineyards comes a blend of Sangiovese, Merlot and Syrah that merges to produce an outstanding harmonious wine that combines the highest qualities of thickness, balance and aroma integrity of each grape variety in the blend.
N. OF BOTTLES PRODUCED
26,000
SIZES
0,75 lt.

CODICE CITRA
www.citra.it

Ferzo Montepulciano D'Abruzzo DOP Sottozona Teate

GRAPES (%)
Montepulciano (autochthonous vine).
LAND OF PRODUCTION
Hills in the province of Chieti, Abruzzo.
ORGANOLEPTIC CHARACTERISTICS
Colour: intense ruby red with light purple highlights. Bouquet: intense red fruits aroma: black cherry, fig and plum with spicy hints, black pepper and cinnamon. Taste: full body well balanced in accordance with the typical characteristics of the Montepulciano wine, tannin-rich, but soft and juicy, fruit preserve nuances, with a complex and lingering finish.
SIZES
0,75 lt

FRESCOBALDI
www.frescobaldi.it

CastelGiocondo Brunello di Montalcino DOCG 2014

GRAPES (%)
Sangiovese.
LAND OF PRODUCTION
Tuscany.
ORGANOLEPTIC CHARACTERISTICS
Bright, rich, ruby-red hue. On the nose, fruity notes dominate, ranging from raspberry to blackcurrant, with vague hints of blueberry. Elegant floral notes then emerge, offering striking and surprising scents of violet. Spicy tertiary notes are then released, due to the lengthy ageing process. Cinnamon, pepper and leather combine in an experience of extreme elegance, finishing on a balsamic note. The wine impresses with its balance, dense tannic texture and minerality, as well as its long, persistent finish.
N. OF BOTTLES PRODUCED
190,000
SIZES
0,375 - 0,75 - 1,5 - 3 lt

MARCHESI DI BAROLO
www.marchesibarolo.com

Barolo DOCG Cannubi 2014

GRAPES (%)
Nebbiolo 100%.
LAND OF PRODUCTION
Piedmont.
ORGANOLEPTIC CHARACTERISTICS
This wine is garnet-red in color with ruby reflections. Its intense nose has distinct traces of roses, vanilla, licorice, spices, toasted oak and a gentle scent of absinth. The flavor is full and elegant, good-bodied and austere with remarkably elegant tannins. The spicy personality and the hints of wood blend perfectly.
N. OF BOTTLES PRODUCED
26,000
SIZES
0,75 - 1,5 lt

MEZZACORONA
www.mezzacorona.it

Mezzacorona Pinot Grigio Trentino Doc

GRAPES (%)
Pinot Grigio 100%.
LAND OF PRODUCTION
Trentino.
ORGANOLEPTIC CHARACTERISTICS
A delicately complex wine with an intense fragrance, it is dry with a pleasant slightly bitter after taste.
N. OF BOTTLES PRODUCED
N/A
SIZES
0,75 lt

TERRE CEVICO GROUP
www.gruppocevico.com/en

'b.io' Catarratto Chardonnay Terre Siciliane IGT

GRAPES (%)
Catarratto, Chardonnay.
LAND OF PRODUCTION
Inland southwestern vineyards of Sicily.
ORGANOLEPTIC CHARACTERISTICS
Deep golden colour with green glints. Fresh, mineral nose with notes of citrus fruits and linden. Moderate structure, fresh acidity and a markedly fruity aftertaste.
N. OF BOTTLES PRODUCED
238.458
SIZES
0,75 lt

TERRE D'OLTREPÒ
www.terredoltrepo.it

'Clefi' Oltrepò Pavese DOC vintage 2017

GRAPES (%)
Riesling Renano 100%
LAND OF PRODUCTION
Oltrepò Pavese.
ORGANOLEPTIC CHARACTERISTICS
Ochre yellow color with amber reflections. Characteristic and pleasant scent. In mouth it is fresh and intense.
N. OF BOTTLES PRODUCED
10,000
SIZES
0,75 lt

ZONIN
www.zonin.it

Zonin Amarone della Valpolicella DOCG

GRAPES (%)
Corvina, Rondinella, Molinara.
LAND OF PRODUCTION
Valpolicella.
ORGANOLEPTIC CHARACTERISTICS
Colour: garnet-red with brilliant ruby reflections. Bouquet: broad and nuanced, with scents of wild berries. Flavour: majestic and velvety, with richly fruity dried grape tones.
N. OF BOTTLES PRODUCED
N/A
SIZES
0,75 lt


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ALLEVIAMO
RISPETTIAMO
GARANTIAMO
SCOPRI I NOSTRI ALLEVATORI