SPECIAL EDITION

Summer FANCY FOOD SHOW

Editore: Edizioni Turbo Srl - Corso della Resistenza, 23 - 20821 Meda (MB) - Tel. +39 0362 600463/4 Fax. +39.0362.600616 - Periodico bimestrale - Registrazione al Tribunale di Milano n. 38 del 25 febbraio 2015
Stampa: Ingraph - Seregno (MB) - Poste Italiane Spa - Sped. in Abbonamento Postale DL 353/2003 (conv. in L. 27.02.2004, n.46) art. 1, comma 1, LO/MI - In caso di mancato recapito, inviare all'ufficio postale di Roserio per la restituzione al mittente che si impegna a pagare la relativa tariffa.

In partnership with ITA ITALIAN TRADE AGENCY ICE - AGENZIA

THE ITALIAN FOOD MAGAZINE

BUYER'S • GUIDE

YEAR 7 - N° 6 • JUNE 2019
MANAGING DIRECTOR: ANGELO FRIGERIO

SPECIAL EDITION

Summer FANCY FOOD SHOW

JOIN NEW YORK'S BIGGEST SPECIALTY FOOD SHOW

A PREVIEW
OF THE PRODUCTS
THAT WILL BE PRESENTED
DURING THE TRADE SHOW
BY ITALIAN EXHIBITORS.

EDITORIAL

by Angelo Frigerio, managing director

HOW AND WHY AUCHAN ITALIA GOES TO CONAD

The operation that almost brought the entire Auchan Italia as a dowry to Conad is a true masterpiece of financial engineering. The Pugliese/Mincione axis (respectively the Ceo of the Italian company and the financier who is going to buy Auchan's properties) worked properly. Basically, all the Auchan stores and franchises will be taken over by Conad, except for the Sicilian stores and a few more. According to knowledgeable sources, the transaction is worth about one billion euros. So Conad overtakes Coop and becomes the first Italian chain in terms of global turnover.

Let's be clear: the withdrawal of Auchan is not caused by "the problems that the foreign countries have to face in Italy", as said by a journalist. The French company pays for its arrogance, for the lack of strategy and for the many mistakes they made.

Just to make an example, at the beginning they invaded their shelves with French products. This model of food colonization lasted just a few months. The French noticed it and fell back, choosing products which were properly Italian.

Another example is the building and management strategy for hypermarkets. The French company made a huge own goal on the Milan-Monza axis: two megastructures very close to each other. What's left of the hypermarket Auchan in Cinisello Balsamo? A mournfully empty concrete eco-monster left in a run-down condition. In other words, the two shopping centres stole the clients from each other. Now even the one in Monza is facing troubles and I don't think it will last long.

Basically, as explained by Edgar Bonte, president of Auchan Retail, in a video recorded for the employees, they had no better choice than selling. The company had been losing money since 2011 and it wasn't possible to continue that way.

Unfortunately, the operation didn't cause the expected media frenzy. The Italian press seemed, and still seems, much more interested in the brawls between Salvini and Di Maio than in such a key issue for our economic system. However, this is a sea change in the structure of modern Italian distribution. With consequences that we will surely see in short- and medium-term.

On the one hand, this will affect the employment. More than one people in the headquarters wonder about their future. There will surely be a revolution among the chain buyers.

On the other hand, it will affect the employees. As well as franchise stores. Some painful cuts are expected to be made but Conad's philosophy make us hope in limited and surgical actions. Also because the slogan of its spots, in Italy, have been for years: "People beyond things".

AUCHAN ITALIA A CONAD: COME E PERCHÉ

L'operazione che ha portato in dote a Conad quasi tutta Auchan Italia è stata un capolavoro di ingegneria finanziaria. L'asse Pugliese (amministratore delegato della catena italiana)/Mincione (il finanziere che acquisterà la parte immobiliare di Auchan) ha funzionato a dovere. In pratica tutti i punti vendita della catena e i negozi in franchising – tranne quelli siciliani e poco altro ancora – passeranno a Conad. Un affare che vale, secondo fonti solitamente bene informate, circa un miliardo di euro. Così Conad sorpassa Coop e diventa la prima catena italiana come fatturato globale.

Parliamoci chiaro: la ritirata di Auchan non è dovuta "alle problematiche che incontrano le aziende estere sul territorio italiano", come ha scritto un giornalista. I francesi pagano l'arroganza, una mancanza di strategia e numerosi errori di percorso.

All'inizio, tanto per fare un esempio, invasero le loro corsie di prodotti transalpini. Un modello di colonizzazione agroalimentare che durò lo spazio di pochi mesi. I francesi si accorsero e ripiegarono su prodotti italiani, anzi italianissimi.

Altro esempio è la strategia di costruzione e gestione degli ipermercati. Clamoroso l'autogol sull'asse Milano Monza: ben due megastrutture a breve distanza l'una dall'altra. Cosa rimane, a Cinisello Balsamo dell'iper Auchan? Un ecomostro di cemento desolatamente vuoto e in stato di abbandono. In pratica i due centri commerciali vicini si sono rubati i clienti a vicenda. Oggi anche quello di Monza soffre e non credo possa avere vita lunga.

In pratica, come ha sottolineato Edgar Bonte, presidente di Auchan Retail, in un video rivolto ai dipendenti, non c'erano altre scelte se non vendere. La catena perdeva soldi dal 2011 e non si poteva più andare avanti così. Purtroppo l'operazione non ha avuto quel clamore mediatico che ci si aspettava. La stampa italiana è sembrata, e sembra, più interessata alle baruffe fra Salvini e Di Maio che non alle questioni fondamentali per l'economia del nostro paese. Al contrario si tratta di un cambiamento epocale nella struttura della distribuzione moderna italiana. Con conseguenze che si vedranno sicuramente a breve e medio termine.

In primis a livello occupazionale. Nella sede centrale di Auchan più d'uno si sta interrogando sul proprio futuro. Sicuramente ci sarà una rivoluzione fra i buyer della catena.

Altra cosa saranno i dipendenti. Come pure i negozi in franchising. Qualche doloroso taglio è previsto ma la filosofia Conad e la sua storia fanno sperare in riduzioni contenute e chirurgiche. Anche perché il pay off dei suoi spot è da anni: "Persone oltre le cose".

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

INSIDE

THE ITALIAN FOOD MAGAZINE BUYER'S · GUIDE

THE ITALIAN FOOD MAGAZINE

Managing director: ANGELO FRIGERIO
Editorial director: RICCARDO COLLETTI
Edited by: Edizioni Turbo Srl - Palazzo di Vetro
Corso della Resistenza, 23 - 20821 - Meda (MB)
Tel. +39 0362 600463/4/5/9
Fax. +39 0362 600616 - e-mail: info@tespi.net
Anno 7 - numero 6 - giugno 2019

Periodico bimestrale - Registrazione al Tribunale di Milano n. 38 del 25 febbraio 2015 - Stampa: Ingraph - Seregno (MB) -

Poste Italiane Spa - Sped. in Abbonamento Postale DL 353/2003 (conv. in L. 27.02.2004, n.46) art. 1, comma 1, LO/MI

Una copia 1,00 euro - Abbonamento annuo 20,00 euro
L'editore garantisce la massima riservatezza dei dati personali in suo possesso. Tali dati saranno utilizzati per la gestione degli abbonamenti e per l'invio di informazioni commerciali. In base all'Art. 13 della Legge n° 196/2003, i dati potranno essere rettificati o cancellati in qualsiasi momento scrivendo a: Edizioni Turbo S.r.l.

Responsabile dati: Riccardo Colletti
Corso della Resistenza, 23 - 20821 Meda (MB)

NEWS

AMAZON-ITA AGREEMENT TO INTERNAZIONALIZE AROUND 600 SMES

Amazon and the Italian Trade Agency signed an agreement to support Italian small and medium enterprises aiming at expanding in strategic foreign markets such as the UK, France, Germany and the USA. According to the agreement, 600 new companies and their products (over 12,000) will be included in the Amazon store devoted to made in Italy products. "E-commerce remains a great opportunity for Italian small and medium enterprises", stated Mariangela Marseglia, Amazon.it and Amazon.es country manager. "Thanks to this understanding with the ITA and to the constant investments on machineries and infrastructures for SMEs, for these companies, selling to millions of customers worldwide will be as easy as selling in their home-country". As for ITA, it contributes investing over 2 million euros. "This agreement is the first step to close the gap to access online export for Italian SMEs", pinpointed Carlo Ferro, President of ITA.

Accordo Amazon-Ice
per l'internazionalizzazione di circa 600 Pmi

Siglato un accordo di collaborazione tra Amazon e l'Ice Agenzia volto a sostenere le piccole e medie imprese italiane che desiderano raggiungere mercati esteri strategici quali Regno Unito, Francia, Germania e Stati Uniti. L'intesa prevede infatti l'inserimento di circa 600 nuove aziende e dei rispettivi prodotti (oltre 12mila) nella vetrina di Amazon dedicata al made in Italy. "L'e-commerce continua a essere una grande opportunità per le piccole e medie imprese italiane", commenta Mariangela Marseglia, country manager di Amazon.it e Amazon.es. "Attraverso questa intesa con l'Agenzia Ice e i continui investimenti in strumenti e infrastrutture per le Pmi, queste aziende saranno in grado di vendere a milioni di clienti nel mondo tanto facilmente quanto vendere nel proprio Paese". L'Ice, dal canto suo, mette sul piatto investimenti per oltre 2 milioni di euro. "Questo accordo è un primo step nella direzione di ridurre il gap di accesso all'export on-line per le Pmi italiane", sottolinea il presidente dell'Ice, Carlo Ferro.

COMPLETELY TRACEABLE TRAYS FOR SLICED SAN DANIELE PDO HAM

The Consortium for the protection of Prosciutto San Daniele PDO has started a traceability project on the raw ham chain. The initiative was carried out in collaboration with Ifcq Certificazioni and by means of the software created by Beantech from Udine and is a first step towards a blockchain certification of the Italian pork chain for PDO hams. The system has two goals. On the one hand, it allows workers of the sector to access all the documents on the PDO through the website portale.prosciuttosandaniele.it. On the other, by scanning the QR code on the bowls of sliced ham, consumers can visit a devoted page on the website www.ilsandanieletrasparente.it, where they will find information on the slicing date, ingredients, producers' details, etc. 16 slicing lines are currently involved in the project, and Industry 4.0 machineries were bought to start them. With the collaboration of the Consortium, since 2016, over 600,000 euros were invested.

Tracciabilità univoca delle vaschette
di preaffettato per il San Daniele Dop

Il Consorzio del prosciutto di San Daniele Dop avvia un progetto di tracciabilità sulla filiera del prosciutto crudo. L'iniziativa, portata avanti in collaborazione con Ifcq Certificazioni e con il software realizzato dalla Beantech di Udine, costituisce un primo passo verso una certificazione blockchain della filiera italiana dei suini per i prosciutti Dop. Il sistema ha una duplice valenza: da un lato, consente agli operatori l'accesso esclusivo a tutta la documentazione relativa alla Dop tramite il sito web portale.prosciuttosandaniele.it. Dall'altro, tramite lettura di un codice Qr stampato sulle vaschette di prosciutto affettato, il consumatore approda su un'apposita pagina web del sito www.ilsandanieletrasparente.it, dove troverà informazioni relative a data di affettamento, ingredienti, dettagli sui produttori, ecc. Ad oggi, sono 16 le linee di affettamento coinvolte nel programma e per la cui messa a regime è stato necessario l'acquisto di macchinari tipici dell'Industry 4.0. Con la collaborazione del consorzio, il valore complessivo dell'investimento, iniziato nel 2016, supera i 600mila euro.

A EU JUDGMENT DEFINES AS A "MISLEADING PRACTICE" USING IMAGES EVOKING PDO AND PGI PRODUCTS

"Symbols and images referring to the origin of a PDO food product can evoke illegally the brand", this is what the European Court of Justice stated in its judgment on the case opposing Queso Manchego PDO producers and a company that used symbols attributable to the Mancha region in the packaging of a non-PDO product. In particular, despite this company produced PDO products as well, it used their image for selling a similar cheese with no Protected Designation of Origin. "It is a sentence of great importance", declared the President of Origin Italia, Nicola Cesare Baldrighi, "it will boost further PDO and PGI productions allowing to defend the most common and widespread products from imitations". Riccardo Ricci Cubastro, President of Federdoc, continued: "The PDO economy accounts for over 20% of the value of the Italian agro-food industry, proving to be the real mover of the cultural and production heritage enhancement in many Italian regions".

Sentenza Ue definisce "pratica ingannevole" l'evocazione dei prodotti Dop e Igp

"Simboli e immagini che facciano riferimento all'origine di un prodotto alimentare Dop possono costituire un'illegale evocazione del marchio", è quanto stabilisce la sentenza della Corte di giustizia europea in merito al caso che vedeva contrapposti i produttori del formaggio spagnolo Queso Manchego Dop e una società che utilizzava simboli riconducibili al territorio della Mancha nel packaging di un prodotto non Dop. Nel caso specifico, nonostante la società producesse anche il prodotto Dop, sfruttava l'immagine di quest'ultimo affiancandola alla vendita di un formaggio similare ma non a marchio Dop. "Una sentenza di grande rilievo", dichiara il presidente di Origin Italia Nicola Cesare Baldrighi, "che darà ulteriore slancio alle produzioni Dop e Igp consentendo ai prodotti più diffusi e conosciuti di meglio difendersi dalle imitazioni". Gli fa eco Riccardo Ricci Cubastro, presidente di Federdoc, che commenta: "La Dop economy ha ormai superato il 20% del valore dell'agroalimentare italiano, dimostrando di essere il vero motore della valorizzazione del patrimonio produttivo e culturale di tanti territori italiani".

STERILGARDA PRESENTS ITS 'UHT RICOTTA'

The Manutua-based company (Lombardy), specialized producer of milk and its derivatives, as well as fresh spreadable cheeses, fruit juices and drinks, presents its 'Uht Ricotta'. A typical Italian product and an excellent ingredient for tortellini, cheese cakes and other dishes, now available in the new Uht version. Free from preservatives, Ricotta Sterilgarda is sold in 500 ml Tetrabrick cartons.

Sterilgarda presenta la 'Ricotta Uht'

L'azienda mantovana, specialista nella produzione di latte e derivati, ma anche formaggi freschi spalmabili, succhi di frutta e bevande, presente la sua 'Ricotta Uht'. Un prodotto tipico prodotto italiano, nonché un ingrediente indispensabile per realizzare deliziosi ripieni di primi piatti, di secondi farciti e di delicati dolci, da oggi disponibile nella nuova versione Uht. Un prodotto privo di conservanti, venduto in confezione Tetrabrik da 500 ml.

THE BEST-SELLING MADE IN ITALY PRODUCTS WORLWIDE

Chocolate, tea, coffee, spices and ready-made food are the most exported made in Italy products in the world accounting for 7 billion euros, a 3.6% increase. The list was drawn up following a survey by the Chamber of Commerce Milan, Monza Brianza, Lodi. Wines rank second (6.2 billion, +3.3%), followed by bread, pasta and starchy food (3.9 billion euros, +2.5%). Fruit (+2.4%), dairy products (+3.2%), meats and unprocessed products from permanent crops, including grapes and citrus fruits, are worth over 3 billion euros too. Bread and pastry products recorded the best performances, +72% with 1.2 billion; followed by pets products (+10.5%), and ice-creams (+7.4%). As a whole, the Italian agro-food industry is worth 41 billion euros worldwide, up by 1.4%, and the main importers are Germany (+1.6%), France (+4.3%), the United States (+4%), the United Kingdom (+1.6%).

I prodotti made in Italy più esportati al mondo

Cioccolato, tè, caffè, spezie e piatti pronti sono i prodotti made in Italy più esportati nel mondo. Per un valore di 7 miliardi di euro, in crescita del 3,6%. La classifica, stilata in base ai dati di uno studio della Camera di commercio di Milano Monza Brianza Lodi, vede in seconda posizione i vini (6,2 miliardi a +3,3%), seguono pane, pasta e farinacei (3,9 miliardi di euro a +2,5%). Oltre i 3 miliardi anche la frutta (+2,4%), i prodotti lattiero caseari (+3,2%), le carni e i prodotti non lavorati da colture permanenti, tra cui uva e agrumi. A far registrare le performance migliori sono pane e prodotti di pasticceria, a +72% con 1,2 miliardi; prodotti per animali (+10,5%), e gelati (+7,4%). Nel complesso, vale 41 miliardi di euro l'agroalimentare italiano nel mondo, in crescita a +1,4%, e i principali destinatari sono Germania (+1,6%), Francia (+4,3%), Stati Uniti (+4%), Regno Unito (+1,6%).

AMAZON LAUNCHED THE CLICK-AND-COLLECT COUNTERS SERVICE IN ITALY AND UK

Amazon launched 'Counter', a delivery option that allows customers to retrieve parcels from staffed counters at Uk and Italian retailers. The functioning is quite simple: when the order has been placed on the website, customers select the Counter pick-up point most suitable to their needs as their delivery location. The customer will receive an email once the item has arrived in store with a barcode which store staff will scan in order to retrieve their parcel. From that moment, customers will have 14 days to collect their parcels. In Italy, Amazon has launched its Counter service teaming up with bookstore chain Giunti and the network of Fermopoint and SisalPay stores. In the Uk, the official partner is the Next apparel chain. However, the e-commerce giant said that it is "actively looking to bring even more partners onboard across Europe."

Amazon lancia Counter in Italia e Uk, il servizio di ritiro nei punti vendita al dettaglio

Amazon ha introdotto, in Italia e nel Regno Unito, il nuovo servizio di ritiro Counter, che dà al cliente la possibilità di ritirare i propri ordini presso migliaia di punti vendita al dettaglio. Il funzionamento è semplice: dopo aver completato l'ordine sul sito, i clienti procedono al pagamento e selezionano il punto di ritiro Counter più comodo. Non appena l'ordine viene consegnato, i clienti ricevono una mail di notifica con un codice a barre univoco oltre all'indirizzo e agli orari di apertura del punto vendita. Da quel momento, hanno 14 giorni di tempo per ritirare l'ordine. In Italia, Amazon ha scelto come partner per il lancio di Counter la catena di librerie Giunti e i punti SisalPay e Fermopoint. Per la Gran Bretagna, invece, il partner è la catena di abbigliamento Next. Un'opportunità che, tuttavia, Amazon intende estendere presto anche ai piccoli negozi di quartiere e alle catene.

THE BRAZZALE GROUP PRESENTS THE "FILIERA ECOSOSTENIBILE PANNA", ECO-SUSTAINABLE CREAM CHAIN

The first sustainable chain devoted to cream has come to life thanks to the Brazzale Group. In greater details, it is an organized system that can choose the best milk for each type of butter, depending on the nutrition and bovine races, among those of the Brazzale Group in Italy and Czech Republic. "We started thinking about the whole chain in a completely different manner, starting from the milk selection and collection, to the building of devoted plants and lines, and to the great care paid during the centrifuging operations and rising of the cream, to obtain the best cream to churn", explained Roberto Brazzale, President of the Group. "Our goal was to put the butter back at the core of the chain, controlling each stage of the production process for both the varieties of butter we produce in the Eco-Sustainable Cream Chain: the Burro Superiore Fratelli Brazzale and the Burro delle Apli Premium".

Il Gruppo Brazzale presenta la 'Filiera Ecosostenibile Panna'

Nasce la prima Filiera ecosostenibile interamente dedicata alle panne, ideata dal Gruppo Brazzale. Si tratta, in dettaglio, di un sistema organizzato che può scegliere il migliore latte di raccolta per ciascuna tipologia di burro, in ragione dell'alimentazione e delle razze bovine, tra quelle del gruppo Brazzale in Italia e Repubblica Ceca. "Abbiamo adottato un atteggiamento completamente diverso di pensare alla filiera nel suo complesso, cominciando dalla selezione e dalla raccolta del latte, passando per la costruzione di impianti e linee 'ad hoc', e arrivando all'estrema cura delle operazioni di centrifugazione e affioramento, per ottenere le migliori panne da burrificare", spiega Roberto Brazzale, presidente del Gruppo. "L'obiettivo è stato riportare il burro al centro della filiera, curando ogni anello del processo produttivo, e ciò per entrambe le tipologie di burro che realizziamo nella Filiera Panna Ecosostenibile: il Burro Superiore Fratelli Brazzale e il Burro delle Alpi Premium".

THE PGI CONQUERS COCA-COLA: A BRAND-NEW FANTA WITH SICILIAN BLOOD ORANGES WAS LAUNCHED

Over the last few weeks, the new "Fanta Red Orange with no added sugars and with the juice of Sicilian PGI blood oranges" was presented. It is the result of a collaboration between the Consortium of protection of blood orange of Sicily and the multinational company Coca-Cola. The new soft drink will be produced using exclusively blood oranges supplied by Sicilian producers adhering to the Consortium and, according to Coca-Cola, it will contain 20% of orange juice. Fanta Red Orange will be available in 25 cl glass bottles or 66 cl and 1 l Pet, they will be 100% recyclable. "With Fanta red Orange, we pay tribute to Fanta's Italian origins, in fact it was born in Naples back in 1955 and it is still prepared today with 100% Italian oranges", declared Cristina broch, Communication Director of Coca-Cola Italia. It is the first time ever that a product of a big multinational company has the PGI mark on its label.

L'Igp sbarca in Coca-Cola: nuova Fanta con arance rosse di Sicilia

Presentata nelle scorse settimane la nuova 'Fanta aranciata rossa zero zuccheri aggiunti con il succo delle arance rosse di Sicilia Igp', che vede la collaborazione tra il Consorzio dell'arancia rossa e la multinazionale Coca-Cola. La nuova bibita sarà preparata con solo succo di arance rosse fornite da produttori siciliani aderenti al consorzio e, secondo Coca-Cola, conterrà un 20% di succo d'arancia. Fanta aranciata rossa sarà disponibile in bottiglie di vetro da 25 cl oppure in Pet da 66 cl e da 1 litro 100% riciclabili. "Fanta aranciata rossa è il nostro omaggio alle origini italiane di Fanta, nata a Napoli nel 1955 e che, ancora oggi, è preparata con il succo di arance 100% italiane", ha dichiarato Cristina Broch, direttore comunicazione Coca-Cola Italia. È la prima volta che il prodotto di una grande multinazionale riporta in etichetta il marchio di origine Igp.


caseificio
Pezzana
dal 1946
Sautéed or Grilled?
Grigliata di Tomini
SOLO LATTE ITALIANO
BIG PACK
Spadellata di TOMINI
100% Latte Italiano
SMALL PACK
Our Tomini are perfect in every season.
For a summer barbecue with friends or
pan-fried for a winter meal with your family...
It's always the right occasion!
Find out more on www.pezzana.it

THE TRANS-FATS REVOLUTION

BRUSSELS ADOPTS A NEW REGULATION TO CURB THEIR PRESENCE IN FOOD ALL OVER EUROPE FROM APRIL 2021. THE LIMIT IS SET AT 2 G PER 100 G OF FAT.

In recent years, there has been a global push to limit the amount of trans-fats that reach consumers due to their adverse health effects, especially regarding cardiovascular health. On the past April, the European Commission adopted a new regulation that will restrict the amount of artificial trans-fats in food to a maximum of 2 grams per 100 grams of fat. The new regulation will apply from April 2, 2021 throughout the European Union market. Some EU Member States already had regulations around trans-fats in place, but this is the first EU wide legislation to come to the fore.

What are trans-fat?

Trans-fats, also known as hydrogenated fats or partially hydrogenated vegetable oils, are largely produced industrially by a process called hydrogenation that transforms liquid oil into solid fat. This type of substance can be found in large part of processed products such as industrial bakery, chips, snacks or refined cereals. Manufacturers often use them as they have a longer shelf-life than other fats. Trans fats can also be naturally present in the fat of cows, sheep or goats, such as in meat or dairy products.

Why are they a health concern?

In spite of the benefits that were supposed to them in a beginning, the most recent scientific studies have demonstrated that the trans-fats suppose a risk for the health.

According to the American Heart Association, trans-fats raise bad (LDL) cholesterol levels and lower good (HDL) cholesterol levels, increasing the risk of heart disease and stroke. They are also associated with a higher risk of developing type 2 diabetes.

As recommended by a study by the European Food Safety Authority (EFSA), consumers should keep the intake of trans-fats as low as possible to avoid health risks.

Trans-fats around the globe

In June 2015, the US Food and Drug Administration (FDA) determined that partially hydrogenated oils (PHOs), the primary source of trans fats, were not "generally recognized as safe" for any use in food. With this determination, the FDA had set a three-year deadline for food companies to eliminate artificial trans-fats from their products. In June 2018, the ban went into effect.

Again in 2018, the beginning of Canada's ban on partially hydrogenated oils (PHOs), the largest source of industrially produced trans-fat in foods, came into force. The Canadian Food Inspection Agency (CFIA) enforcement strategy for the new requirement includes a two-year phase-in period during which products containing PHOs can continue to be sold, as long as they were manufactured before September 17, 2018.

La rivoluzione dei trans-fats

La Commissione europea ha adottato un nuovo regolamento che fissa un limite massimo per gli acidi grassi trans nei prodotti alimentari europei, pari a 2 grammi di grassi trans per 100 grammi di grassi. Il regolamento si applicherà a partire dal 2 aprile 2021.

The World Health Organization recommends consuming no more than 1% of the daily energy intake as trans fats

For an adult consuming 2 000 kcal per day, this would mean not more than 2.2 grams per day

The majority of food products analysed in the EU contain less than 2 grams of trans fats per 100 grams of fat. In many of these the level is even below 0.5 grams trans fats per 100 grams of fat or trans fats cannot be found at all.

HOWEVER data also shows that there are still products on the European food market with high levels:

>2g* both pre-packed and non pre-packed such as some bakery products

40-50g* products such as some biscuits/popcorn

*per 100g of fats

Source: EU Commission

ICE CREAM IS 'HOT' IN THE U.S.

THE UNITED STATES HAVE A SWEET TOOTH FOR IT. SO MUCH THAT THEY ARE THE SECOND LARGEST MARKET IN THE WORLD, WORTH 11.4 BILLION DOLLARS YEARLY. A KEY BUSINESS FOR MADE IN ITALY TOO.

Americans? They are 'ice cream lovers'. With around 2.7 billion litres in 2016 and an average per person consumption of 8.4 litres, the US represent the second largest ice cream market in the world, after China, and the fourth if we consider per person consumption. The consultancy ExportUsa highlights that the branch is worth up to about 11.4 billion dollars per year (more than 10 billion euros).

Ice cream is one of the most popular products in the US, a food with a strong success among Americans, which is constantly increasing in sales, with an even more positive trend for the healthier varieties. Today, the market is indeed mainly driven by 'healthy' ice cream. Because even the Americans, who famously can't turn down delicious treats, are becoming more conscious about health and wellness, so they have started to change their eating habits in order to lead a healthier lifestyle. According to the Nielsen research 'Global Ingredient', 68% of the consumers say that they would pay a premium price in order to eat foods with no unwanted ingredients. This trend, which applies to ice cream too, encouraged many small-scale manufacturers to give the frozen world a try. The Halo Top brand, for example, reached the top of the ranking of the big ice cream manufacturers thanks to its innovative line of high-protein ice cream: *Time Magazine* reports that the brand sales increased by 2,500% in 2017, outdoing the well-known Haagen-Dazs and Ben & Jerry and obtaining the 5% of the American ice cream market in just five years. A further solution provided by producers in order to overcome the concerns of American consumers about sugars, or to meet the needs of diabetic or overweight persons, is represented by low-calorie ice cream, which is prepared with the lowest amount of fat possible and replacing sucrose with fructose, aspartame or Splenda. Not to mention the success achieved in the US by the allergen-free ice creams (often labelled as 'Big 8 friendly', which refers to the 8 main allergens known in America) and the ice cream for lactose-intolerants: the variety 'without animal milk' has grown in sales more than any other sub-category (+49% on an annual basis). The way has been already paved for dairy-free, gluten-free, vegan and non-GMO products, but also the ones with no artificial flavours, colours or preservatives. This trend caused the so called 'Bio-Boom', which is closely related to the growing interest in the organic eating. The sales in non-GMO products in America have increased by 3 billion dollars in 2016 (+16% on an annual basis). Such a scenario should pave the way for the Italian ice cream, that according to ExportUsa is becoming a real symbol, almost equal to pizza and pasta. The Italian 'gelato' (ice cream), first of all, is already different from the American one because of its name, but its strength lies definitely in the recipe. While, in general, the American products consist of 50% of air and 30% of cream or butter; the Italian brands contain less than 10% of air, which gives them a more intense flavour, and less than 7% of fats, providing a lower calorie intake (compared to the 25% of fat of the American ice cream): a scoop of gelato contains only 100 calories, only a half of the American ice cream calories. Sometimes the Italian product can even have 65% less fat than some American premium brands (which also have a premium price). Lastly, as said by ExportUsa, we must remember what's the real added value of the Italian gelato, which is common for the majority of food products from Italy: their long-standing tradition, which is what the Americans find most appealing.

Gelato: un business 'caldo' negli Usa

Il Paese a stelle e strisce ne va ghiotto. Tanto da rappresentare il secondo mercato al mondo, dopo la Cina, per un valore di 11,4 miliardi di dollari l'anno. Cin forte crescita la richiesta per le tipologie bio e healthy. Un business d'interesse anche per il made in Italy.

HANDMADE ICE CREAM: EUROPEAN STATISTICS

50 thousand small enterprises

30 thousand workers

Turnover of **9 billion euros** (or 60% of the international market)

4% annual growth rate

39 thousand ice cream parlours in Italy, the highest number in the world

Tiramisù chosen as 'Europe's flavour' in 2019

BETTER WITHOUT?

CIWF ITALY AGAINST THE 'ANTIBIOTIC FREE' CLAIM. "A MISLEADING CAPTURE THAT DOES NOT GUARANTEE ANY HEALTH BENEFITS", SAYS ANNAMARIA PISAPIA, MANAGER OF THE NON-PROFIT ORGANIZATION. BUT A MORE RESTRICTIVE LAW IS DUE TO TAKE EFFECT FROM 2022.

The NPO Compassion in world farming (Ciwf), involved in promoting animal welfare, opens the debate over meats, cold cuts and eggs coming from animals bred without antibiotics. Arguing that these products are better than the others.

A widespread belief

Ciwf wants to shed light on a more and more common fact: the choice of products without antibiotics because of their better quality and smaller risk for health. According to the NPO, this is not true. "The Antibiotic free is just another marketing operation carried out by the big supply and production companies", explains the director Annamaria Pisapia, "that thanks to misleading captures make consumers spend more just to buy products that in the majority of cases does not guarantee a better health or healthier animals". The NPO also analysed some false myth about the 'antibiotic free' products, which often come from intensive farming just like their counterpart. Moreover, Ciwf encourages the consumption of products coming from free-range or organic farming, which provide high standards for animal welfare.

Misleading captions?

When reading the 'antibiotics free' claim, we immediately think that there are no residual medicines. But this is not a real benefit, since it is a common characteristic among all the meat products in the supermarket refrigerated counters: every type of meat on the market has indeed no residues of antibiotics. After the administration of antibiotics, farmers are legally obliged not to give medicines to the animal for some days before they are butchered. The caption means specifically that the meat comes from animals bred without antibiotics. Moreover, also the caption 'antibiotic free for the last four months' is misleading, always according to Ciwf, because usually antibiotics are not used in the last four months of life of animals coming from pig farming and cattle breeding, regardless of whether they are labelled as 'antibiotic free' or not. There is a simple reason for that: the majority of antibiotics are used when animals are still young, especially during the weaning or after long journeys. There is also no information about how much and which antibiotics are administered to the animals in their first days of life and until the withdrawal period specified on the label. We even do not have information about the 'collateral' use of antibiotics, that means the ones given to the animals that are not involved in the 'antibiotic free' chain, because they became ill and had to receive therapies.

"There is no guarantee that the animals are healthier"

According to the analysis of Ciwf Italia, there is no guarantee that the animals bred without antibiotics are healthier. There is rather a possibility that 'antibiotic free' brings no improvement at all. Not only: especially for cattle and pigs, it is possible for the cures to be delayed in order to keep the animal inside a more efficient chain of production, or it will be more expensive for the consumer. So what could be the solution? Better chose the meat of brawnier breeds and animals bred in better conditions, regardless the indications provided about antibiotics administration. We can also get to a paradox: in order to compensate for the lack of antibiotics, some use other medicines that can cause resistance and could have side effects.

Europe battens down the hatches

This is still a key subject for the institutions, especially for the European ones. In order to counter the threat of the 'superbugs' the European Parlament has approved a list of restrictions on antibiotics administration to livestock. New guidelines, due to become law by 2022, have been voted on 25th October and they ban many antibiotics intended for the human consumption in veterinary medicine and antimicrobial without prescription. But what will happen actually? The use of antibiotics will no longer be collective and precautionary, but limited to the individual animals and only if a concrete risk of infection has been actually proved. So the antibiotics will be administered after a veterinary prescription and only after the necessary tests. Moreover, according to the new rules, the medicines can't be used to stimulate the growth of the animals.

More safety and more welfare

Besides being safer for consumers, restrictions on the use of antibiotics will contribute to the improvement in the life of animals bred for consumption. These will indeed provide a change in the current livestock system, forcing the farmers to work for the improvement in the life of animals. "This is a great victory for public health and the welfare of livestock animals in all the EU", says the Euro MP Molly Scott Cato, of the Green Party of England and Wales.

Antibiotici: meglio senza?

La onlus Compassion in world farming (Ciwf), organizzazione attiva per il benessere animale, apre il dibattito su carni, salumi e uova derivanti da animali allevati senza antibiotici. Provando a mettere in discussione ciò che sembra un dato acquisito e ineluttabile, ovvero il fatto che questi prodotti siano migliori degli altri. Ma dal 2022 entra in vigore una norma europea più restrittiva.

PARMACOTTO ENTERS THE US

THE COMPANY ACQUIRED THE FOOD DISTRIBUTOR CIBO ITALIA AND IS NOW READY TO CONQUER THE AMERICAN MARKET. INTERVIEW WITH ANDREA SCHIVAZAPPA, CEO.

Founded in Parma in 1978, Parmacotto has now entered the US market through the acquisition of the food distributor Cibo Italia and the creation of Parmacotto LLC. 70% of the company is controlled by Parmacotto, while the remaining 30% is owned by the founding members of Cibo Italia: Larry Saia and Alessandro Sità, now respectively President and Ceo of Parmacotto, LLC. We talked to Andrea Schivazappa, Ceo of Parmacotto, in order to discuss about the acquisition and the future plans for the US market.

How did the operation begin?
It all started at the Fancy Food Show, last year. We spoke to operators, checked stores and business opportunities and we realised that the American market is evolving.

What do you mean?
The consumer is changing his habits and is always more conscious about the products he buys. So we believe that there is a place for our brand here.

What happened next?
We first got into contact with our partner, Cibo Italia. We discussed about strategies, products and distribution with them. We talked especially about the values of their and our own company and we realized to be on the same page: very high quality and service to the final consumer. That is how the project began: Larry Saia and Alessandro Sità of Cibo Italia remained our partners with a share worth 30% and they are part of our board of directors, because we believe that their contribution is fundamental to the success of the project. We want to use the channels and positioning of Cibo Italia, which is now called Parmacotto LLC, to introduce our brand and products.

Can you tell us something about the first tests?
The results were good: our cooked ham and our roasts have been really appreciated. We created our products by holding firm to our technologies and we are going to adjust the products to the demands of the American market. This won't be anything radical, because we already received a positive feedback.

Did you carry out any market survey on your brand image?
We are currently working on it. We want to work on graphics and language too, in order to meet the needs of our American consumers.

What is your forecast for 2020?
Translating into numbers, Cibo Italia developed a turnover of 12 million dollars in 2018 and we forecast a 25% increase in the next three years. The goal is to reach the 20 million dollar threshold by 2020 already.

From the left: Andrea Schivazappa (ceo) and Giovanni Zaccanti (president)

Parmacotto sbarca negli Usa
Parmacotto acquisisce il distributore Cibo Italia e costituisce Parmacotto Llc, controllata per il 70% dalla società emiliana e per il restante 30% dai soci fondatori di Cibo Italia. I retroscena dell'operazione e gli obiettivi sul mercato Usa in un'intervista ad Andrea Schivazappa, ceo di Parmacotto.

HOW WILL THE FUTURE BE?

CONSUMPTION TRENDS, PRODUCTION AND WORLD EXPORTS ACCORDING TO THE ANALYSIS OF THE EXPERTS OF THE CLAL.IT TEAM. IN ORDER TO KNOW WHAT TO EXPECT FROM THE YEARS AHEAD. WITH A SPECIAL FOCUS ON THE CANADIAN MARKET.

Per person cheese consumption has increased in all countries in the last five years. In the two largest markets, EU-28 and the US, it has grown by 7% and 12% respectively compared to 2013. The statistics for South-East Asia still show low consumption but also a considerable growth potential. In this area, Japan is becoming the largest importer of dairy products, with a low but steady trading volume. In Canada, like the other countries in the Northern hemisphere, the aged cheese is more popular and the country is currently witnessing a significant growth (+25%). On the contrary, in the Southern hemisphere the most popular type of cheese is the fresh one. Cheese consumption in the EU in 2018 was almost steady (+0.82%) compared to 2017.

Clal.it experts forecast that the world dairy production is going to grow by 1.2% in 2019, after the +1.8% registered in 2018. If we individually analyse the producing countries, the EU remains at the first place on a global scale, with more than 10 million tons. The US ranks second, at almost 6 million tons, steadily growing since 2015. Cow's milk cheese in Europe seems to be a prerogative of just three countries, which own the 50% of the production: Germany at first place with 25%, France at second place with 18% and Italy at third place with 12% of the production of cow's milk cheese.

International trading of cheese is expected to register only a slight increase in 2019. But it won't be an off-year anyway. The expected slowdown is probably associated with uncertainties about government and taxes. The international trading has grown by 0.7% between February 2018 and January 2019. The export from the EU (+1%), the US and Belarus has developed too, while New Zealand is slowing down. Globally, as explained by the Clal.it experts, statistics also show that Europe has balanced out the decrease in export to Russia after the imposition of the embargo. The data demonstrate that the country is trying to become economically independent. In general, every country's government, EU first and foremost, is trying to reach commercial agreements in order to facilitate and enhance trade. The largest target market for the Italian milk and dairy products are the US, followed by Japan.

The indicator of protein supply is still a key factor, usually connected with the price of milk. For example, a reduction in milk's price happened alongside the decrease in protein in 2016. Now protein have been steadily increasing since November 2018; this also suggests a further increase in milk's price. Instead, the price of cheese is supposed to remain the same in the following months.

The most popular type of cheese in Italy is the hard cheese, whose production takes more than 51% of the milk processed in Italy. Close behind the fresh cheese (31%), the soft cheese (11%) and, lastly, the semi-hard cheese (8%). The market of PDO and non-PDO cheese shows a similar situation, because the PDO cheese takes 53% of the production of cow's, sheep's, goat's and buffalo's milk.

In 2017, 43% of the Italian milk (collected or imported, from cows, sheep, goats and buffalos), was used for the production of PDO cheese, 39% for other purposes, mostly for non-PDO cheese, 10% for UHT milk and 8% for fresh milk. In terms of cheese production: in 2017, 94% was produced with cow's milk, 4% with sheep's milk, 2% with buffalo's milk and 1% with goat's milk.

According to the studies carried out by ISTAT and analysed by Clal.it, the most imported types of cheese in Italy between January and December 2018 were melted cheese (+20%) and non-PDO hard cheese (+25%), which have shown the best growth performance. The cheese intended for processing (+13%) and mozzarella (+4.2%) are growing too. Instead, cheeses with less than 40% fat content registered a sharp decline.

Export of cheese from Italy hold almost steady in 2018, at +0.7%, confirming the exploit of 2017, when it increased by 6.8%. In terms of different types of cheese, Provolone obtained great results, with a 16% growth, the same happened with non-PDO hard cheese (+14%), Grana Padano and Parmigiano Reggiano (+5.6%), grated cheese (+5.3%) and fresh mozzarella (+5.2%). Instead, Fiore Sardo and Pecorino registered bad results, a 29% drop, the same as the category 'Asiago, Ragusano, Caciocavallo and Montasio' (-23%) and Mascarpone cheese (-6.3%).

If we consider the past statistics for import and export of cheese, they have been significantly and steadily growing outside the country since 1991.

Today, the gap between import and export has considerably reduced and the differential is currently of little more than 100 thousand tons in favour of import. In terms of worth, export has now sharply outdone import turnover by 1 million euros. This confirms the fact that, in 2018, the Italian dairy industry exported less and at a higher price than before.

Formaggi: quale futuro?
Andamento di consumi, produzione ed export mondiali secondo l'analisi degli esperti del team di Clal.it. Con un focus sul mercato canadese e un'analisi della composizione del latte. Per capire cosa ci aspetta nei prossimi mesi.

follow

ITALIAN EXCELLENCE

For over 50 years, we pursue an aim of first-class and steady quality.
Our products can be guaranteed as good and safe because made with the good Piedmontese milk, coming from our controlled and certified protocol chain, straight from the stable to the finished product.

Inalpi, since 1966, good, right and safe values.

LATTERIE inalpi

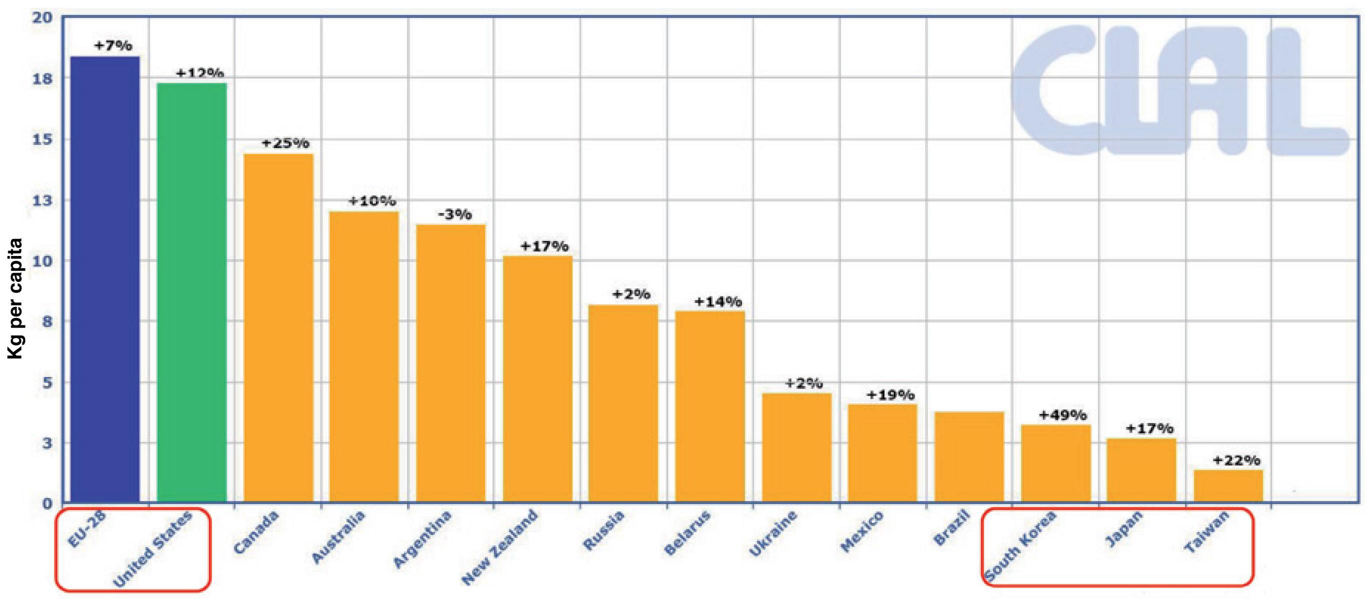
www.inalpi.it

HOW WILL THE FUTURE BE?

Per capita consumption of cheese

Variation % of 2018 on 2013

Clal processing



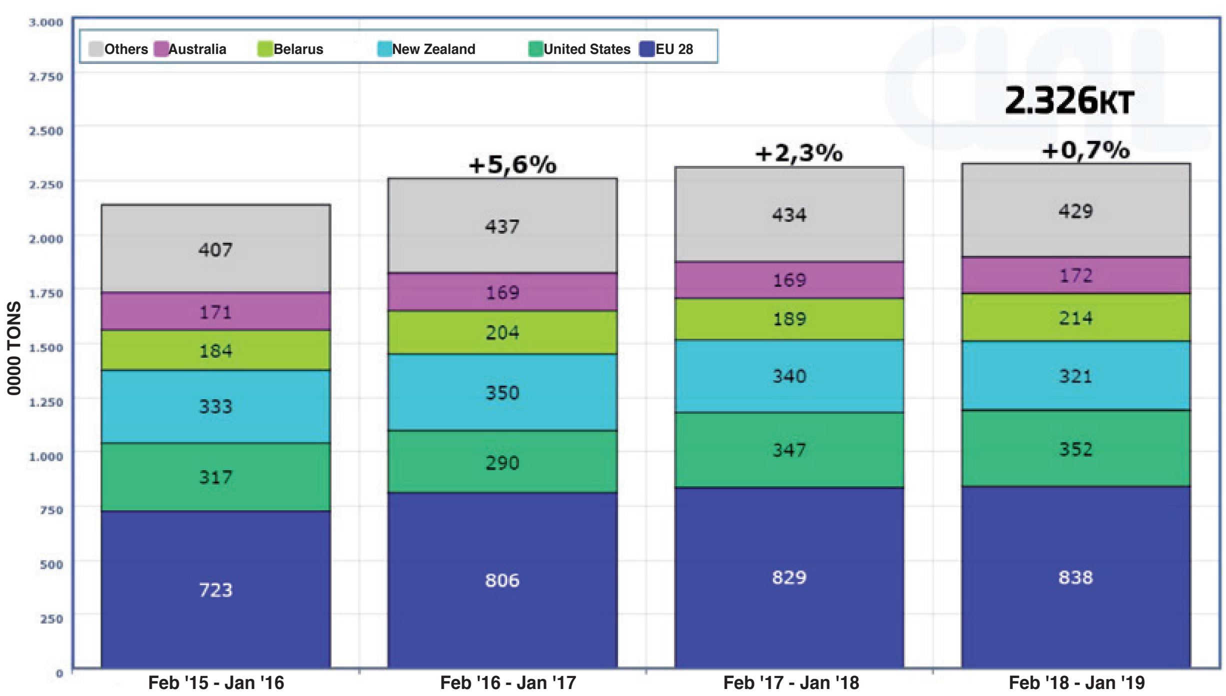
Country	2014 Kg	2015 Kg	2016 Kg	2017 Kg	2018 Kg	± on 2017
EU-28	17,51	17,87	17,82	18,18	18,33	+0,82%
United States	15,66	16,09	16,70	16,95	17,23	+1,62%
Canada	11,43	11,54	12,62	13,76	14,34	+4,22%
Australia	11,29	11,34	11,40	11,90	11,95	+0,40%
Argentina	11,82	12,07	11,59	10,96	11,41	+4,17%
New Zealand	8,76	8,88	9,01	9,77	10,11	+3,38%
Russia	7,46	7,31	7,47	7,92	8,13	+2,56%
Belarus	7,06	7,27	7,49	7,60	7,83	+2,95%
Ukraine	4,39	4,12	4,21	4,25	4,48	+5,30%
Mexico	3,53	3,77	3,89	3,96	4,02	+1,49%
Brazil	3,69	3,75	3,78	3,82	3,70	-2,99%
South Korea	2,34	2,71	2,68	3,12	3,19	+2,15%
Japan	2,17	2,31	2,39	2,55	2,60	+2,09%
Taiwan	1,11	1,23	1,36	1,35	1,31	-3,40%

Last update: 09/03/2019

Note: per capita consumption of every country is obtained by dividing total consumption (Source: FAS-USDA) by the number of people (Source: FAO, Eurostat).

Cheese export of the main supplier countries (HS 0406)

Clal processing of IHS data



CONSIDERED COUNTRIES: BR, JP, SG, IH,TH, CH, IR, NO, KR, AU, AR, NZ, UY, CN, RS, US, UA, UZ, EU, RU, IR, MA, AE, CA, BY, NI, PH, ID, ID, MY, MX, VE, EG, DZ

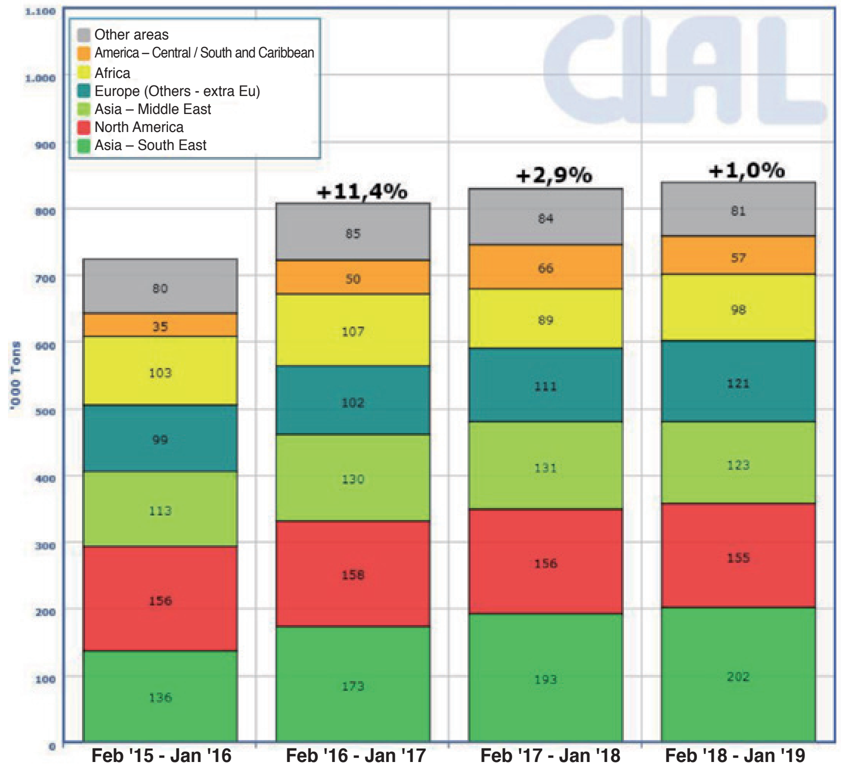
WORLD: Export CHEESE

Period	('000) Tons	± % y-o-y*
Last 12 months Feb '18 - Jan '19	2.267	+0,4%
Last 6 months Aug '18 - Jan '19	1.118	+1,1%
Last 2 months Dec '18 - Jan '19	380	+2,8%
Current year Jan - '19	184	+6,0%

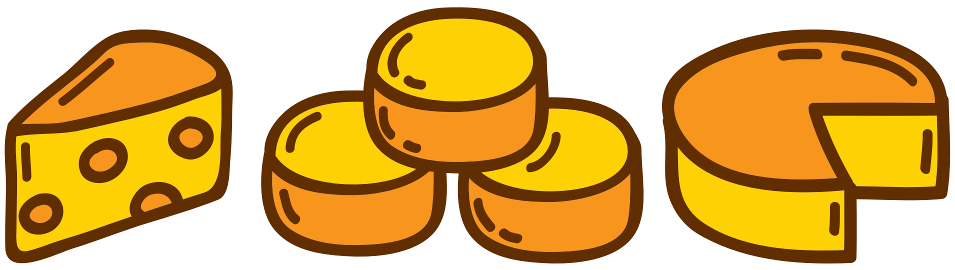
*y-o-y: Same previous period
(Exporters: AE, AR, AU, BR, CA, CH, CN, EU, ID, IR, JP, KR, MA, NI, NO, NZ, PH, RS, RU, SG, TH, TR, UA, US, UY)

Eu 28: cheese export by target geographical area (Last 12 months)

Clal processing of IHS data

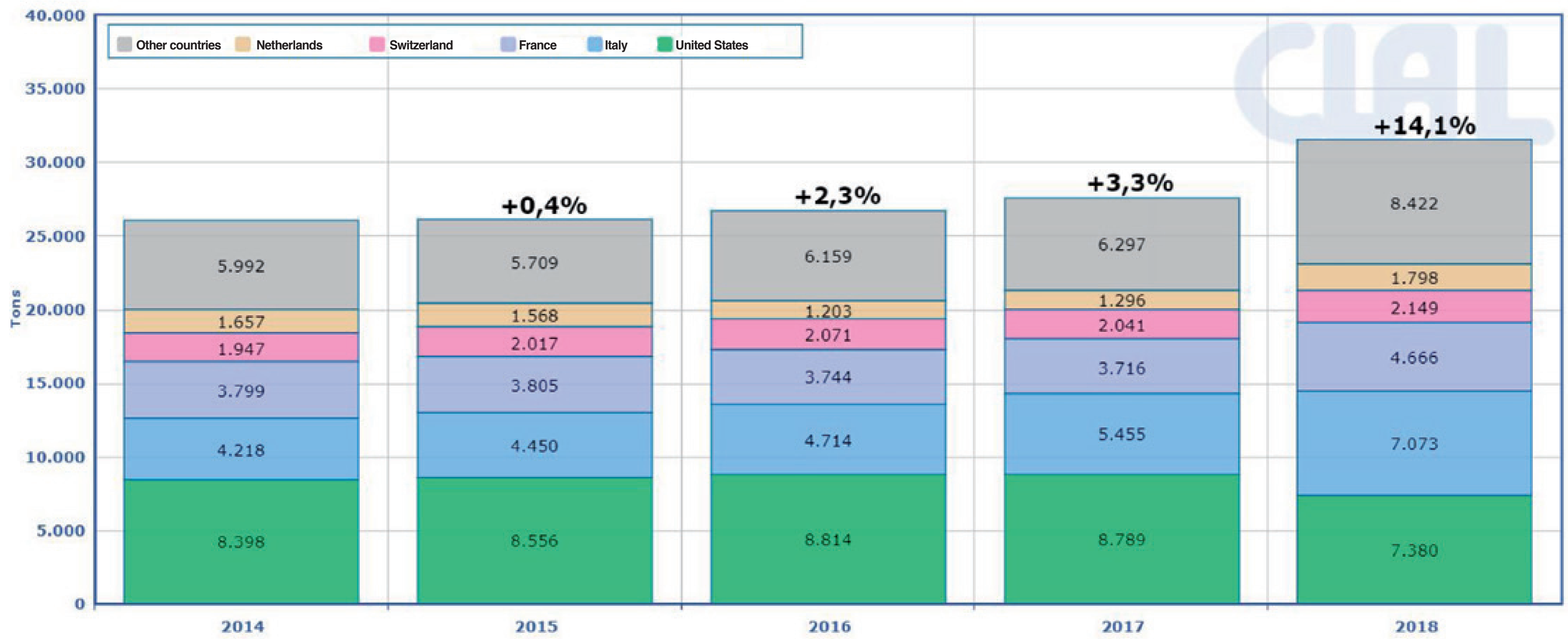


Tons	Main Country	Feb – Jan 2017/18	Feb – Jan 2018/19	VAR %
Asia – South East	Japan	93.458	109.190	+16,8%
North America	United States	139.624	134.578	-3,6%
Asia – Middle East	Saudi Arabia	40.087	34.693	-13,5%
Europe (Others - extra EU)	Switzerland	60.871	61.982	+1,8%
Africa	Algeria	23.188	23.193	+0,0%
America – Central / South and Caribbean	Chile	22.417	15.636	-30,3%

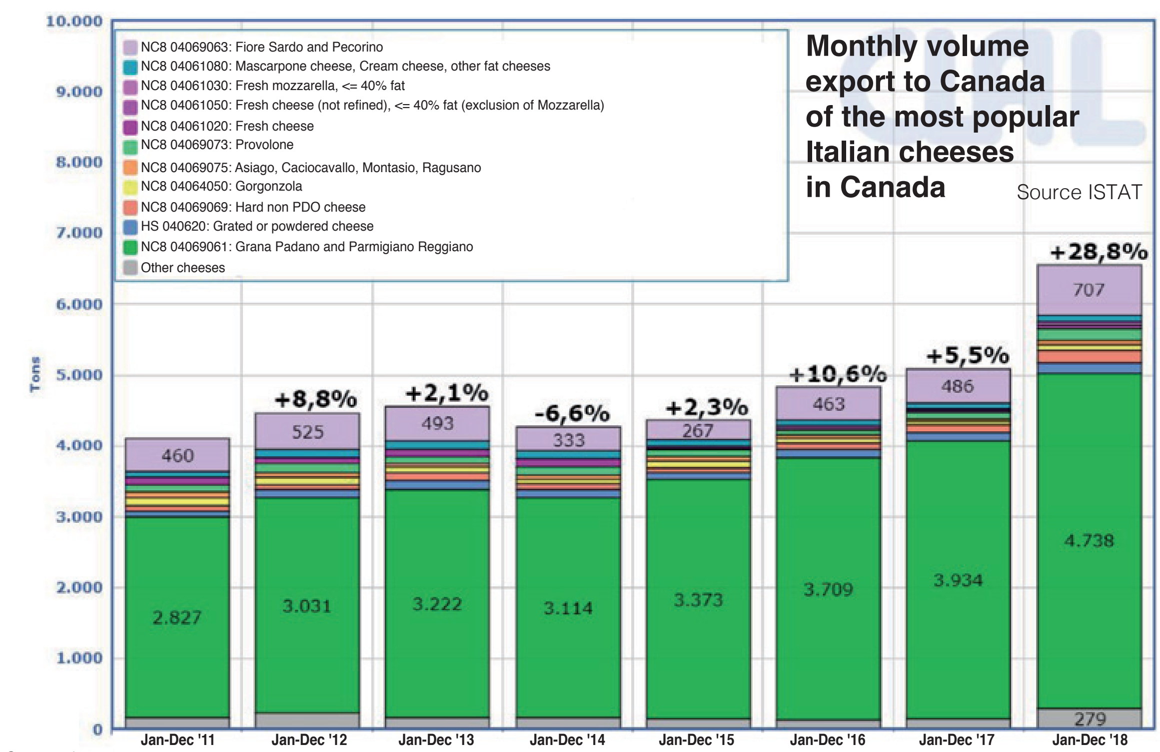


Cheese Import (HS 0406) – Volumes (yearly)

Clal processing of IHS data



Cheese export to Canada (Volumes)



Monthly volume export to Canada of the most popular Italian cheeses in Canada

Source ISTAT

Fresh cheese (not refined), <= 40% fat (exclusion of Mozzarella) (NC8 04061050)	+7.7%
Fresh mozzarella, <= 40% fat (NC8 04061030)	+292%
Fiore Sardo and Pecorino (NC8 04069063)	+43%
Mascarpone cheese, Cream cheese, other fat cheeses (NC8 04061080)	+23%
Provolone (NC8 04069073)	+92%
Asiago, Caciocavallo, Montasio, Ragusano (NC8 04069075)	+34%
Gorgonzola (NC8 04064050)	+74%
Hard non PDO cheese (NC8 04069069)	+70%
Grated or powdered cheese (HS 040620)	+27%
Grana Padano and Parmigiano Reggiano (NC8 04069061)	+20%

Source: Istat

end

JOIN NEW YORK'S BIGGEST SPECIALTY FOOD SHOW

NORTH AMERICA'S LARGEST EVENT DEDICATED TO FINE F&B IS BACK FROM JUNE 23 TO 25. IN THE FOLLOWING PAGES, A PREVIEW OF THE PRODUCTS THAT WILL BE PRESENTED DURING THE TRADE SHOW BY ITALIAN EXHIBITORS.

The Summer Fancy Food Show returns with its 65th edition, at the Jacob Javits Center, New York, on June 23-25, 2019. Over 2,600 exhibitors will cover more than 14.5 football fields of space and showcase more than 200,000 specialty food products at North America's largest specialty food and beverage trade show, organized by the Specialty Food Association (SFA). "This is an exciting time in the specialty food industry," says Phil Kafarakis, president of SFA. "Consumers are demanding high quality foods with top-of-the-line ingredients. The Summer Fancy Food Show has become a top resource for buyers and retailers working to meet this consumer demand. The show highlights high quality and innovation, offering the chance to sample the newest of the new and the best of the best. It's not to be missed." In the following pages, a preview of the new products that Italian exhibitors will be presenting to international buyers and professional operators during the trade show.

Summer Fancy Food Show 2019: vetrina prodotti
Torna l'appuntamento con il salone internazionale più importante di tutto il Nord America per il settore food & beverage. Attesi dal 23 al 25 giugno, presso il centro congressi Jacob K. Javits di New York, oltre 2.600 brand e più di 200mila visitatori professionali provenienti da tutto il mondo. Nelle pagine seguenti, un'anteprima dei prodotti che saranno presentati in fiera dagli espositori italiani.

follow

PARMACOTTO®

NOW
IN AMERICA.

VISIT US AT 65TH SUMMER FANCY FOOD SHOW

NEW YORK CITY JUNE 23 – 25, 2019

BOOTH 2669

parmacotto.us

BARBERO DAVIDE

www.barberodavide.it

NOUGAT GRAN CRU

Three special recipes born from a careful research of the best raw materials. 'Hazelnut Crumbly Torrone' - produced with the best Piedmont hazelnuts, acacia honey from Masio and muscovado sugar. 'Almond Soft Torrone' - produced with peeled twin almond pizzuta from Avola, lemon honey from Sorrento and Sicilian lemon skin peel. 'Pistachio Soft Torrone' - produced with green Bronte pistachios, Sicilian orange honey and orange skin peel from Sicily and Calabria.
Shelf life
2 years.
Packaging details
100 g metal box.

Visit us:
Hall: Upper Exhibition Hall
Level 3 - International Section
Booth: 2607

DELVERDE INDUSTRIE ALIMENTARI

www.delverde.com

WHOLE WHEAT AND ORGANIC PENNE RIGATE

Delverde whole wheat and organic Penne Rigate are rich in fibers and made with organic raw materials. Perfect texture, healthy and tasty and always 'al dente'.
Shelf life
24 months.
Packaging details
1 lb, packed in a resealable square bottom bag.
International certifications
Non-GMOs, Vegan International, Star K Kosher, Iso 9001, Brc, Ifs, Icea.

Visit us:
Hall: Level 3, Italian Pavilion
Booth: 2600-2602

PARMACOTTO

www.parmacotto.us

PARMACOTTO COOKED HAM

The product is featured by its natural and delicate taste, its light pink colour and its typical aroma thanks to the spices used during the the production process. Parmacotto cooked ham does not contain any allergens.
Shelf life
12 months.
Packaging details
Weight: 8,0 kg (18,51 lbs). Pack type: bag made of combined aluminium/plastic material.
International certifications
Brc, Ifs.

Visit us:
Hall: Level 3
Booth: 2669

DEVODIER PROSCIUTTI

www.devodier.com

CULATTA EMILIA

Approved for US export, Culatta Emilia is the heart of the ham, delicate and elegant in its sweetest classical interpretation. Flagship of the Devodier family, the culatta is partially covered by its rind to adapt to the greater hillside ventilation of the Apennines. The product is made with the finest Italian meat and it is cured naturally for more than 12 lunar months with only very little salt and protected with 'sugna'.
Shelf life
9 months.
Packaging details
Whole product, variable weight.
International certifications
Brc, Ifs.

Visit us:
Hall: Level 3
Booth: 2810

CONDORELLI

www.condorelli.it

TORRONCINI

Soft assorted nougat sweets.
Shelf life
15 months.
Packaging details
200 g. Bulk.
International certifications
Brc, Ifs, Fda.

Visit us:
Hall: Level 3
Booth: 2369

PASTICCERIA FRACCARO

www.fraccarospumadoro.it

VENEZIANA WITH LIMONCELLO

Spongy sour dough mixture with the fresh, aromatic fragrance of lemon. The infusion of lemon peels gives the palate intense aromas and strong flavors.
Shelf life
10 months.
Packaging details
500 g 'Giorgione' box line.
International certifications
Ifs, Icea.

Visit us:
Hall: Level 3
Booth: 2428

SILA GUM

www.silagum.it

LE PREZIOSE - GREEN APPLE AND CRANBERRY

Italian fruit jellies.
Shelf life
24 months from production date.
Packaging details
Gift box 200 g.
International certifications
Brc and Isf (grade A).

Visit us:
Hall: Level 3
Booth: 2629

SOTTOLESTELLE

www.sottolestelle.com

OAT AND TEFF 'RIGOTTINI' COOKIES

Delicious gluten-free vegan biscuits, free from milk and eggs. Delicate in taste with a slightly toasted typical aroma of teff flour and a crunchy texture.
Shelf life
365 days.
Packaging details
250 g + PP bag.
International certifications
ISO22005, Icea, Vegan Society.

Visit us:
Hall: Level 3, International section
Booth: 2505

DOLCERIA ALBA
www.dolceriaalba.it

TIRAMISÙ SAVOIARDI

The classic Tiramisù with a double layer of ladyfingers dipped in a mouth-watering cream of zabaglione and mascarpone. The dessert is served in a tub with reclosable lid.
Shelf life
18 months at -18°C/-0,4°F; 3 days at +4°C/+39,2°F.
Packaging details
500 g (17,64 oz) per selling unit. The dessert is served in a tub with reclosable lid. The tub is in a box, which is wrapped with film.
International certifications
Brc, Ifs, Halal and Utz (available from July).

Visit us:
Hall: Level 3
Booth: 2522

BISCOTTIFICIO GRONDONA
www.biscottificiogrondona.com

CANESTRELLI ANTICA GENOVA

Sweet butter cookies oven baked, made with wheat flour, butter and sugar. They occur with a hole in the middle and can be dusted at the time of consumption with the sachet of sugar inside. The origins of this recipe date back to the beginning of 1800 in a small laboratory where Mr Grondona started production following the old special recipe of his family. The same process is still used today, with natural cooling to room temperature. Canestrelli Antica Genova with butter still represent one of the best Ligurian sweet traditions, rich and simple.
Shelf life
8 months.
Packaging details
Net wt. 3.5 oz (100 g) box.
International certifications
Dnv, Iso 9001:2015.

Visit us:
Hall: Level 3
Booth: 2416 / 2418

DOLCIARIA MONARDO
www.dolciariamonardo.com

ATTIMI DI GUSTO

Tasty shortbread cookies with a delicate heart of hazelnut cream.
Shelf life
12 months.
Packaging details
140 g in box.
International certifications
Ifs, Brc.

Visit us:
Hall: Level 3
Booth: 2530B

BONOMI
www.fornobonomi.com

LADYFINGERS

Savoiardi (in English 'Ladyfingers') are a traditional Italian biscuit, with eggs as the main ingredient. Thanks to the simple ingredients used and the complete absence of added fat, Savoiardi are very light, nutritious and easy to digest. They are the traditional biscuit used for making Tiramisu, the most famous Italian dessert, as their structure is ideal to absorb the coffee used for making Tiramisu.
Shelf life
12 months.
Packaging details
Weight: 500 g. Material: packaging PP.
International certifications
Brc, Ifs, Halal Italia, IT-Bio-009.

Visit us:
Hall: Level 3
Booth: 2506

BORSARI VERONA - INDUSTRIA DOLCIARIA BORSARI
www.borsariverona.it

CUOR DI PANDORO AMARENA FABBRI

Cuor di pandoro Amarena Fabbri is a naturally leavened oven baked product.
Shelf life
240 days.
Packaging details
1000 g hand wrapped.
International certifications
Brc, SA8000, GMOs free.

Visit us:
Hall: Level 3
Booth: 2623

ZAGHIS
www.zaghis.eu

TIRAMISÙ

Tiramisù with savoiardi biscuits made according to the original recipe of Treviso (Veneto). The most famous dessert presented by Zaghis with extraordinary characteristics of long shelf life. It must not necessarily be stored in fridge.
Shelf life
240 days.
Packaging details
400 g, cellophane or box.
International certifications
Ifs.

Visit us:
Hall: Level 3
Booth: 2712

GALLONI F.LLI
www.galloniprosciutto.it

PARMA PROSCIUTTO BONELESS GOLD LABEL

Parma prosciutto deboned, trimmed, 24 months of ageing.
Shelf life
12 months after deboning date.
Packaging details
17 lbs and more each leg. Cases, 2 legs each.
International certifications
Iso 9001-2015; Brc/Ifs (highest grade); SA 8000; Ohsas 18001; Uni Iso 14001; Uni Iso/TS 14067; Carbon Footprint 14067; Uni Iso 50001; Uni Iso 22000; Uni Sos 22500; Cert. 231: Italian legality rating.

Visit us:
Hall: Italian Pavilion - Booth: 2804/2806

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

ITALPIZZA USA INC.

www.italpizza.com

WOOD FIRED RECTANGLE PIZZA GARDEN VEGETABLE WITH MASCARPONE CHEESE 10X15''

A delicious and crispy pizza, with vegetables and mascarpone cheese to enjoy the real experience of an Italian Pizzeria. Thanks to the dough proofed naturally for 24 hours, the crust is light and crispy; moreover, each pizza is hand-stretched by the company pizza makers and baked in a patented wood fired stone oven, using only real oak and beech woods, for an authentic, artisanal look of traditional Italian pizza. A product perfect for sharing with family and friends thanks to its special size 10X15" and its 'club pack' (2 pizzas for each box).

Shelf life
18 months.

Packaging details
2 - 23.63 oz (670 g) pizzas. Net weight 47.27 oz (2 lb 15.27 oz) 1.34 kg.

International certifications
Brc (grade A), Ifs (higher Level).

Visit us:
Hall: Level 3
Booth: 2725

VALDIGRANO DI FLAVIO PAGANI

www.valdigrano.com

ORGANIC ITALIAN SPELT PASTA

Organic spelt pasta, made of 100% Italian Dicoccum Emmer: an ancient whole grain, healthy and nutritious - excellent source of carbs, fibers, proteins, vitamins and essential minerals like iron and zinc. Organic spelt pasta can be a nutritious addition to the diet and can bring health benefits. It is also ideal for sport diets, thanks to a low glycemic index.

Shelf life
36 months.

Packaging details
500 g block-bottom pack.

International certifications
Brc, Ifs, Ecocert (organic), Halal, Kosher.

Visit us:
Hall: Level 3, Italian Pavillon
Booth: 2908

MASTER

www.gnocchimaster.com;
www.mammaemma.it

POTATO GNOCCHI WITH BEETROOT MAMMA EMMA

Gnocchi made with fresh potatoes steamed with their peel with beetroot. Ingredients: fresh potatoes, wheat flour, eggs, beetroot, salt.

Shelf life
60 days.

Packaging details
400 g.

International certifications
Iso 22000, Brc, Ifs, Fda, Icea.

Visit us:
Hall: Level 3
Booth: 2514-2516

DI LEO PIETRO

www.dileo.it

FATTINCASA WITH CHOCOLATE CHIPS

Fattincasa with chocolate chips are designed exclusively for the foreign markets. They preserve all the goodness of 'Made in Italy' under the Di Leo brand: ancient tradition, craftsmanship, and the use of simple, genuine ingredients. Tasty and rustic, Fattincasa with chocolate chips reproduce the authentic flavors of village celebrations and are made using the 'wire cutting' technique, an ancient method employed by Di Leo for generations. The line is completed by other four items: whole biscuits; biscuits made with fresh milk; biscuits with chocolate chips, cocoa and cream; vegan biscuits with no added milk and eggs, with chocolate chips.

Shelf life
365 days.

Packaging details
170 g bag type pack.

International certifications
Iso 22000, Iso 14001, Brc and Ifs.

Visit us:
Hall: Level 3, Italian Pavilion
Booth: 2604-2705

MOLINO PASINI

www.molinopasini.com

PRIMITIVA BIO

Organic Primitiva line is made from an accurate selection of organic soft wheat, 100% of Italian origin. Primitiva flours are rich in fibres, proteins and mineral salts. Presented in three variants - type 1, type 2 and wholemeal - Primitiva is recommended for all bread, pastry and pizza preparations for short, medium and long leavening time. Besides having all the characteristics of the Primitiva line, such as an unmistakable taste, exceptional elasticity and easiness of digestion, it is also eco-friendly and sustainable.

Shelf life
6 months.

Packaging details
10 kg paper bag.

International certifications
Brc, Ifs.

Visit us:
Hall: Level 3, Italian Pavilion
Booth: 2930-2932

RIZZOLI EMANUELLI

www.rizzoliemanuelli.com

ANCHOVY FILLETS OF CANTABRIAN SEA WITH CHILI

The Cantabrian sea Anchovy fillets comes from a high quality artisanal process, from fishing to packaging. In the Cantabrian sea, wedged between the northern coasts of the Iberian Peninsula and western France, the best anchovy fillets by size, pulp and taste are captured. Only the finest batches of fish caught in spring are used, left to mature with care for minimum 6 months and worked entirely by hand. Ideal to taste with bread and butter, perfect to enrich many recipes.

Shelf life
15 months.

Packaging details
Net weight: 70 g. Type of packaging: tray with oxygen barrier packaging technology (less than 0.5% oxygen in the tank) and anti-uv transparent film.

International certifications
Brc, Ifs.

Visit us:
Hall: level 3, Italian Pavilion
Booth: 2812

RULIANO

www.ruliano.it

RULIANO PEREX SUCTUM

Dry-cured ham is like Champagne: each house, each winery has its own characteristics. The same applies to dry-cured hams: always look at the manufacturer and brand, because each manufacturer has its own processing system that strongly determines the quality of the product. At Ruliano, we select only the best haunches from Italian pigs, born and bred in the heart of the Po Valley. Thanks to the experience of three generations, the 'unique and personal' manufacturing by Daniele Montali gives rise to the inimitable, enticing taste of the Perex Suctum Ruliano dry-cured ham. A 100% natural product, since only very little sea salt is used - the most ancient way to preserve food in a natural way - with no artificial preservatives or additives.

Shelf life
Boneless: 1 year.
Packaging details
Boneless: plastic bag + carton box.
International certifications
Brc, Ifs, Sa8000; Uni En Iso 14001:2004; Bs Ohsas 18001:2007; Uni En Iso 22005: 2008; Uni En Iso 22000:2005; Emas, EU Product Environmental Footprint (Pef) or 'Made Green in Italy'; Uni En Iso 50001, Iso/Ts 14067 Carbonfoot Print.

Visit us:
Hall: Level 3, Italian Pavilion
Booth: 2814

TARTUFLANGHE

www.tartuflanghe.com

BURROLIO, VEGAN CONDIMENT WITH WHITE TRUFFLE

Organic product made with Italian extra virgin oil, cocoa butter and white truffle (Tuber magnatum Pico). A condiment ideal for eggs, pasta, risotto, meat, fish and vegetables.

Shelf life
365 days.
Packaging details
75 g.
International certifications
Brc, Ifs, Vegan.

Visit us:
Hall: Level 3
Booth: 2609

PASTIFICIO DI BARI TARALL'ORO

www.taralloro.it

DI BARI 100% ITALIAN ORGANIC DURUM WHEAT PASTA

Pasta made with durum wheat semolina of the highest quality grown exclusively in Italy. This special line offers the bestseller Italian shapes: the 'Long line', so Spaghetti and Tagliolina with several flavours, and the 'Two Colors line', that proposes Farfalle and Garganelli. The goal is to offer an effective pasta line, both in the careful choice of ingredients and shapes. The Di Bari family has decided to launch this new brand to further underline the origins of the company, deeply rooted in the Apulia region.

Shelf life
24 months.
Packaging details
250 g in a personalized case by the Di Bari brand.
International certifications
Ifs, Bcr, Iso 14001:2004, OU Kosher, Nop/Bio.

Visit us:
Hall: Level 3
Booth: 2501A

TEDESCO

www.tedescogroup.it

ORE LIETE, LINEA DELUXE 'CLASSIC PANETTONE WITH SICILIAN CITRUS'

The line of Panettoni and Pandori Ore Liete comes from the ancient recipes of master confectioners. Inside them a soft, fragrant and highly digestible heart beats, thanks to the use of the yeast that is daily refreshed and regenerated. The secret of their goodness is all in the high-quality ingredients worked with care and passion as in time gone by. Another key ingredient is time: two days are necessary to make every Panettone and Pandoro take life.

Shelf life
6 months.
Packaging details
1000 g.
International certifications
Brc, Ifc, Utz, Organic, Fair Trade.

Visit us:
Hall: Level 3
Booth: 3020

PEDON

www.pedon.it/en

MORE THAN RICE

More than rice is an innovative way to eat pulses: 100% rice made of pulses. It is completely natural, gluten free, vegan, high in protein, fibre and rich in iron. Three varieties available: lentils, chickpeas and peas; peas and lentils; chickpeas and lentils.

Shelf life
24 months.
Packaging details
300 g box.
International certifications
Gluten free.

Visit us:
Hall: Level 3
Booth: 2825

BALOCCO

www.balocco.it

BOTTEGA BALOCCO-CHRISTMAS RANGE

Bottega Balocco signs high quality products, starting from the selection of excellent raw materials and creating true masterpieces of pastry art. Panettone cakes, with first quality candied fruit signed Agrimontana, are made only with sourdough yeast, fresh Italian milk and Italian barn eggs. They are cooled for eight hours upside down in a natural microclimate.

Shelf life
8 months.

Visit us:
Hall: Level 3
Booth: 2927

TENTAZIONI PUGLIESI

www.tentazionipugliesi.it

AEQUASALIS - MESQUETTE

Aequasalis - Mesquette are organic taralli produced with microbiologically pure sea water and without the addition of kitchen salt.

Shelf life
6 months.
Packaging details
150 g in transparent plastic bag enveloped in a paper box.
International certifications
Brc, Ifs, Organic.

Visit us:
Hall: Level 3
Booth: 2521

end

STORE BRANDS ARE FLYING HIGH OVERSEA

THE CATEGORY SURGED BY MORE THAN 40% IN U.S. LARGE-SCALE RETAIL OVER THE PAST FIVE YEARS, FAR OUTPACING NATIONAL BRANDS (+7,4%). THE DATA RELEASED BY THE PRIVATE LABEL MANUFACTURERS ASSOCIATION AND NIELSEN.

Store brands have never been more popular: according to the most recent statistics, nearly one of every four products sold in the U.S. today is a retailer's own brand. As highlighted in a report issued by Private Label Manufacturers Association (PLMA) based on Nielsen data.

For all outlets, in 2018 private label dollar sales in food and non-food consumables rose 4.4% to 128.6 billion dollars, while units gained 3.1% to 46.2 billion. Store-brand market share grew 0.5% in dollars to 18.5% and 0.6% in units to 22.3%. National brands were down in both dollar (-0.5% to 81.5%) and unit (-0.6% to 77.7%) share.

"With total sales gains of 5.5 billion dollars, store brands accounted for virtually half of all sales growth that was recorded in the major U.S. retail channels," Plma noted. "The all-outlets improvement was driven almost entirely by a 5.4 billion dollar sales increase for store brands in the mass channel." It is estimated that an additional 40 billion dollars in private label sales occurred in retailers not included in the Nielsen figure, which brings total private label sales to about 170 billion dollars.

The sector's performance across different channels

Last year, for the very first time the mass retail channel topped supermarkets in annual private label dollar sales volume both in food and non-food consumables, as well as in dollar and unit market share. U.S. mass merchants, wholesale clubs, dollar stores and military commissaries totaled private brand dollar sales of 60.8 billion dollars (+9.8% year over year). Unit volume rose 10.6%, totaling 19.9 billion dollars. In terms of private label market share, the mass channel gained 1.3% in dollars to 19.3% and 1.7% in units to 23.2%.

The supermarket channel, meanwhile, saw store-brand dollar sales inch up 0.5% to 59.8 billion dollars, while units fell 1.5% to 24.7 billion. Private label market share for supermarkets dipped 0.2% in both dollars and units, to 18.1% and 22.2% respectively.

For the mass channel, national brands posted 7.4% in dollar and 0.3% in unit sales growth in 2018, while all outlets saw increases of 12.6% in dollars and 6.4% in units.

Over the past five years, private label sales for mass retailers swelled 41% to 60.8 billion dollars in 2018 from 43.1 billion in 2013. Unit sales, instead, climbed 33.2% to 19.9 billion last year from 15 billion in 2013. "The gains in both dollar and unit volume sales continue to drive significant market share increases for retailer brands in the mass channel," Plma said in the 2019 Yearbook. "Unit market share climbed to 23.2% last year from 18.5% in 2013. Meanwhile, dollar market share advanced to 19.3% from 15.5% in 2013."

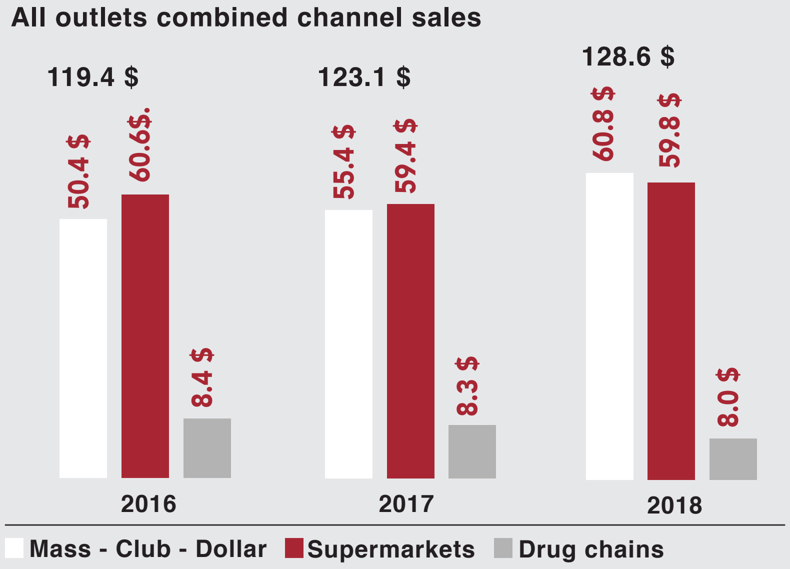
For supermarkets, private label dollar and unit consumables sales have declined for the past three years, save for a blip in dollar volume last year. "As with last year, the most likely explanation is that a large number of supermarket sales are migrating to the fast-growing mass channel as well as to online operators, among other emerging and non-traditional competitors. But the 2018 results may be an indication that the channel's losses are slowing," Plma explained in its report.

The analysis by category

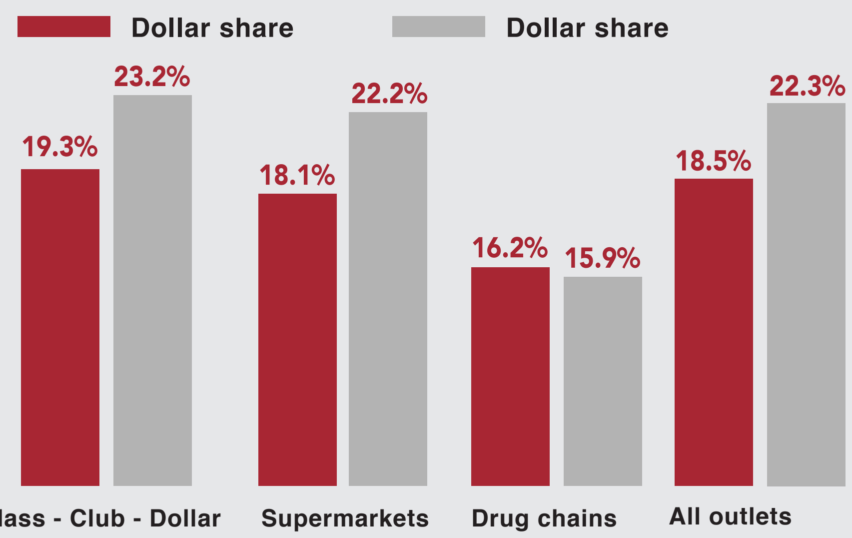
By category, the top five private label dollar sales gainers for supermarkets in 2018 were housewares and appliances (+96%), seasonal general merchandise (+32%), fresh eggs (+15.2%), wine (+13.1%) and fresh produce (+10%). The five leading supermarket categories in unit volume growth last year were housewares and appliances (+287.2%), dairy puddings and desserts (+20.7%), wine (+19%), skin care preparations (+9%) and fresh produce (+7.4%).

"In the fresh meat department, store brands picked up 1.6 percentage points dollar market share, and fresh produce added 1.1 points. Taken as a group, dollar share slipped 0.2 points across the combined departments in food, while the combined nonfoods sections were unchanged. But the dry grocery department, which equates to half of all nonfood sales for the supermarket channel, gave up 0.3 points in store-brand dollar share."

STORE BRANDS DOLLAR VOLUME IN BILLIONS



STORE BRANDS MARKET SHARE



Source: Plma/Nielsen

Le Private Label spopolano negli Usa

Negli ultimi cinque anni, il comparto ha messo a segno una crescita di oltre il 40% in Gdo, performando molto meglio dei marchi nazionali (+7,4%). Complessivamente, nel 2018 le vendite a valore di prodotti alimentari e non a Mdd sono aumentate del 4,4%, totalizzando128,6 miliardi di dollari. A volume, la crescita è stata del 3,1%, a 46,2 miliardi. Aumenta dello 0,5% a valore e dello 0,6% a volume anche la market share, che si attesta così rispettivamente al 18,5% e 22,3%. L'analisi della Private Label Manufacturers Association sui dati Nielsen.

The IVSI Manifesto

The Charter of our values

The consumer at the heart

1 History and tradition

We convey the tradition, history and know-how of deli meats producers
The legacy of the past determines the present and creates the future

2 Information and education

We strive to share transparent, comprehensive and correct information and to promote education about Italian deli meats
Knowledge broadens horizons

3 Quality and sustainability

We support and encourage the continuous improvement of the quality of Italian deli meats
The pursuit of excellence is a daily commitment

4 Bond with the territory

We believe in the unbreakable bond between deli meats and where they are made
The irreplaceable added ingredient

5 The Italian lifestyle

We promote authentic products around the world, helping the diffusion of the Italian know-how
Quality, flavour and beauty: the whole world is jealous of the Italian lifestyle

6 Teamwork

We work together with institutions, private and public entities to promote high-quality deli meats in Italy and around the world
We are taking part in a joint project to help make a difference

7 A focus on the future

We are attentive to changes and open to listen to our consumers
We look at the world just like the consumer does

Insieme per la cultura dei salumi

Istituto Valorizzazione Salumi Italiani

A TWO-DAY FULL IMMERSION IN BUSINESS

SUCCESSFUL FEEDBACK FOR THE EXHIBITION THAT TOOK PLACE IN AMSTERDAM ON 21ST-22ND MAY. ESPECIALLY ON THE SMART FORMAT AND THE INCOMING OF HIGH-PROFILE BUYERS. THUMBS UP FOR THE ITA COLLECTIVE. BUT SELECTION CRITERIA COULD BE IMPROVED.

FORMAT/VOTE 9

Two days is the ideal duration. This is, in brief, the most popular comment heard in the aisles of the fair. No chit-chat, lot of business. And many operators were seriously interested. Somebody observes that the exhibition area has become too large throughout the years, forcing everybody to run back and forth, so an extra day would have been appreciated. It is also true, though, that this avoids any time loss and there are already enough elephantine fairs. Another point in favour of this format: no-frills standard spaces of one or two modules. A choice that obliges to cut to the chase.

BUYERS/VOTE 9

It's difficult to find Italian companies complaining in the pavilions of Rai exhibition centre. Buyers crowded the stands, sometimes queueing up without a murmur about the wait for their turn. All the operators of the largest global chains were informed. Whether the contacts will be useful or not still remains to be seen, but the premises were extremely good.

LOGISTICS/VOTE 7

The centre is easily reachable by public transport and has an impeccable inner signage. Only one 'fly in the ointment': a little mishap happened to me. My e-voucher turned out not to be valid because I was registered by the company too, so when I arrived at the 'scan&go', they stopped me and sent me to desk 4, the one dedicated to information. Once there, I explained the situation to a hostess and showed her my business card, hoping to enter the exhibition centre almost immediately. Unlikely, she sent me to desk 1, the one for new registrations. There I found Tanya, another very kind hostess and I explained what happened, again. Neither did she know what to do and asked to another woman, who seemed to be the chief of the hostesses, or at least the chief of those in the area. They muttered for a while, then they shoke their heads and asked me to wait. In the meantime, two other people with the same problem reached the desk. At this moment, the bulky Cisco showed up (maybe the chief of the chiefs of the hostesses?) that finally managed to print my badge. Moral: I lost 20 minutes. Which isn't the best thing in a fair that lasts so short…

'PLASTIC FREE' BADGES/VOTE 9

Just during the fair (on the second day) the EU directive banning single-use plastics was officially approved. Plastic dishes, cutlery and straws will be no longer on sale from 2021. And since it is such a hot topic, Plma too decided to make its own contribution, by eliminating plastic from badges. A small act, we could say. But, after all, something concrete, which our country could emulate too.

ITA COLLECTIVE/VOTE 8

The Ita-Ice Agency did a great job indeed. The exhibitors located in pavilion 1, near the main entrance, were all very happy about it. A little bit less ecstatic, the exhibitors of pavilion 8, which is more peripheral. Selection procedures, instead, should be improved, because now they follow the rule: "Last one in is a rotten egg". One contingency is enough to forget to open the registrations, losing the best places and even being confined in some far-flung corner of the fair. It is no coincidence that many people suggest selecting the exhibitors based on business fields, with a number of reserved places for every sector and adding as a condition for the companies to be specialized in private label. It would be unpleasant to lose an opportunity with Walmart or Tesco just because one doesn't have an adequate production capacity, am I wrong?

GOLDEN FOOD

From left: Andrea Bodini and Marco Paese

GRUPPO BONTERRE

From left: Andrea Panzeri, Alessio Stentarelli and Francesco Muratori

BERETTA

BRAZZALE

Nicola Caprani

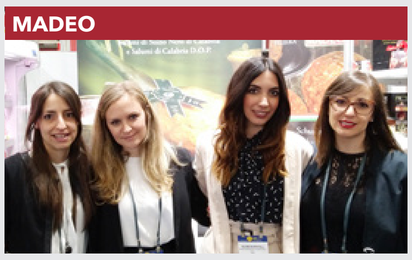
LE FAMIGLIE DEL GUSTO

Costanza Manzini

THE BRIDGE

Eva Pfeffer

MADEO



From left: Francesca Zito, Eleonora Brambilla, Valeria Raspatelli and Anna Madeo

FUMAGALLI

From left: Marina Chiaradia, Arnaldo Santi and Annabelle Zwart

SALUMIFICIO F.LLI RIVA

Giuseppe Riva

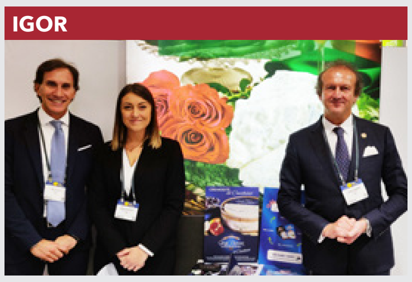
RISERIA VIGNOLA

Giovanni Vignola

ICAM

From left: David Malatesta, Frederic Berchon, Samantha Geroli and Luca Barindelli

IGOR



From left: Paolo Galli, Giulia Leonardi and Fabio Leonardi

INALPI

ITALPIZZA

LAICA

From left: Eugenio Lombardo and Andrea Saini

LATTERIA SORESINA

From left: Gianluca Boschetti, Michele Falzetta and Luigi Ferrari

MASTER

From left: Sabrina Argenti, Adriano Bianco and Alessandro Argento

DEVODIER PROSCIUTTI

Michele Devodier

NUOVA CASTELLI

PASTIFICIO DI BARI - TARALL'ORO

Antonello Di Bari

PFITSCHER

Lukas Pfitscher

RASPINI

Daniela Gagliano and Andrea Celada

ZANETTI

GRUPPO GERMINAL

TERRE DUCALI - PARMA IS

From left: Gianluca Armenzoni and Luca Caselli

SGAMBARO

From left: Federico Gris, Martina Durighello and Pierantonio Sgambaro

VERONI

THE ITALIAN FOOD BREXIT

A STUDY CARRIED OUT BY ISMEA ANALYSES THE CURRENT IMPORT-EXPORT SITUATION FROM ITALY TO UK. WITH A SPECIAL FOCUS ON WINE TRADE. IN ORDER TO PREPARE COMPANIES TO A POSSIBLE 'NO DEAL' SCENARIO.

The Heads of State and Government of the EU-member countries, on 11th April, agreed upon giving six months more to Uk, to let them 'puzzle Brexit out', setting the final deadline of 31st October 2019 for their exit from the EU. The so called 'no deal', the exit of Uk from EU without a trade agreement, is still a distinct possibility and it would cause quite a few commercial backlashes on both sides of the Channel. Italian food processing companies are especially worried by this scenario, since Uk is such a fundamental partner for the Italian food and agricultural export, according to a recent study from Ismea.

Italy, sixth largest supplier for Uk

Uk's trade balance has been in a state of structural deficit of more than 160 million euro in 2018. Food export of Uk translates into 27 billion euro per year (6.6% of the total), which are way less than the 57 billion euros spent for import (10%, mostly agro-industrial products), that is a number growing by 3.9%.

Britain's main commercial partner is EU, which represent 63.8% of food and agricultural export and 73% of import. Italy, sixth largest supplier of Uk, generates a turnover of 3.3 billion euro (in 2018) and registered a 4% annual growth rate between 2009 and 2018. Italy exports a wide range of food and agricultural products: wine bottles - especially sparkling wine -, tomato pulp and peeled tomatoes, bakery products and pastries, aged and fresh cheese, pasta, ceasoned ham, chocolate, coffee, milled and semi-milled rice.

After Brexit, which scenario?

With these conditions, if the Uk leaves the EU without a trade agreement (the so called 'no deal' scenario), the country would have to face serious problems, especially in the research of new commercial partners, since the EU has such a fundamental role in Britain's trade market.

Besides new customs procedures (export certificates, taxation, health regulations and labelling rules), new extra EU duties would cause a generalised increase in food and agricultural consumer price and also a possible progressive reduction in import from the EU members. At the moment, this scenario seems not to affect Italy, which maintains the leadership in food and agricultural export, especially for pasta, rice and tomatoes. Instead, the situation of the wine market is quite different because Commonwealth members (New Zealand and Australia) play a key role in Uk's trade market. In order to have a more detailed analysis we should wait for future changes in duties, taxation, technical barriers and bilateral commercial agreements.

La Brexit dell'agroalimentare italiano

Lo scorso 11 aprile, i capi di Stato e di governo dei Paesi membri Ue hanno concordato di concedere al Regno Unito altri sei mesi di tempo per 'sbrogliare la matassa' Brexit, fissando al 31 ottobre 2019 il nuovo termine ultimo per l'uscita del Paese dall'Unione. Un'analisi Ismea prende in esame l'attuale situazione di import-export dal Bel Paese verso il Regno Unito. Con un focus particolare sul mercato enologico. Per preparare le aziende a un eventuale scenario 'no deal'.

WINE MARKET: PRESENT AND FUTURE

Uk represents one of the most important markets for Italian wine export: as a matter of fact, it ranks first as destination for sparkling wines exported from Italy (30% of the total), and third, after the Usa and Germany, for other wine bottles (9% of the total). More specifically, Italian wine export gained more than 6.2 billion euro in 2018, with a +3.3% compared to 2017. It also registered a 77% increase during the 2009-2018 decade, which means 2.7 billion euro. Again in 2018, wine bottles and sparkling wine had the best results and they accounted respectively for 68% and 24% of total export. Italian wines sold in Britain generated a turnover of 827 million euro in 2018 (+1.9% compared to 2017 and +79% to 2009), or 13% of total wine export from Italy. Wine bottles in particular represent 44% of Britain's import in 2018, or 365 million euro, which however highlights a 2.3% decrease compared to 2018 and a 7.6% compared to 2009.
Sparkling wines (including Prosecco) still have a leading position and register a 50% export share, growing by 389 million euro between 2009 and 2018.
According to the Ismea analysis (statistics of 2017), 80% of wine bottles intended for Uk come from five regions: Veneto, Piedmont, Trentino Alto Adige, Tuscany and Lombardy. However, sparkling wines come mostly from Veneto (75%) and Piedmont (18%), which means 93% of export.
Uk is one of the main purchasers of made in Italy wine (9% of the total) and it is the first partner for Piedmont, Trentino Alto Adige e Lombardy, the fourth for Veneto and the fifth for Tuscany. Uk is also the most important target market of Italian sparkling wine: 30% of Italian export (a third of the total), before Usa and Germany.
The regions which export the biggest quantity of sparkling wine are Veneto and Piedmont, whether internationally (respectively 59% and 22%) or in the Uk (75% and 18%). In particular, Veneto gained 806 million euro in 2018, 38% of them (306 million euro) from Uk only. Export from Piedmont, instead, generated 304 million euro, 25% from Uk.

follow

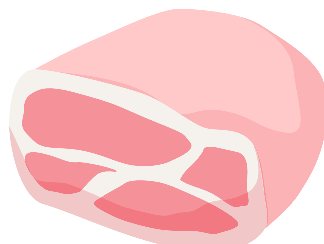
UK'S FOOD AND AGRICULTURAL TRADE BALANCE (€ MILLION)

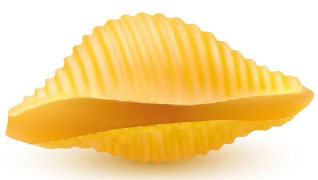
	2009	2008	Average annual change % 2009-2018
EXPORT			
Total	**257.857**	**409.798**	**5,3%**
Food and agricultural:	17.281	26.970	5,1%
- Eu 28	11.275	17.208	4,8%
Other countries	6.006	9.762	5,5%
Total food and agricultural share	6,7%	6,6%	-
Eu 28	65,2%	63,8%	-
Other countries	34,8%	36,2%	-
IMPORT			
Total	**395.834**	**569.956**	**4,1%**
Food and agricultural:	40.664	57.158	3,9%
- Eu 28	27.004	41.739	5,0%
- Other countries	13.661	15.419	1,4%
Total food and agricultural share	10,3%	10,0%	-
Eu 28	66,4%	73,0%	-
Other countries	33,6%	27,0%	-
BALANCE			**ABSOLUTE CHANGE 2018/2009**
Total	**-137.977**	**-160.158**	**-22.181**
Food and agricultural:	-23.383	-30.188	-6.805
- Eu 28	-15.728	-24.531	-8.803
- Other countries	-7.655	-5.657	1.998

Source: ISMEA elaboration on COMTRADE data (db ITC)

UK'S FOOD AND AGRICULTURAL IMPORT FROM ITALY PER PRODUCT (€ MILLION)

HS6 codes		2009	2018	Average annual change % 2009-2018	Change % 2018/2009
HS6 codes	Food and agricultural	2.285	3.261	4,0%	42,7%
'220421	Wine sold in <=2 litre bottles	384	379	-0,1%	-1,3%
'220410	Sparkling wine	31	336	30,1%	968,6%
'200210	Peeled tomatoes and tomato pulp	169	150	-1,3%	-11,2%
'040690	Aged cheese	81	123	4,7%	51,5%
'190590	Bakery products and pastries	42	89	8,7%	112,6%
'190219	Food dough	64	73	1,5%	14,6%
'190220	Stuffed pasta	67	70	0,5%	4,5%
'180690	Chocolate and other foods that contain cocoa	53	85	5,3%	59,4%
'190230	Cooked food dough	84	68	-2,4%	-19,7%
'040610	Fresh cheese	38	65	6,2%	71,3%
'200551	Beans, ready or preserved	35	62	6,6%	77,2%
'220300	Malt beer	45	58	2,7%	27,0%
'090121	Coffee, roasted (with caffeine)	26	55	8,6%	109,4%
'210390	Ready sauces	45	54	2,0%	20,0%
'160100	Sausages, salami and similar products	30	52	6,4%	74,1%
'021019	Prosciutto (raw)	36	51	4,0%	42,0%
'100630	Milled/semi-milled rice	68	46	-4,1%	-31,2%
'150910	Virgin olive oil	41	46	1,1%	10,6%
'220870	Liquors	35	43	2,3%	22,3%
'220890	Ethyl alcohol	17	43	10,5%	146,5%
'200290	Tomatoes, sauces and paste	45	39	-1,5%	-13,0%
'190211	Egg food dough	34	34	0,0%	0,2%
'210500	Ice cream	14	31	9,6%	127,8%
'040620	Grated cheese	22	27	2,0%	19,5%
'080810	Fresh apples	24	26	0,9%	8,6%
'160241	Prosciutto (cooked)	20	26	2,9%	29,4%
'210320	Ketchup and other tomatoe sauces	14	25	6,5%	75,8%
'210410	Soup or broth preparations	8	24	13,0%	200,2%
'080610	Fresh grapes	10	22	8,4%	106,5%
	Other products [1]	700	1.058	4,7%	51,3%





1) less than €20million turnover in 2018

Source: ISMEA elaboration on COMTRADE data (db ITC)

RANKING OF THE MOST IMPORTED ITALIAN FOODS IN UK

Ranking, million euro and % of the largest supplier countries of 2018

Uk import	2009 import (€ million)	2018 import (€ million)	I	II	III	IV	V	VI	VII
Food and agricultural	40.664	57.158	Netherlands 7,83 billion € -(13,7%)	Ireland 5,55 billion € (9,7%)	France 5,33 billion € (9,3%)	Germany 5,20 billion € (9,1%)	Spain 3,2 billion € (6,7%)	**Italy 3,26 billion € (5,7%)**	Belgium 2.,2 billion € (5,1%)
Wine bottles	2.703	2.188	France 658 million € (30,1%)	**Italy 379 million € (17,3%)**	Spain 220 million € (10,0%)	New Zealand 179 million € (8,2%)	Chile 155 million € (7,1%)	Germany 124 million € (5,7%)	Australia 112 million € (5,1%)
Bakery products and pastries	1.025	1.533	France 337 million € (20,0%)	Germany 256 million € (16,7%)	Ireland 210 million € (13,7%)	Belgium 168 million € (10,9%)	Netherlands 100 million € (6,5%)	**Italy 89 million € (5,8%)**	Spain 84 million € (5,5%)
Aged cheese	837	1.046	Ireland 350 million € (33,5%)	France 151 million € (14,4%)	Netherlands 127 million € (12,2%)	**Italy 123 million € (11,7%)**	Cyprus 88 million € (8,4%)	Germany 61 million € (5,8%)	Greece 57 million € (5,5%)
Chocolate and other foods that contain cocoa	495	897	Germany 262 million € (29,2%)	France 125 million € (14%)	Poland 101 million € (11,3%)	Belgium 100 million € (11,1%)	**Italy 85 million € (9,5%)**	Netherlands 64 million € (7,1%)	Ireland 56 million € (6,2%)
Sparkling wine (including Prosecco)	515	715	**Italy 336 million € (47,0%)**	France 23 million € (45,1%)	Spain 29 million € (4,1%)	Germany 7 million € (0,9%)	South Africa 3 million € (0,5%)	Switzerland 3 million € (0,5%)	Belgium 3 million € (0,4%)
Prosciutto (raw)	777	515	Netherlands 220 million € (42,8%)	Denmark 123 million € (24,0%)	Germany 64 million € (12,4%)	**Italy 51 million € (10,0%)**	Ireland 48 million € (9,4%)	France 4 million € (0,7%)	Spain 3 million € (0,6%)
Sausages, salami and similar products	306	497	Germany 182 million € (36,6%)	Spain 69 million € (14,0%)	**Italy 52 million € (10,5%)**	Ireland 49 million € (9,9%)	Poland 40 million € (8,0%)	Denmark 35 million € (7,0%)	Netherlands 30 million € (6,0%)
Fresh cheese	297	471	Denmark 118 million € (25,1%)	Germany 112 million € (23,8%)	France 76 million € (16,2%)	**Italy 65 million € (13,9%)**	Belgium 35 million € (7,5%)	Ireland 32 million € (4,9%)	Netherlands 18 million € (3,9%)
Roasted coffee	172	395	France 10 million € (27,9%)	Germany 106 million € (26,7%)	**Italy 55 million € (13,8%)**	Netherlands 38 million € (9,6%)	Spain 28 million € (7,0%)	Ireland 21 million € (5,4%)	Belgium 11 million € (2,8%)
Peeled tomatoes and tomato pulp	225	211	**Italy 150 million € (71,2%)**	Spain 12 million € (5,6%)	Germany 11 million € (5,2%)	France 11 million € (5,1%)	Portugal 9 million € (4,3%)	Greece 6 million € (2,9%)	Turkey 4 million € (2,1)
Milled/semi-milled rice	186	192	**Italy 46 million € (24,2%)**	Thailand 24 million € (12,4%)	Netherlands 23 million € (12,3%)	Spain 22 million € (11,3%)	India 21 million € (11,2%)	Pakistan 15 million € (8,1%)	Cambodia 10 million € (5,2%)
Virgin olive oil	104	146	Spain 74 million € (51,1%)	**Italy 46 million € (31,4%)**	Belgium 6,1 million € (4,2%)	Greece 5,8 million € (4,0%)	France 5,5 million € (3,8%)	Germany 5,3 million € (3,6%)	Palestine 0,7 million € (0,5%)
Stuffed pasta	91	110	**Italy 70 million € (63,5%)**	France 11 million € (10,1%)	Germany 5,4 million € (4,9%)	Belgium 5,0 million € (4,5%)	Vietnam 3,5 million € (3,2%)	Ireland 2,9 million € (2,7%)	Thailand 2,9 million € (2,6%)
Semolina pasta	81	106	**Italy 73 million € (69,3%)**	Germany 11 million € (10,4%)	Belgium 7 million € (6,4%)	Greece 1,5 million € (1,4%)	China 1,4 million € (1,4%)	Ghana 1,4 million € (1,3%)	Turkey 1,3 billion € (1,3%)

Source: ISMEA elaboration on ISTAT data

ITALIAN WINE EXPORT TO UK (€ MILLION)

	2008	2009	2017	2018	2018 share	Absolute change 2018/09
Wine	**505**	**463**	**812**	**827**	**100%**	**365**
Grape must	4	3	1	1	0%	-2
Bulk wine	21	19	18	19	2%	-1
Wine sold in <=2 litre bottles	403	395	374	365	44%	-30
Sparkling wine	78	45	410	435	53%	389

Source: ISMEA elaboration on ISTAT data

end

A 100 BILLION-DOLLAR BUSINESS

GLOBAL SALES SET A NEW, IMPRESSIVE RECORD IN 2018. WITH A 6% INCREASE OVER PREVIOUS YEAR. NORTH AMERICA AND EUROPE ARE MARKET LEADERS. THE KEY FINDINGS OF AN ECOVIA INTELLIGENCE'S STUDY.

Worldwide organic food and drink sales surpassed the 100 billion-dollar threshold for the first time in 2018, up by 6%, as highlighted in a new report by the London-based research, consulting & training company Ecovia Intelligence - formerly known as Organic Monitor.

Taking a historic perspective, organic is a major success story in the sustainable products industry. Organic products were first introduced in the 1990s. Retail sales increased from a few billion dollars to 18 billion in 2000, 59 billion in 2010, and now over 100 billion. Nevertheless, in spite of this meteoric growth, the market share of organic foods remains below 1% in countries outside Europe and North America.

Where does growth come from?

The largest markets for organic products are in North America and Europe, since the combined revenue share of these two regions is 90%. Although sales remain concentrated in the 'western world', the share has declined from 97% in 2005. A number of countries with a strong tradition of exporting organic crops are now developing strong internal markets; these countries include China, India, and Brazil.

In terms of country markets, the US has the largest market for organic food & drink, comprising about 45% of global sales. The German, French, Italian and Canadian markets are the next largest. In terms of market share, Denmark leads with almost 14% share of retail food sales. The highest spenders of organic products are in Switzerland, Denmark, Sweden and Austria.

Sales are booming in retail & foodservice alike

Rising consumer awareness of organic products and widening availability are two major drivers of global growth. Distribution of organic foods is increasing in supermarkets, discounters, drugstores, pharmacies, as well as the catering and foodservice sector.

Organic ingredients are being used in a growing number of European and North American foodservice establishments. Chained outlets - including McDonald's and Pret a Manger - are also making commitments to organic product sourcing.

Retailer private labels are wielding great influence in the organic food industry. All leading food retailers in North America and Europe are marketing organic foods under private labels. One successful example is Coop Switzerland with its Naturaplan brand: housing 2,500 products, it accounts for over 40% of organic food sales in the country. It is one of a growing number of retailer private labels that generate over 1 billion dollar sales.

The sector's future challenges

According to Mr. Amarjit Sahota, founder of Ecovia Intelligence, the organic sector is going to face many important challenges in the near future.

The first is demand concentration: organic agriculture is now practiced in 181 countries, however the bulk of sales are from the affluent countries.

Second, organic is perceived as a rich man's luxury in many parts of the world. Another challenge is the growing number of national and private organic standards: outside the major 'organic trading blocs', there is no harmonisation of organic standards and very few equivalency agreements.

Organic remains the premier and dominant eco-label in the food industry, however adoption rates for many agricultural commodities are lagging. For instance, over a quarter of all coffee and cocoa grown is now certified according to a sustainability scheme. Organic's share has been overtaken by other schemes, such as Fairtrade, UTZ Certified and Rainforest Alliance. The challenge is to maintain organic's pole position in an increasing 'labelised' food industry.

Federica Bartesaghi

Bio: un business da 100 milioni di dollari

Le vendite mondiali di prodotti alimentari e bevande biologici superano per la prima volta, nel 2018, la soglia record di 100 miliardi di dollari, mettendo a segno una crescita del 6% sull'anno precedente. Un mercato in cui Europa e Stati Uniti fanno la parte del leone, con un'incidenza sul totale che tocca il 90%. L'analisi di un report firmato Ecovia Intelligence.


LEVONI
ORGOGLIOSAMENTE BUONI
The good well made.
For our *salumeria* we only use 100% Made in Italy meats, spices freshly grounded upon processing and natural flavours. Salami are still hand tied, smoking is the result of an exclusive blend of mountain woods, and all our recipes are gluten-free and lactose-free. “Good and well made” is the principle we never relinquish.
TUTTO MADE IN ITALY
I SALUMI LEVONI SONO NATI E ALLEVATI IN ITALIA
WE WILL BE AT SUMMER FANCY FOOD SHOW 2019
LEVEL 3 - STAND 2668
levoni.it

FAR EAST: THE NEW WINE FRONTIER

STRATEGIC END MARKET ON A GLOBAL SCALE, WITH IMPORTS TOTALLING 6.45 BILLION EURO, CLOSE BEHIND NORTH AMERICA. THE FINDINGS OF THE VINITALY-NOMISMA WINE MONITOR OBSERVATORY.

The global demand for wine in the Far East translates into 6.45 billion euro of imports and is very close behind North American (Canada and the US), at 6.95 billion euro. In the 'wine rush', the Far East is challenging itself and leapt by 227% in the last decade (with a 12.6% annual growth rate): 11 times more than the European markets and almost 4 times more than the North American geo-economic area. This is what emerged from the study "Asia: the long journey of the Italian wine", developed by the Vinitaly Observatory-Nomisma Wine Monitor and presented during the 53rd Vinitaly (Verona, 7-10 April). According to the research, Asia is becoming keener on wine, working in particular with France and - today more than ever before - the 'new' productive world - namely Australia and Chile - which benefit from a favourable tax policy in some countries.

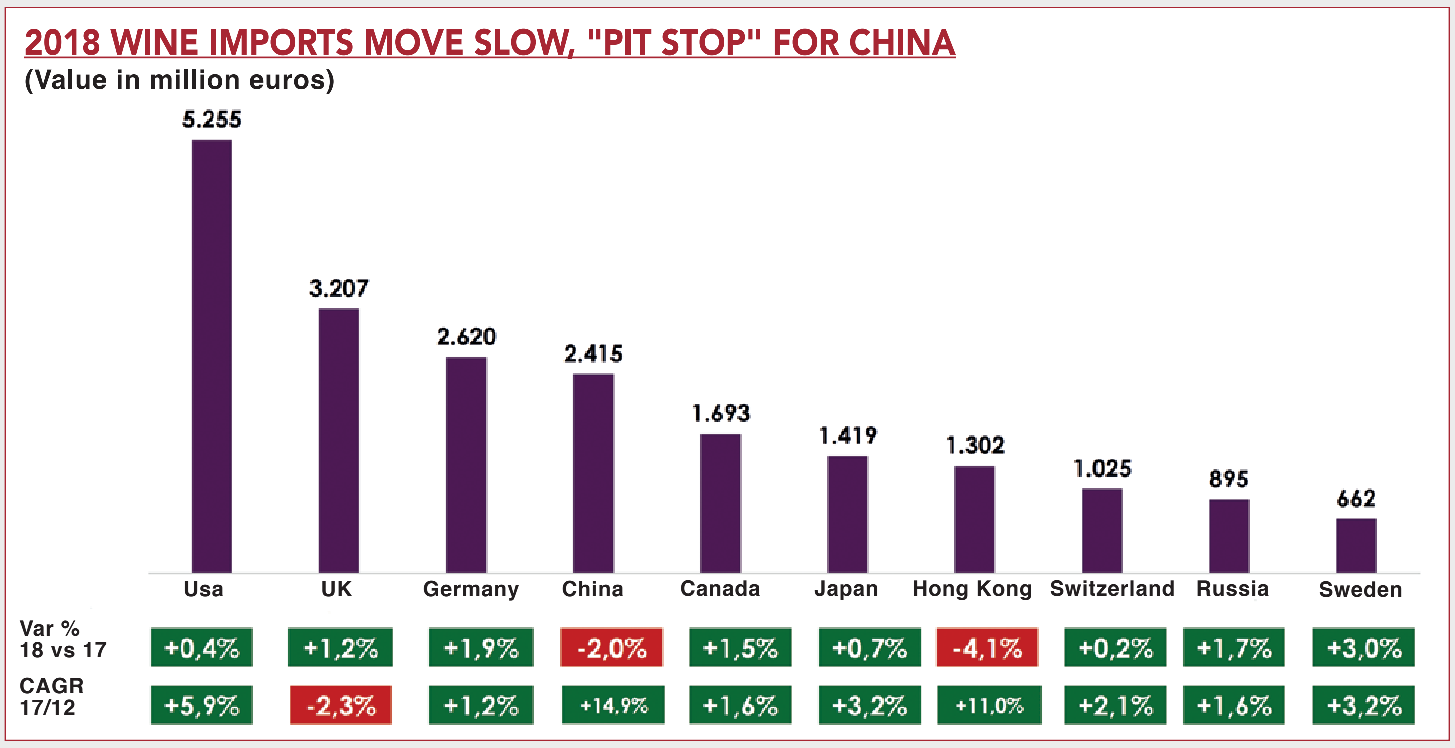
What about Italy?

The study shows that despite the positive trend of the Italian wine system (+3.3% in 2018 over previous year), its presence in the Asian market is still marginal if compared to its real potential. Out of the 6.45 billion euro of imports made last year in China, Japan, Hong Kong (but also Vietnam, Taiwan, Thailand, Philippines, Singapore and others), France - although decreasing - collects the 50.2% of the money coming from the Asian market, or 3.24 billion euro. The Italian market share stops at 6.5% (419 million euro), even less than Australia (15.9%, or one million euro) and Chile (8.9%).

According to the analysis carried out by the Nomisma-Wine Monitor manager, Denis Pantini, Italy has certainly increased its sales, but less than its competitors: Italian growth in China in the last 5 years nearly reached 80% while the imports from the world increased by 106%. The same happened in Hong Kong (+28% vs +67%) and South Korea (+36% vs +60%) and especially in Japan - the most Italy-friendly market in Asia - where Italy could not register more than +3.4% although the demand grew up by more than 30%. In terms of bottles, Far East imported almost 93 million bottles of Bordeaux (and 6 million of Burgundy) in 2018, while the sales of PDO red wines from Tuscany, Piedmont and Veneto together amount to little more than 13 million bottles. This results in a 11 to 1 worth of value: 864 million euro made just by Bordeaux wine compared to 77 million euro of PDO red wines of the three Italian regions together. The future is expected to be positive for Italy, with an annual growth rate for the next five years of up to 8% in China, between 1% and 2.5% in Japan - thanks to the economic agreement - between 5.5% and 7.5% in South Korea and between 3% and 4.5% in Hong Kong.

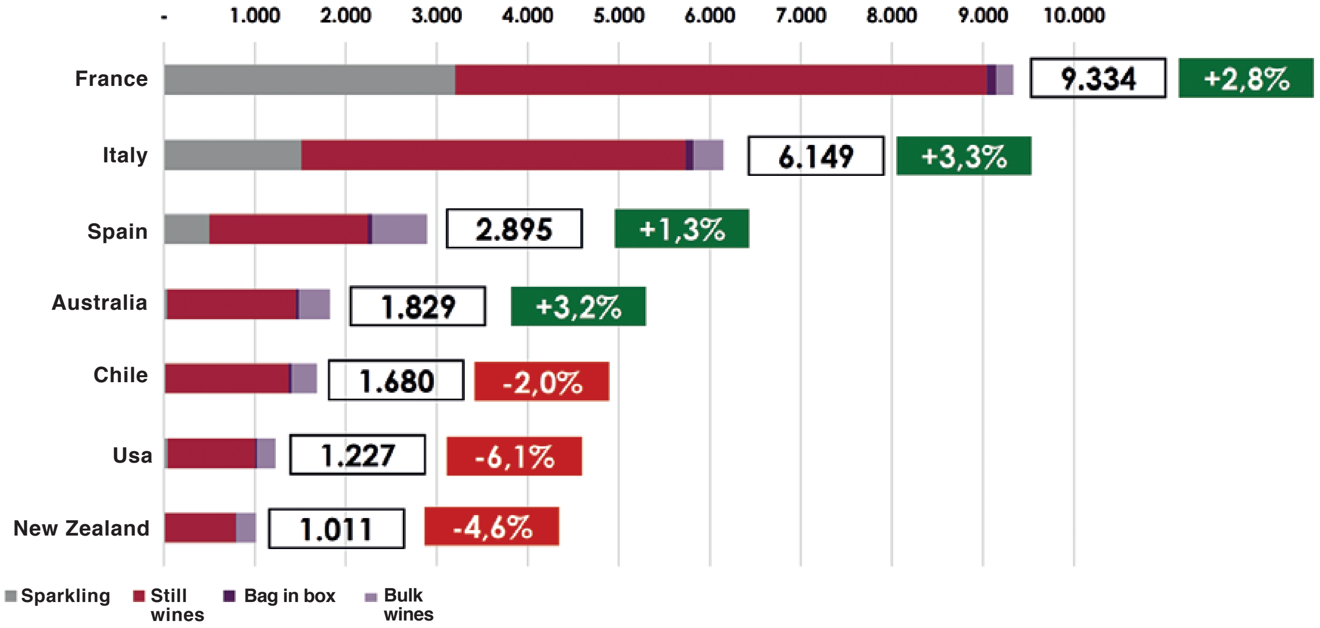
Far East: la nuova frontiera del vino

Sempre più strategico il ruolo della regione per il business enologico mondiale, con le importazioni che salgono a 6,45 miliardi di euro - in crescita del 227% nell'ultimo decennio - colmando quasi interamente il gap con il primo importatore mondiale di vino: gli Usa (6,95 miliardi). È quanto emerge dall'Osservatorio Vinitaly-Nomisma Wine Monitor, che evidenzia anche come la presenza italiana in Asia risulti ancora troppo marginale rispetto alle potenzialità del comparto, con una quota di mercato ferma al 6,5%.



2018: FRANCE IS THE EXPORT LEADER, ITALY STILL AT THE SECOND PLACE

(Wine export according to type, million euro and global variation of 2018 vs 2017)



2008-2018: WINE IMPORTS VARIATION ACCORDING TO GEO-ECONOMIC AREA

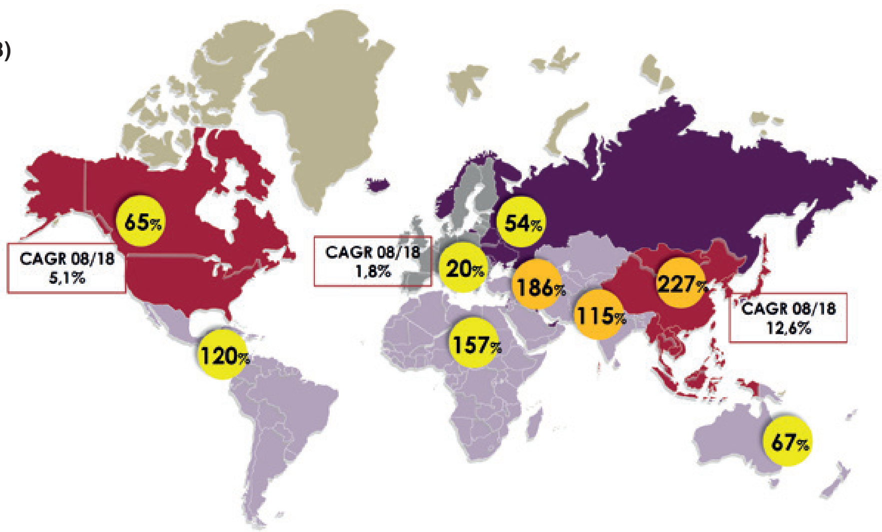
(% on values)

GEO-ECONOMIC AREAS
(Global wine imports, million euro, 2018)

1)	EU 28	(13.300)
2)	North America	(6.950)
3)	Far East	(6.450)
4)	Extra- EU Europe	(2.500)
5)	Latin and South America	(850)
6)	Oceania	(700)
7)	Africa	(400)
8)	Central Asia	(70)
9)	Middle East	(50)
	WORLD TOTAL	(31.270)

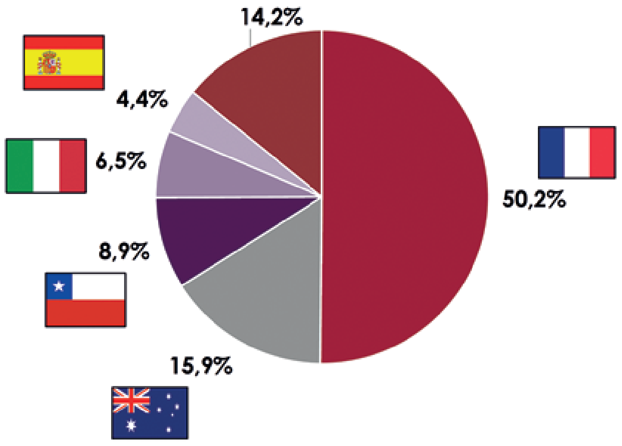
IMPORTS FOR AREA (EURO)

- More than 13 billion
- 6-7 billion
- 2-3 billion
- less than 1 billion



FAR EAST: HALF OF THE GLOBAL WINE IMPORTS IN THE AREA COMES FROM FRANCE

(% share of the global wine import in value per country)



Far East - Global Imports
6.450 MILLION EUROS

FAR EAST & RED WINES: THE MOST EXPORTED PDOs

(2018, comparison in exports of PDO red wines in the leading markets of Far East, thousand bottles*)

					Far East total (million euro)
Bordeaux	55.812,1	16.749,5	9.746,6	2.198,0	863,5
Burgundy	1.155,5	3.068,8	627,0	277,0	153,7
Tuscany	2.396,7	3.216,6	341,3	451,1	39,7
Rioja	5.419,2	795,2	358,7	513,5	33,9
Piedmont	1.136,7	1.060,9	151,4	306,1	23,1
Veneto	1.603,7	545,2	87,8	167,4	13,9

(* 0.75 lt size)

Source: Vinitaly - Nomisma Wine Monitor Observatory

THE HUNGER OF THAIS FOR READY-TO-EAT

THE LOCAL FOOD INDUSTRY IS THE COUNTRY'S THIRD LARGEST, CONTRIBUTING 23% TO GDP. EXPORTS GREW BY 7.3% IN 2018, EXCEEDING 32 BILLION DOLLARS. BUT IMPORTS ARE RISING TOO, ESPECIALLY OF PROCESSED FOOD. THE HIGHLIGHTS OF A SURVEY BY THE USDA'S FOREIGN AGRICULTURAL SERVICE.

Opportunities in Thailand's food processing sector continue to grow, as domestic sales of processed foods rise due to strong demand from the retail and food service sectors. In particular, Thailand's exposure to international foods has led to significant changes in consumer attitudes and consumption patterns. Moreover, the rapid urbanization and the growing number of women in the workforce have increased demand for processed foods and ready-to-eat-meals. Frozen food products, particularly frozen meals, desserts, and seafood, show the biggest growth. As a result, many retail food outlets are increasing their product lines of ready-to-eat food products, determining a strong increase in the import of food ingredients that are not locally available.

The change in the customer behavior based on health and beauty concerns as well as an increasing aging society, are factors that food manufacturers should take into consideration when developing new products to align with consumer needs. The e-commerce market and online market have started to play a key role and have been integrated into existing offline stores, as a faster and more convenient channel of purchasing and payment, to deliver good and impressive experience to customers. The findings of a report issued by the USDA's Foreign Agricultural Service (FAS) of the United States on the past February.

Thailand's processing industry

Thailand's food processing industry has developed fast and is one of the most developed in South East Asia, with more than 10,000 food and beverage processing factories. It is the country's third largest industry, contributing 23% to the country's Gross Domestic Product (GDP). Most food processors are small-to-medium size and predominantly serve the domestic market. However, there are many medium-to-large food processors that produce higher-value products for domestic and export markets. Main products include frozen shrimp, sugar, poultry, canned tuna, confectionery, snacks, canned pineapple and tapioca. In addition, Thailand exports halal products worth 6 billion dollar to more than 57 countries, making the country the world's ninth-largest halal food exporter. The main Thai processed food export markets are Japan, the United States and the EU. According to the National Food Institute, Thai exports grew by 7.3% in 2018 to total 32.2 billion dollars. The Thai seafood sector is the third largest in the world, after China and Norway, with 90% of output exported.

L'appetito dei Thailandesi per i ready-to-eat

Quello agroalimentare è il terzo maggior distretto industriale thailandese, la cui incidenza sul Pil del Paese si attesta al 23%. Nel 2018, le esportazioni hanno fattor registrare una crescita del 7,3%, a oltre 32 miliardi di dollari, ma anche le importazioni sono in deciso rialzo. Merito, in particolare, di un forte incremento nella richiesta di prodotti alimentari processati e ready-to-eat, capaci di rispondere alle esigenze di una popolazione sempre più moderna e urbanizzata. I risultati di un'analisi di mercato realizzata dal Foreign Agricultural Service, l'ufficio per le relazioni estere della Usda statunitense.

LOCAL TRENDS IN FOOD

- **HEALTH FOODS** (organic, natural derived, clean foods, healthy snacks)
- **HEALTH BEVERAGES** (natural ingredients, functional drinks)
- **READY-TO-EAT FOODS**
- **FROZEN MEALS**
- **HALAL FOODS**
- **FOOD FOR AGING POPULATIONS**
- **ORGANIC & VEGETARIAN FOODS**
- **PLANT PROTEIN-BASED PRODUCTS**
- **PROCESSED SEAFOOD**
- **FOOD DELIVERY**

follow

FORMAGGI® della FAMIGLIA
BUSTI
FAUGLIA PISA ITALIA

Remo Busti tells how in **Garfagnana** in the early 1900s it was common practice to combine **different kinds of milk**, so people made a virtue of necessity and used to produce cheeses with the **milk of animals** which shared the same stable, as **sheeps**, **cows** and **goats**. In order to bring back this tradition, we created the **special recipe** of the **Tre Latti Lari with vegetable rennet**. The **perfect balance** of the three milk types gives the cheese peculiar and **unique organoleptic characteristics**.

After a **first maturation of at least 60** days in our dairy plant, the cheese is **transferred in the ancient tufaceous cave** in the locality of **Lari**, a medieval village which gives it its name. The cheese will remain in the cave for at **least 90** days, under totally natural temperature and humidity. After refining, the Tre Latti is treated in crust with vegetable charcoal which gives it an elegant black garment.

The use of **vegetable rennet** (extract from the thistle flower) makes this cheese suitable also for those who follow a vegetarian diet.

PRODUCTS PRESENT IN THE MARKET WHICH HAVE GOOD SALES POTENTIAL

- A growing aging population has increased demand for healthy and functional food ingredients including dried fruits, nuts, pulses, plant-based proteins, proteins and amino acids, vitamins, minerals, prebiotics and dietary fiber, probiotics, carotenoids, essential oils, omega-3 and 6 fatty acids. Also growing demand for organic ingredients, gluten free, plant-based ingredients, and protein boost food ingredients.
- Bakery (both premium and mass market) ingredients including wheat flour, bread improver, dough blend, wheat flour, milk and cream, butter, cheese, dried fruits, potato starch, nuts, pastry fillings, sugar, colors & flavors, etc.
- Emulsifying, foaming, stabilizing and thickening agents. These products are used in frozen foods, bakery products, ice cream, evaporated milk and confectionery products.
- Colors and flavors. These products are used in non-alcohol beverages, ice cream and other dairy products, confectionery products, snack foods, bakery, instant noodles and a wide range of processed meats.
- Sweeteners which are used in non-alcohol beverages and the confectionery industry. Beverage manufacturers are reducing sugar content to minimize the impact from new excise tax.
- Concentrated fruit juice due to growing demand for new flavors.
- Fish fillets for processed seafood, frozen food, and ready-to-eat products.

PRODUCTS NOT PRESENT IN MARKET WITH GOOD SALES POTENTIAL

Products that can be substituted for traditional ingredients such as preservative-free ingredients that provide extended shelf life and nutrient/functional ingredients. Thai consumers prefer foods that are flavor-intensive, palate-pleasing and healthy.

PRODUCTS NOT PRESENT BECAUSE THEY FACE SIGNIFICANT BARRIERS

Pork products, chicken, and novel ingredients that have a history of use less than five years.

THAILAND'S IMPORTS OF CONSUMER-ORIENTED PRODUCTS, 2018

Source: USDA

DOMESTIC FOOD PRODUCT SALES 2018

Products	Unit	2017	2018
Soy sauce	liters	80,305,736	88,072,524
Fish sauce	tons	82,080,884	85,204,860
Sugar	tons	1,568,513	1,558,418
Pasteurized milk	tons	950,952	1,009,484
Frozen & chilled chicken meat	tons	1,766,787	1,792,769
Yoghurt drinks	tons	443,002	446,697
Fruit juice	tons	390,729	386,057
Instant Noodles	tons	214,638	216,506
Ice cream	tons	114,938	114,465
Canned sardines	tons	86,733	66,561
Cake	tons	35,962	38,594
Canned tuna	tons	30,536	28,494
Sausage	tons	29,675	30,658
Wafers	tons	29,990	29,960
Canned pineapple	tons	28,725	29,405
Frozen shrimp	tons	18,894	22,225
Cookies	tons	7,739	7,180
Dried fruit and vegetables	tons	6,229	6,261
Ham	tons	3,162	2,962

Source: The Office of Industrial Economics

THAILAND'S MAJOR AGRICULTURAL PRODUCT IMPORTS 2017-2018

(Million U.S. Dollar)

Products	2017	2018
Fish and products	3,688	4,020
Food crops and products	1,530	1,660
Residues and waste, prepared animal fodder	1,854	2,226
Oil plants	1,294	1,269
Fruits and products	1,084	1,034
Other food products	722	813
Vegetables and products	585	738
Milk and products	606	630
Meat products	520	547
Beverages	351	449
Other agricultural products	2,118	2,057
Total	**14,351**	**15,443**

Source: Office of Agricultural Ecomonics, Ministry of Agriculture and Cooperatives

THAILAND'S MAJOR AGRICULTURAL PRODUCT EXPORTS 2017-2018

(Million U.S. Dollar)

Products	2017	2018
Fish and products	6,221	6,306
Rice and products	5,709	6,171
Meat products	4,057	4,684
Fruits and products	4,213	3,207
Sugar and products	3,005	2,988
Cassava and products	2,143	2,290
Beverages	1,521	1,728
Vegetables and products	842	899
Residues and waste, prepared animal fodder	647	613
Dairy products	305	340
Other agricultural products	4,552	4.922
Total	**33,216**	**34,148**

Source: Office of Agricultural Ecomonics, Ministry of Agriculture and Cooperatives

SALES OF PACKAGED FOOD BY SECTOR 2014-2018

(Million U.S. Dollar)

Products	2014	2015	2016	2017	2018
Baby food	805	790	798	867	931
Baked Goods	735	754	787	882	983
Breakfast Cereals	56	57	61	70	76
Confectionery	641	645	657	714	771
Dairy	2,522	2,539	2,612	2,868	3,168
Edible Oils	586	568	567	610	659
Ice Cream and Frozen Desserts	382	392	418	458	513
Processed Fruit and Vegetables	59	58	58	62	66
Processed Meat and Seafood	470	484	511	577	648
Ready Meals	368	388	416	474	541
Rice, pasta and Noodles	1,576	1,546	1,552	1,680	1,811
Sauces, Dressings and Condiments	1,103	1,103	1,131	1,243	1,355
Savoury Snacks	1,010	1,043	1,106	1,243	1,359
Soup	11	11	10	11	12
Sweet Biscuits, Snack Bars and Fruit Snacks	313	316	328	363	406
Total	**10,636**	**10,693**	**11,013**	**12,122**	**13,300**

Source: Euromonitor

MAJOR SEGMENTS
IN THE FOOD PROCESSING INDUSTRY

Functional and milk alternative beverages

The functional beverage market in Thailand was estimated at 1.7 billion dollars in 2018. Nut-based milk is seen as a strong candidate for growth in term of popularity due to factors such as the relevant health benefits and taste advantages. Consumers are likely to choose organic foods and drinks or clean foods or foods with less processing and more natural ingredients. Examples are sport drinks targeting to consumers who enjoy exercising that present their natural derived ingredients from special geographic sources and health beneficial minerals such as potassium and magnesium, and high protein drinks made from imported pea protein that also highlights health beneficial nutrients such as calcium, L-carnitine and vitamin B1.

Processed seafood

The processed seafood market in Thailand was estimated at 373 million dollars in 2018. The seafood processors produce and export a variety of products, from basic raw frozen products to value-added products. The canning processors mainly use tuna, sardines, and mackerel as well as other processed seafood products made from salmon, cuttlefish/squid, and pollock. The growing awareness of healthy nutritional requirements of children, health conscious consumers, and senior target groups as well as have made this market growth to be promising and the sales expected to reach 570 million dollars in 2023.

Ice cream

Thailand's ice cream market totaled 494 million dollars in 2018. The combined market share of the three leading manufacturers (Unilever Thai, Nestle, and F&N Dairies) is over 80%. There are ample opportunities for the ice cream market to grow in Thailand as ice cream consumption per capita is only 2 liters. Most ice-cream manufacturers are investing in product research and adding new ingredients to ice cream, to market it as low fat or containing healthy ingredients.

Sweet and savory snacks

Demand for sweet and savory snacks in Thailand has continued to grow driven by aggressive advertising and marketing activities. Thailand's market for sweet and savory snacks totaled U.S. 1.1 billion dollars in 2018, with a growth rate of 5.%. The snack market is divided into potato snacks (35.1%), extruded snacks (29.8%), nuts (13.3%), fish snacks (8.4%), cuttlefish snacks (5%), prawn crackers (3.9%), rice crackers (3.8%), and popcorn (0.7%). Per capita annual snack consumption is 1.39 kilograms. The snack industry is highly competitive. New plant-based snacks using ingredients such as mushrooms, vegetables, and tofu are introduced to the market to cater consumers who demand healthier snacks. Thai consumers have moved towards healthier snack products over the past couple of years, thus, many manufacturers invest in research and development, source new food ingredients, and reformulate their products to reduce the salt, sugar and fat content of their products.

Bakery

President Bakery is the leading baking company in Thailand. White bread remains the most popular bread type in the country, followed by whole wheat and multi grain bread. Other major bakery companies include Cpram, C&W Company, S.T. Bakery, and Cubic. The bread sector is a mature market and faces growing competition from other breakfast and lunch food products. Major ingredients include wheat flour, fat (shortening and butter), flour mixes, dried fruits, and fillings. Thai bakery processors mainly use locally available raw materials and import specialty ingredients that cannot be sourced domestically. Sales of bakery products grew by 5% to reach 870 million dollars in 2018.

Fruit and vegetable juices

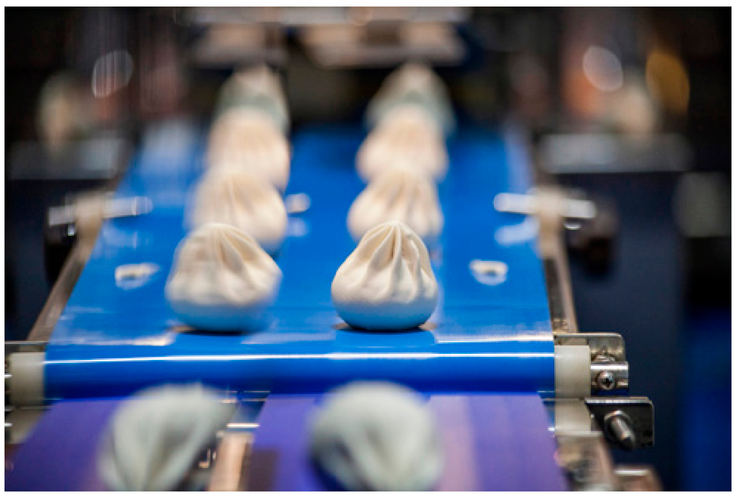
The market value of Thailand's ready-to-drink fruit and vegetable juices was 340 million dollars in 2018. The leading juice manufacturers include Tipco, Malee, Unif, and Doikham. The premium market segment includes both UHT and pasteurized beverages with 2018 sales of 125 million dollars for 58 million liters. The average annual consumption of fruit juice is 4 liters per capita. Orange juice is the most popular flavor followed closely by apple, guava, grape, tomato, and pineapple. Beverages in every sector have high competition, especially in the read-to-drink market. At present, the competition is targeting fruit and vegetables juices and tea that are good for health. An excise tax on the amount of sugar, which became effective in September 2017, impacted the cost of products causing their selling price to be higher.

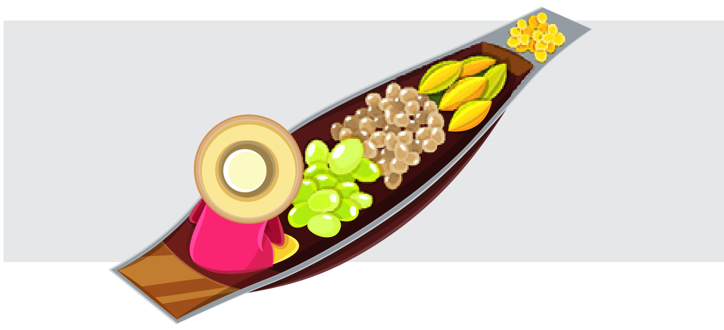
Ready-to-eat products

In 2018, the ready-to-eat market reached sales of 544 million dollars. CP All continues to lead this market with a 42% market share. The company has succeeded by selling ready-to-eat-meals through its 7-Eleven convenience store outlets, which is the category's main distribution channel. The growth rate of the ready-to-cook and ready-to-eat market in 2018 was 10%. With a hurried lifestyle and consumption behavior changing in accordance with the country's population structure, the level of the urbanization, and continuous improvements in the tastes and affordable prices of many products, the market for ready-to-eat products is expanding rapidly in Thailand. As the change in population structure is moving toward an aging society, the food manufacturers have to develop a variety of new products in alignment with these future target consumers' needs.

THAIFEX - WORLD OF FOOD ASIA 2019 CLOSES THE 2019 EDITION

It was held on the past 28 May to 01 June, at the Impact Muang Thong Thani in Bangkok, Thailand, the 16th edition of the largest event dedicated to food and beverage in the region: Thaifex-World of Food Asia. The show was attended by around 2,700 exhibitors from across more than 40 countries with new country entrants including Australia, Brazil, Columbia, Poland, Spain, Sri Lanka, and the United States. According to recent research by Euromonitor International, disposable incomes in the Asia Pacific (Apac) region are projected to grow by 78% over the 2017-2030 period, spurring an explosion of growth in the middle class and a surge in demand for modern products and services. Hence, Apac is set to become the largest consumer of f&b by 2030, creating a huge market potential for established businesses and start-ups in the industry. Against this backdrop of opportunity, Thaifex-World of Food Asia provides a gateway for international businesses keen on entering the region, and a springboard for Asian companies to expand to the rest of the world with its strategic location in Thailand.





end

Innovation is our passion.

We label us as **"fresh ideas"** for many good reasons. We bear innovation into fresh products thanks to new cutting-edge technologies such as high-pressure that assures great flavor, high-quality ingredients and nutritional values. We are always looking for innovative products, also into the world of packaging, to put together flavor and genuineness.

Innovation: it's just natural for us!

parmais.it