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zoom

Cibus Tec: even more international



Figures on the rise for the 2019 edition. The trade show devoted to food and beverage technologies (Parma, October 22nd – 25th) experiences a growth of 25% in exhibition space, of 30% in exhibitors, of 30% in foreign brands. Over 3 thousand top buyers from 70 countries are expected to visit the fair.
on page 16 and 17

LAS VEGAS CONVENTION CENTER - SEPTEMBER 8/11

IBIE 2019 PRODUCT PREVIEW “BREAKING BREAD”

With 1,000 exhibitors and 23,000 attendees, Ibie is about to open its doors. Brand new educational initiatives are scheduled. And ground-breaking features are offered. Focus on sustainability.

from page 8 to page 14

focus Iran

from page 22 to page 24

A major potential market

The third largest country for sales of food processing and packaging machinery in the Middle East provides Italian companies with big business opportunities. Even if price is too often a major concern for local f&b producers. The findings of a survey commissioned by the Italian Trade Agency and Cibus Tec.

the company

TECNO PACK, TECHNOLOGICAL INNOVATION

A renowned specialist in the design and building of complete automatic packaging lines based in Schio, in the province of Vicenza (Veneto).



page 25

insight

page 30

Security: a steep bill for retailers

An overview on losses, threats and solutions to make stores safer. A report of the Università Cattolica of Milan highlights the need of better understanding criminal patterns and combining countermeasures. Focus on the Italian situation and the food sector.

the survey

Unstoppable packaging



With a 7.85 billion euros turnover, the sector proves right to be one of the most dynamic industries in Italy. Food and beverage machines lead sales. Together with exports, which make up 78.9% of the field's income.

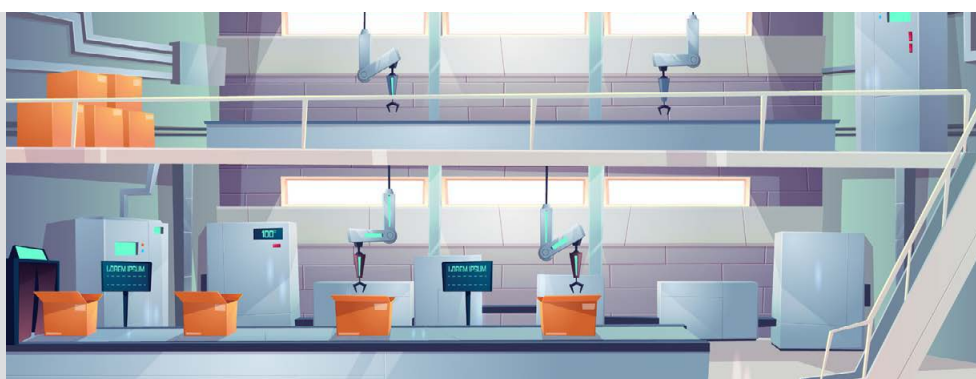
on page 20 and 21

markets & data

on page 18 and 19

Mexico: the packaging speaks Italian

A fast-growing economy, with our country among the most important partners. Here is what came to light from the data presented by Ita on May 23rd in Milan.





Digitalisation, automation, robotics: here lies the future

By Angelo Frigerio

What's the future of the food processing industry? Trends are crystal clear. Digitalisation, as driving force of the sector, puts the smart factory concept under the spotlight. In food processing factories, automated solutions and software make processes and production smarter and more efficient. Safety keeps being a core issue too. Replacing manual activities with automated processes is the goal. For this reason, companies present more and more completely automated solutions for dosing and filling for diverse products by means of positioners and industrial robots. Moreover, in the packaging sector, many smart solutions for food safety have been introduced. Products preservation and sustainability are crucial in this

area. These issues range from energy efficient machinery and production chains to green packaging. Unfortunately, there's a downside: everywhere, a lack in specialised labourers and difficulties in finding young workers are reported. It's a challenge that many machinery manufacturers have to address, often powerless face pressing requests of the processing factories. At this point, politics need to take the floor. So that school – namely, technical schools – can become a proper driving belt of the industry. In the meantime, companies must invest more and more on digitalisation, automation and robotics. Processes that allow to streamline procedures and simplify each step of food processing.

Digitalizzazione, automazione, robotica: il futuro è qui

Qual è il futuro dell'industria che accompagna i processi di trasformazione dei prodotti alimentari? Le tendenze sono chiare e ben delineate. La digitalizzazione, come tema trainante del settore, pone la smart factory al centro dell'attenzione. Soluzioni automatizzate e software rendono la produzione e i processi, negli stabilimenti di lavorazione dell'alimentare, più intelligenti ed efficaci. Anche la sicurezza continua a essere un tema centrale. L'obiettivo è quello di sostituire le attività manuali con processi automatizzati. A tal proposito le aziende presenta-
no sempre più soluzioni com-

pletamente automatizzate per porzionare e posizionare nelle vaschette prodotti fra i più vari tramite posizionatori o robot industriali. Nel settore dedicato al confezionamento sono state presentate inoltre soluzioni intelligenti per proteggere gli alimenti. Molto importanti in questo ambito sono la conservazione delle risorse e la sostenibilità, due temi che spaziano dall'efficienza energetica dei macchinari e delle catene produttive fino al packaging a impatto zero sul clima.

Purtroppo c'è da registrare un dato negativo: ovunque si registra la carenza di manodopera specializzata e la difficoltà

a reperire giovani collaboratori. Una sfida che si trovano ad affrontare i produttori di macchinari, spesso impotenti di fronte alle pressanti richieste delle industrie di trasformazione. Ma qui la parola passa alla politica. Per far sì che la scuola – e qui stiamo parlando degli istituti tecnici industriali – possa diventare la cinghia di trasmissione dell'industria.

Nel frattempo le aziende devono investire sempre più nella digitalizzazione, nell'automazione e nella robotica. Processi che consentono di alleggerire il lavoro e semplificare ogni livello nella lavorazione degli alimenti.



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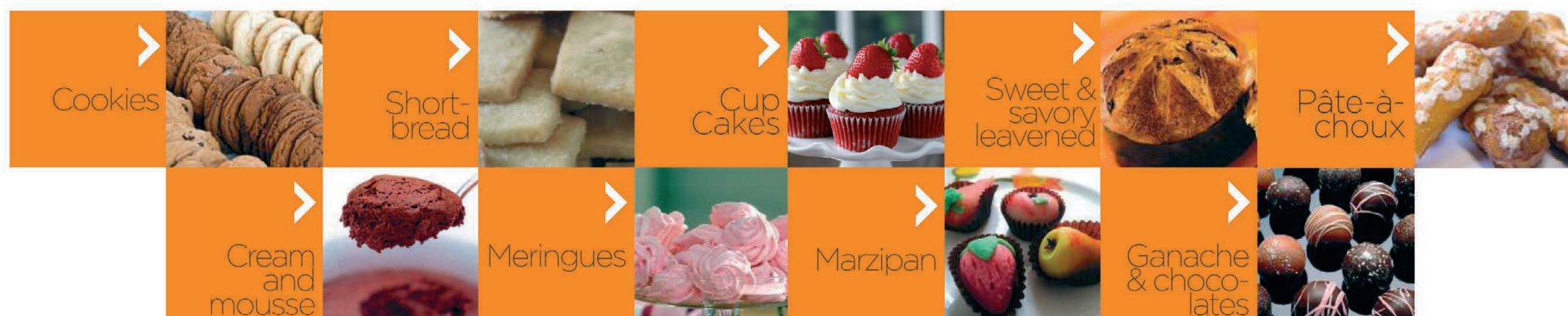
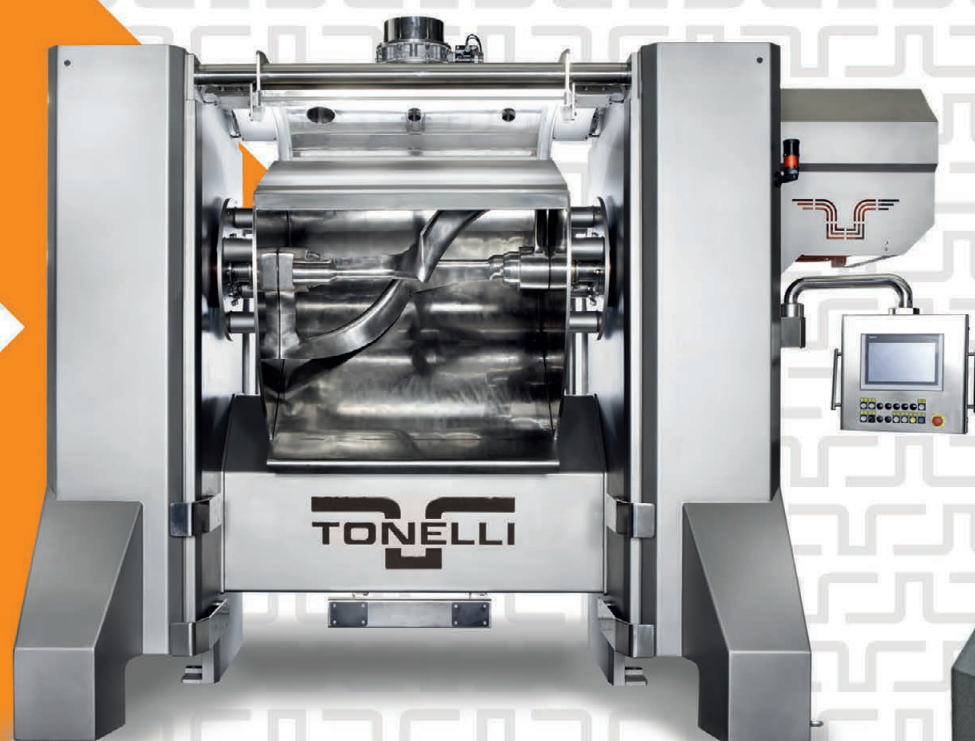
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Food sustainability: Cirfood District will open in 2020

Cirfood District will open in Reggio Emilia in the first half of 2020. The new centre, dedicated to food sustainability, is Cirfood branded, a cooperative enterprise operating in collective catering. It will be an experimental restaurant, a kitchen lab, a media library and an 'edible forest' of local species, all at the same time, with itineraries to discover the origin of food and biodiversity. It will operate mainly in the food care, production, taste and education fields and will be located in a new sustainable building, with an ecological roofing and solar panels. As for the 5 million euros project, Giordano Curti, general director of Cirfood, declared: "Our goal is to create an open innovating area, where companies and institutions together develop solutions to address challenges – also local ones - on the future of food and nutrition".

Sostenibilità alimentare: nasce Cirfood District

Prevista per la prima metà del 2020 l'apertura a Reggio Emilia di Cirfood District, il nuovo polo dedicato alla sostenibilità alimentare targato Cirfood, cooperativa italiana attiva nella ristorazione organizzata. Il nuovo centro fungerà contemporaneamente da ristorante sperimentale, laboratorio di cucina, mediateca e 'foresta edibile' di specie autoctone padane, con percorsi di approfondimento sulle origini del cibo e sulla biodiversità. Sarà attivo principalmente nei settori di cura, produzione, gusto ed educazione alimentare e verrà ospitato all'interno di un nuovo edificio che rispetterà la sostenibilità ambientale, con una copertura ecologica e pannelli fotovoltaici. Riguardo al progetto, del valore di 5 milioni di euro, il direttore generale di Cirfood Giordano Curti ha dichiarato: "Il nostro obiettivo è creare un luogo di innovazione aperta, dove aziende e istituzioni, sviluppino insieme soluzioni per le sfide, anche locali, sul futuro del cibo e della nutrizione".

Epta presents the new range of Slimfit Costan food cabinets

Epta, a multinational company specialised in equipment for commercial refrigeration, has launched the new Slimfit Costan branded range of compact cabinets, designed for proximity stores in big cities. The new range is made up of different solutions: the positive temperature vertical Tango Next, the semi-vertical Mambo Next with cascade shelving for fresh packaged products, the negative temperature vertical Valzer Next, the new semi-vertical Twist Next for frozen products and Ballet Next, the special solution dedicated to the display of white and red wines. Their strong point is a larger capacity and minimum floor space occupancy and the attention to the environment; but Epta relies on aesthetics, as it offers the possibility to align and mix the cabinets. William Pagani, Group marketing director of Epta, explains: "With Slimfit, we commit ourselves to support retailers in developing articulate concepts, which include methods of sale, setting, types of equipment, showcase and new ways of consumption, that are the real competitive factor in small areas and contribute to enhance the offer value".

Epta presenta la linea di banchi alimentari Slimfit Costan

Epta, multinazionale specializzata nella refrigerazione commerciale, lancia la nuova gamma di banchi compatti SlimFit a marchio Costan, pensata appositamente per i proximity store delle grandi città. La linea si compone di diverse soluzioni: i verticali positivi Tango Next, i semiverticali Mambo Next con ripiani a cascata per i freschi confezionati, i verticali negativi Valzer Next, i nuovi semiverticali Twist Next per surgelati, e Ballet Next, la speciale soluzione dedicata all'esposizione delle selezioni di vini bianchi e rossi. Punti di forza della gamma sono la capienza maggiorata e il minimo ingombro al suolo, così come l'attenzione all'ambiente; ma Epta punta anche sull'estetica, con la possibilità di allineare e mixare tra loro i banchi. William Pagani, Group marketing director di Epta, spiega: "Con SlimFit Costan ci impegniamo a supportare i retailer nello sviluppo di un concept articolato, che comprenda forme di vendita, ambientazione, tipologia di attrezzature, esposizione e nuove modalità di consumo: tutti elementi che diventano il vero fattore competitivo delle piccole superfici e concorrono ad arricchirne il valore dell'offerta".

Granarolo sells off Zeroquattro Logistica to BCube

Granarolo Group has signed an agreement to transfer to BCube Zeroquattro Logistica, a company specialised in managing fresh agrifood products' logistics at controlled temperature. "The deal will allow Granarolo Group to focus more on development plans in Italy and abroad, which involve a spur towards innovation, product diversification and extension of the range", commented Gianpiero Calzolari, president of Granarolo Group. BCube provides integrated logistics services at a global level. The firm, founded in the '50s by the Bozano family, can count on 117 branches all over the world, with over 6 thousand employees and a 600 million euros revenue in 2018.

Ima acquires 63% of Atop's shares from Charme

The packaging giant Ima, owned by the Vacchi family, has announced the acquisition of 63% of Atop, a leading company, based near Florence, in the automation sector for the production of electric motors for the automotive industry. Thanks to the stocks bought by Charme Capital Partners (Matteo Montezemolo's fund), Ima's share goes up from 21% to 84%, with a 230 million euros investment. The operation includes also a deal for buying another 6%, Atop shares owned by the three founding members and the president Amedeo Felisa. Thus, Ima enters the e-mobility world, thanks to a project that should realise more than a half of the 89 million euros turnover estimated by Atop (up by 50%). "The industrial automation market applied to e-mobility will experience a record-breaking growth", declared Alberto Vacchi, president of Ima. "Atop is a chance for us to be leaders in this historic challenge".

Ima acquisisce il 63% delle azioni Atop da Charme

Il gigante del confezionamento Ima, di proprietà della famiglia Vacchi, ha annunciato l'acquisizione del 63% di Atop, azienda fiorentina tra le prime al mondo nell'automazione per la produzione di motori elettrici per l'automotive. Grazie alle azioni comprate da Charme Capital Partners (il fondo di Matteo Montezemolo), la quota di Ima passa così dal 21% all'84%, con un investimento del valore di 230 milioni di euro. L'operazione prevede anche un accordo per l'acquisto di un ulteriore 6%, azioni Atop di proprietà dei tre soci fondatori e del presidente Amedeo Felisa. Ima entra così nell'e-mobility, grazie a un progetto che prevede di realizzare oltre la metà degli 89 milioni di euro di fatturato stimato da Atop (in crescita del 50%). "Il mercato dell'automazione industriale applicata all'e-mobility crescerà a tassi record", ha dichiarato il presidente di Ima Alberto Vacchi. "Atop è per noi la migliore opportunità per posizionarci da leader in questa nuova sfida epocale".

Machinery: double-figure growth in 2018, a slowdown is expected in 2019

In 2018, the production of machine tool, robots and automation systems has increased by 11.3%, however manufacturers expect a setback in 2019, according to the annual assembly of Ucimu Sistemi per produrre - the Italian machine tool, robots, automation systems and ancillary products manufacturers' association – and to its president, Massimo Carboniero. In 2018, production reached 6.7 million euros (+11.3%), thanks to the domestic market positive trend, and to exports too, whose countries of destination were mainly Germany (394 million, +15.1%) and the United States (354 million, +11.5%). These figures are expected to slow down in 2019: in fact, according to predictions, production will grow by 3.6% (7 million euros) and exports should reach 3.9 million euros (+6.5% than in 2018). According to data published by the Ucimu assembly, technology consumption will slow down too. It is expected to experience a 1.1% increase compared to 2018 (5.2 million euros), as well as manufacturers' deliveries in the domestic market (3.1 million, +0.3%) and imports (2.1 million, +2.3%).

Macchine: crescita in doppia cifra nel 2018, previsti rallentamenti nel 2019

La produzione dei costruttori italiani di macchine utensili, robot e automazione, nel 2018 è cresciuta dell'11,3%, tuttavia si prepara a un raffreddamento del trend nel corso del 2019. È quanto emerge dall'assemblea annuale dell'associazione Ucimu Sistemi per produrre, e dalle parole del suo presidente Massimo Carboniero. La produzione nel 2018 si è attestata a 6,7 milioni di euro (+11,3%), grazie al positivo andamento del mercato interno, ma anche all'export, i cui principali paesi di sbocco sono stati Germania (394 milioni, +15,1%) e Stati Uniti (354 milioni, +11,5%). Numeri che, secondo le stime, sono destinati a rallentare nel 2019: infatti, è prevista una crescita di produzione del +3,6% (7 milioni di euro) e l'export dovrebbe raggiungere i 3,9 milioni di euro (+6,5% sul 2018). Secondo i dati resi noti nell'assemblea di Ucimu, rallenterà anche il consumo di tecnologie, previsto in crescita dell'1,1% sul 2018 (5,2 milioni di euro), così come le consegne dei costruttori sul mercato domestico (3,1 milioni, +0,3%) e le importazioni (2,1 milioni, +2,3%).

Granarolo cede Zeroquattro Logistica a BCube

Il Gruppo Granarolo ha firmato l'accordo per il passaggio a BCube di Zeroquattro Logistica, azienda specializzata nella gestione delle attività logistiche di prodotti agroalimentari freschi a temperatura controllata. "L'operazione consentirà al Gruppo Granarolo di concentrarsi maggiormente sui piani di sviluppo in Italia e all'estero, che prevedono una forte spinta verso innovazione, diversificazione di prodotto e ampliamento della gamma", ha commentato Gianpiero Calzolari, presidente del Gruppo Granarolo. BCube, operatore internazionale nei servizi di logistica integrata, fondato dalla famiglia Bonzano negli anni Cinquanta, può contare su 117 sedi sparse in tutto il mondo, con oltre 6mila dipendenti e un fatturato di 600 milioni di euro, nel 2018.

**Food machinery,
Gulftech takes over 44% of Abl spa**

Gulftech, an American group renowned internationally in the food machines sector, has taken over 44% of Abl's shares, a company based in Modena (Italy) specialised in designing and manufacturing fruit processing equipment. The American holding bought Neip III Sicaf's block of shares, a private equity company of the Finint Group. Founded back in 1978 by Carlo Ascari, Abl spa, based in Cavezzo (in the province of Modena), closed 2018 with a 3.3 million euros Ebitda, after having closed 2017 with a 3.4 million euros Ebitda and almost no net financial debt. "Abl's award-winning innovative designs, outstanding product quality and reputation as a family owned and operated business in the fruit processing industry made them a very attractive integration for Gulftech," said Steven Ferrell, CEO of Gulftech. "The investment in Abl represents an important expansion of Gulftech's capabilities, significantly growing our presence in the fresh cut market segment".

**Macchine alimentari,
Gulftech acquisisce il 44% di Abl spa**

L'americana Gulftech, noto gruppo internazionale nel settore delle macchine alimentari, ha acquisito il 44% delle quote di Abl spa, società modenese specializzata nella progettazione e costruzione di macchine per la lavorazione della IV gamma. La holding americana ha acquistato il pacchetto azionario di Neip III Sicaf, società di private equity del gruppo Finint. Fondata nel 1978 da Carlo Ascari, Abl spa, con sede a Cavezzo (Mo), ha chiuso il 2018 con un Ebitda di 3,3 milioni di euro, dopo aver chiuso il 2017 con un Ebitda di 3,4 milioni e un debito finanziario netto vicino allo zero. "Le pluripremiate soluzioni innovative di Abl, l'eccezionale qualità del prodotto e la reputazione di un'azienda a conduzione familiare nel settore della trasformazione della frutta, l'hanno resa un'integrazione molto interessante per Gulftech", evidenzia Steven Ferrell, ceo di Gulftech. "L'investimento in Abl rappresenta un'importante espansione delle capacità di Gulftech, aumentando significativamente la nostra presenza nel segmento del fresh cut".

**Ipac-Ima: Valerio Soli
appointed new chairman**

Valerio Soli, CEO of Coesia Group, was appointed president of Ipac-Ima by the new Board of directors. "I am delighted to have been appointed chairman of Ipac Ima, a leading organiser of international processing and packaging exhibitions. In taking on this new role, I am committed to sharing my experience in the organisation of the many projects we are working on for the 2021 shows and in developing sustainable strategies for the future. Markets are evolving rapidly and continuously in response to new needs and consumer behaviours, so we must understand these trends and anticipate change so as to surprise and impress our customers. International presence, the digital world, technological innovation and environmental sustainability will be our main goals", commented Valerio Soli.

**Ipac Ima: Valerio Soli
nominato presidente**

Valerio Soli, amministratore delegato del Gruppo Coesia, è stato nominato presidente di Ipac Ima dal nuovo Consiglio di amministrazione. "Questa nomina alla presidenza di Ipac Ima, leader nell'organizzazione di eventi fieristici internazionali in ambito processing e packaging, riveste per me un grande significato. Accetto questo nuovo incarico con l'impegno di condividere le mie esperienze nella realizzazione dei tanti progetti su cui stiamo lavorando per l'edizione 2021 e per lo sviluppo di future strategie sostenibili nel tempo. I mercati sono in continua e rapida evoluzione, seguono le nuove esigenze e le nuove abitudini del consumatore; dobbiamo comprendere queste tendenze ed anticipare il cambiamento per sorprendere positivamente i nostri clienti. La presenza internazionale, il mondo digitale, l'innovazione tecnologica e la sostenibilità ambientale saranno i nostri principali obiettivi", ha commentato Valerio Soli.



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IBIE 2019 – Product preview

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“BREAKING BREAD”

With 1,000 exhibitors and 23,000 attendees,
Ibie is about to open its doors.
Brand new educational initiatives are scheduled.
And ground-breaking features are offered.
Focus on sustainability.

by Elisa Tonussi, Eleonora Davi, Margherita Bonalumi

It's almost time for the International Baking Industry Exposition - Ibie, the largest and most comprehensive trade event in the Western Hemisphere for the grain-based food industry. An occasion for manufacturers, artisan&retail bakers and wholesale bakers to explore current trends and technologies, equipment and ingredients and to shape the future of the baking industry. The 700,000 square feet area will host 1,000 exhibitors and more than 23,000 professionals from all over the globe, with more than 100 countries represented. Exhibitors hail from every segment of the grain-based food industry across the entire vertical supply chain, including: baking equipment and technology; ingredients, flavourings, spices and fillings; packaging materials and systems; refrigeration and sanitation equipment; transportation and distribution.

Educational initiatives

The triennial event, sponsored by the American Bakers Association (Aba), the Baking Equipment Manufacturers and Allieds (Bema) and the Retail Bakers of America (Rba), will be held in Las Vegas (Nevada, Usa) from September 8th to 11th, but it will be preceded by a day of learning. In fact, Ibie offers a large and forward-thinking baking educational programme: IBIEducate. Which

is designed to allow attendees, both artisan&retail and wholesale bakers, to gain valuable ideas and technologies in order to perfect their craft, further their passion, and increase sales. The former can attend lessons on baking with edible cannabis or on growing their business through branding and social media, or on fresh floral designs for cakes and oil solutions to meet consumers' needs. The latter have another different range of topics at their disposal: from automation to robotics-based packaging systems, from food safety best practices to labelling.

Innovations in offering

Thought to bring together the entire professional baking community, Ibie 2019 will feature two new state-of-the-art Artisan Marketplaces. These innovative and interacting spaces feature education, demonstrations and personalised baking experiences, for artisan bakers looking to hone their skills, make connections and grow their businesses, as well as wholesale bakers looking to capitalize on this growing trend. Among the latest offerings of the fair, Ibie will feature Virtual Bakery Tours to provide attendees with value-added experiences. Thanks to the partnership with Iba - the world's leading trade fair for bakery, con-

fectionery and snacks held in Munich -, visitors will be able to explore top bakeries on a national and international level, without making a step. By simply wearing virtual reality glasses, attendees can watch 360-degrees videos to visit renowned bakeries from around the world. Moreover, there will be Fresh Take Talks and the all-new RBA Bakers Center, which offers live demonstrations from some of the biggest names in baking.

Focus on sustainability

From ingredients to processes and packaging, green trends touch every aspect of baking. For this reason, at Ibie, there is a wide offering of organic and fair trade ingredients, as well as zero waste and energy efficient equipment. In addition, the Best in Baking prize will be awarded to bakeries or suppliers committed to reduce their environmental impact and to foster green solutions.

Italian companies' preview

Over 40 Italian companies won't miss this opportunity to expand their business and keep up with the latest trends in the industry. In the following pages, a preview of some of the new technologies and equipment that they will showcase in Las Vegas.

BREAKING BREAD

Con 1.000 espositori e oltre 23mila professionisti del bakery da tutto il mondo, Ibie sta per aprire le porte dall'8 all'11 settembre a Las Vegas. In programma nuove iniziative di formazione per grossisti e artigiani. Previste anche proposte innovative per esplorare il mondo dei panificati: due nuovi spazi Artisan Marketplace e il tour delle più prestigiose fabbriche e aziende con la realtà virtuale. Ancora una volta, un occhio di riguardo al tema della sostenibilità. Nelle pagine a seguire, in anteprima, alcune delle tecnologie italiane presenti alla kermesse statunitense.

A GLIMPSE AT THE BAKING INDUSTRY

The increasing demand for bakery drives the market. It has been growing steadily in the past years with trends suggesting that it will grow further in the coming years until 2021.

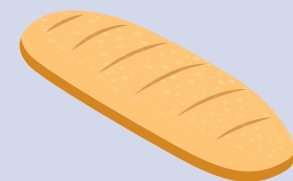
Exposed to international cultures and foods, consumers embrace a wider range of baked foods and snacks that's driving the type of equipment that bakers buy. The biggest challenge is bakers responding to changing consumer demands. Shifting in consumer preferences are reflected in the face of international events such as the International Baking Industry Exposition (Ibie).

The position of baking industry

Europe dominates the global bakery market and is expected to be the highest revenue contributor until the end of 2020. In fact, according to a new Gir (Global Info Research) study, the worldwide market for Bakery is expected to grow at a Cagr of roughly 2,4% over the next five years. It will reach 77,100 million dollars (about 69,248 million euros) in 2023, from 66,900 million dollars (60,093 millions of euros) in 2017. The European bakery industry is a traditional one with many established bakers and bakery chains that follow traditional artisanal practices and also align with modern-day requirements.

For example, one of the most significant trends is an increasingly health-conscious consumer. Ancient and whole grains, all natural ingredients, and no added preservatives will increase the value of bakery's products.

It is estimated that retail bakeries can set themselves apart by offering a variety of organic products, particularly those that are locally sourced from sustainable farms. Yet, a few negative factors that will affect the retail bakeries industry through 2021 include volatile ingredient and energy prices, rising payroll and healthcare costs, and the improving quality of packaged baked goods. Anyway, based on relevant trends, the baking industry is poised for continued growth, especially for those that capitalize on health, sales and marketing, and flavor trends. Retail bakeries that offer fresh products with high-quality ingredients, affordable pricing, a clean and uncluttered store, enticing display cases, short wait times, and excellent customer service will be the most successful over the next few years.



Uno sguardo al settore della panificazione

La crescente domanda di prodotti da forno spinge il mercato dei panificati che, negli ultimi anni è cresciuto costantemente. Con tendenze che suggeriscono che ci sarà un'ulteriore crescita nei prossimi anni, stimata fino al 2021. Secondo un nuovo studio Gir (Global Info Research), infatti, il mercato mondiale dei prodotti da forno dovrebbe crescere a un Cagr di circa il 2,4% nei prossimi cinque anni, raggiungerà i 77,100 milioni di dollari americani nel 2023 (pari a circa 69,248 milioni di euro), dai 66,900 milioni di dollari (circa 60,093 milioni di euro) nel 2017.

follow



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- Bone saws
- Mincers
- Mixers
- Meat pressers
- Hamburger forming machines
- Sausage filling machines
- Portioning machines

Food processing machines

- Slicers
- Peelers
- Vegetable processors

Packaging machines

- Vacuum packaging machines

Food preservation

- Ice makers



All Minerva Omega Group machines can be "smart" thanks to NEMOSY (NEXus MONitoring SYstem), an innovative technology for monitoring and managing the whole machine inventory remotely from a web platform. Application designed for end-users, safety officers (SAFE), persons in charge of maintenance and assistance (TECH) and many more. IoT (Internet of Things) is already a reality for our machines.



IBIE 2019 – Product preview

MINIPAN

BOOTH:
5581



MULTIPURPOSE LINE FOR SPECIALTY BREAD

FIELDS OF APPLICATION

Bakery Industry

DESCRIPTION AND STRONG POINTS

The multipurpose line for specialty bread is the quintessence of the Minipan way: automation based on tradition, without compromises. Strong of the deep know-how in dough lamination, this unique solution can shape many different breads: from hamburger buns to tin bread, passing through hot dog rolls and moulded breads. The core of the line is the "Raffinatore": punch and fold technology used as sheet generator. Thanks to its specific process, Raffinatore homogenizes the air cells distribution inside the crumb and gives the final product an amazing texture, while respecting tradition and original baking methods. The line is equipped with Minipan exclusive Scrap Free technology, which does not generate lateral waste and delivers to the forming station a sheet of dough strictly controlled in width and thickness. No waste means cheaper process and more revenues. Last but not least, the forming station is another huge innovation in Minipan's range. Depending on the recipe, producers can use the moulding device to shape rolls such as hot dog bread, sandwich bread and tin bread, or the rounder to obtain buns.

www.minipan.com

GORRERI

BOOTH:
7692



CHEESE-CAKES AUTOMATIC PRODUCTION LINE

FIELDS OF APPLICATION

Cheese-cakes

DESCRIPTION AND STRONG POINTS

Gorreri Cheese-cakes production line can be tailored on customers' needs and it can be customizable with many different dosing, covering and decorating systems. Each line can be equipped with oil spraying units with spraying guns at elevated transfer equipped with special nozzles that insure a perfect nebulization at very low pressure and an oily smokes aspiration centrifuge; dosing units for crumbled with motorized reels to crumble the pastry and to trim the thick-ness pneumatic pressing device; volumetric doser machine Dosamatic or Dosatron for cheesecake cream with no-tools disassembling system to easily wash and clean components; volumetric doser machine Dosamatic or Dosatron for jam or chocolate with Mixing device to have a customized final product.

TECHNICAL INFORMATION

- Stainless steel structure
- Easy washable
- Adjustable feet
- Warming and cooling devices for hoppers.

www.gorreri.com

CAVANNA

BOOTH:
7709



TSL (TRAY SLUG LOADER)

FIELDS OF APPLICATION

Tray Slug Loader is the new system developed for products enrobed with chocolate, cookies, sandwiches and products with decorations.

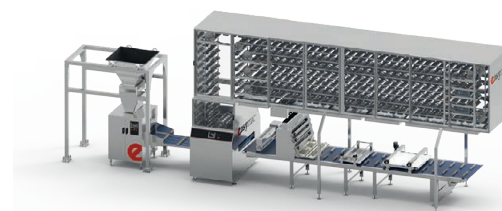
DESCRIPTION AND STRONG POINTS

TSL is a new numeric, multi-lane loader. It combines three different functions: fill PVC blister trays with or without lid, fill PVC trays with or without lid and feed the slugs directly into the bar infeed of the flow wrapper. Trays can contain from one to three different portions of products. Depending on the type of product, the new TSL loader can manage up to 85 pieces per minute in each lane. On a same flow wrapper it can accommodate one or two loaders. Cavanaugh's Tray Slug Loader system offers significant advantages: gentle handling of the products on edge, eight different types of packaging with only one solution, small footprint, easy sanitization, fast change-overs, products coming randomly or not, no product accumulation, loader lanes balancing, vision system for products dimensional control and high ergonomics.

www.cavanna.com

EASYMAC

BOOTH:
252



DIVIDER ROUNDER MOD.BRE-DIV

FIELDS OF APPLICATION

Bakery

DESCRIPTION AND STRONG POINTS

The new divider rounder machine model BRE-DIV is designed and built for the production of round bread, characterized by the very high precision of weight and the quality of rounding. The dough, entered through the plastic hopper, is compressed into the dividing drum, that obtains the desired weight, adjusting the pistons stroke. Dough pieces then fall into the rounding drum, where the oscillating movement of the internal drum, together with a special belt, shapes the round bread. Dough balls are unloaded on conveyor belts for manual collection or to be transferred to an automatic line.

TECHNICAL INFORMATION

- Weight range 28/75 - 50/160 - 150/175 - 175/205 - 205/235 - 235/270 - 270/310
- 310/240 - 340/370 gr
- Number of rows: 3-10
- Automatic flour duster
- Stainless steel and anodized aluminum structure

www.easymac.it

COLUSSI ERMES

BOOTH:
6439



SPIN DRYING SYSTEMS

FIELDS OF APPLICATION

Thanks to continuous evolution over the last decade, Colussi Ermes has become the absolute leader in drying systems, above all with the development of crate spin dryers. Large capacities of up to 6,400 crates/hour, speed and perfect drying, are just some of the features which, together with the possibility of handling crates of different types and sizes, set the new generation Colussi Ermes centrifugal dryers apart from the rest. Endless innovation over the years has led the birth of the "super-compact" spin dryer for crates, a machine able to combine large drying capacity with a minimum footprint. Colussi Ermes crate spin dryers can be added to existing systems as well as new ones; a design which has been created focusing on the footprint and the parts, allowing it to be adapted to extremely limited spaces. It is available in the Single or Twin-lane version, and within just a few seconds, the Colussi Ermes crate spin dryer is able to ensure perfect drying with limited energy consumption. The high performance combined with high energy efficiency levels make it an effective and economical solution.

TECHNICAL INFORMATION

- Possibility of drying crates of different dimensions, both rigid and collapsible in just two seconds
- Capacity of up to 2,100 crates/hour in the single version.
- Capacity of up to 4,200 crates/hour in the Twin-lane version.
- Maximum drying: 2-4 gr of water residue.
- Flexibility: suitable for all types of rigid and collapsible crates.
- Minimum footprint: EU from 3,800 to 4,200 mm; America from 4,200 to 5,400 mm.
- Energy savings of between 80% and 90%

www.colussiermes.com

RAM

BOOTH:
7037



AUTOMATIC DOUGH SHEETER MOD. QTP670

FIELDS OF APPLICATION

Pastries laboratories to laminate different kind of dough

DESCRIPTION AND STRONG POINTS

Queen Tronic Plus 670 (QTP) has a stainless steel structure and body, generous and intuitive 7" colour touch screen display allowing to store up 100 different programs, standard provided with automatic coiler and flour duster. The wide cylinders (80 mm of diameter), activated by the new up and-down moving system by oil bath screws, guarantee an absolute precision of lamination. The belts and cylinders' speed can be adjusted by means of an inverter in order to satisfy all needs. Noiseless and reliable trapezoidal toothed belt transmission, very few bulky thanks to its compact front and back carter, this sheeter is the perfect ally for all kind of use, artisanal as well as industrial. The Queen family include also the manual dough sheeters with table width of 500, 600 and 670 mm and the semiautomatic and automatic dough sheeters with table width 670 mm.

TECHNICAL INFORMATION

- Noiseless and reliable thanks to belts transmission
- Very strong and precise opening and closing cylinders system
- Very user friendly 7" colour touch screen with the possibility to store up to 100 different recipes
- Stainless steel structure AISI304
- Lamination cylinders with a larger diameter
- Automatic and removable flour duster
- Automatic coiler

www.ramsrl.eu

CEPI

BOOTH:
7031



INTEGRATED AUTOMATION

FIELDS OF APPLICATION

Bakery and biscuits, confectionery, pasta & cereals, dairy, premix, baby food and functional food, pet food, beverage.

DESCRIPTION AND STRONG POINTS

Cepi provides fully automated systems for the storing, conveying and metering of raw materials: unbroken lines smoothly carry minor, micro and macro ingredients from storage silos to metering stations, with weight control in real time and operations managed by operator panels and software providing full traceability and warehouse management. Cepi's solutions provide full horizontal and vertical integration, managing dialogue and data received by other partners operating in the lines, after the dosing and before the raw ingredients management. Production management on touch panel includes recipe creation and management, ingredient and hopper parametrization, overview for monitoring and maintenance of utilities with manual command. Warehouse management and production process control software provides full traceability of raw materials, with storing and recipe data history, batch report, consumption report with dynamic graphics focused and lot control with barcode.

TECHNICAL INFORMATION

- Metering of powders and liquids
- Production management
- Recipe creation and management
- Product and hopper parametrization
- Recipe and single ingredient dosing
- Monitoring and maintenance
- Control and digitalization of all ingredient movements with barcode system
- Data history
- Batch report
- Dynamic representations
- Touch panels on multiple platforms (Siemens, Rockwell and Codesys) and in multiple sizes (4", 7", 9" and 12")
- Installation and start-up
- Helpdesk
- Assistance in site
- Monitoring

www.cepisilos.com

ESMACH

TMB BAKING:
BOOTH: 3127

BELSHAW:
BOOTH: 5817

EM BAKERY
EQUIPMENT:
BOOTH : 2072



SPI/F - SPIRAL MIXER

FIELDS OF APPLICATION

Bakery, pastry, pizza parlour, restaurants

DESCRIPTION AND STRONG POINTS

SPI comes in 10 models with a capacity ranging from 30 kg to 300 kg of dough. The spiral mixers are available in both the electro-mechanic and electronic versions. Esmach has an attentive focus on the research and monitoring of all aspects regarding the process and the growth of the dough, the latest products, the rheological properties of the blends, their timings and their final temperature. The transparent LID protection for food contact obliges the flour to remain inside the machine, thus reducing the dispersion of sensitizing allergens, which could cause breathing ailments. Optimum balance between the bowl rotation and the spiral arm enables an ideal flow of the kneading and is perfect for a soft and gentle handling of the dough. A perfectly shaped arm rotates along the sides of the bowl and the accurate proportions among bowl, spiral arm and central bar, work together seamlessly towards the creation of even, soft and distinguished dough, also when only small amounts are used. Accurate speed of the bowl and spiral arm for working the kneading and its processing pattern through controlled stretches and strains, intended for a continuous and consistent handling, lead to a significant reduction of the processing time and the temperature of the dough.

TECHNICAL INFORMATION

All models share common platforms fitted in different frame sizes which ensure availability of spare parts and a speedy after-sale service. The steel frame is properly enlarged and strengthened to give firmness to the stability of the machine. The outer casing is painted with an anti-corrosion double epoxy powder coating, suitable for food contact. The cover lid is in thermoformed Abs. The three wheels with blocking wedges ensure stability and leveling on uneven floors. The stainless steel bowl with a sturdy rim for extra support. Transparent Lid for food contact complying with the most restrictive safety regulation. The power panel is in a IP55 box for protection against flour dust and water sprays. Independent motors for the bowl and spiral arm for models from 60 to 300 kg. One motor for 30 and 45 kg models. Two working speeds for the bowl and the spiral arm. Bowl rotation reversal device in first speed (except for 30 and 45 kg models).

www.esmach.com

SOTTORIVA

BOOTH:
2205



SUPER FLEX LINE

FIELDS OF APPLICATION

Industrial bakeries

DESCRIPTION AND STRONG POINTS

The Super Flex Line is a heavy-duty industrial line with maximum production capacity of 15.000 pcs/h, weight range up to 24 oz.

TECHNICAL INFORMATION

The Super Flex Line is the most complete line of Sottoriva's manufacturing range for all round, stamped and moulded rolls/bread, finger rolls, baguette etc. It is composed of a divider rounder at 1-2-3-4-5-6 pockets, intermediate proofer, moulding station, stamping unit (seeding, wetting and cutting station optional) and tray/rack loading device.

www.sottoriva.com

IBIE 2019 – Product preview

AGRIFLEX

BOOTH:
7667



FLOUR COOLING SYSTEM / PATENT NR. 1401347

FIELDS OF APPLICATION

Food industry, in particular baked products

DESCRIPTION AND STRONG POINTS

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

www.agriflex.it

TT ITALY

HALL:
CENTRAL
HALLS
BOOTH: 5873



TURBO MIXER

FIELDS OF APPLICATION

Bakery and pastry Field

DESCRIPTION AND STRONG POINTS

TT Italy's core technology is the Turbo Mixer: it is engineered to emulsify and aerate, through the injection of air or Nitrogen, cream or liquid batter by constantly controlling in a precise manner the desired density of the product. The Turbo mixer is born of avant-garde technology developed by TT Italy's engineers, which guarantees constant results, by assuring a fully automatic mixing process and continuous air injection directly in the turbo's head, with no need of operators. It combines innovative engineering features, such as the monoblock structure in stainless steel for sturdiness and hygiene, and the Double Cooling System of the aeration head. This important feature permits a constant control of the process, allowing a homogeneous texture and consistency of the final product with desired parameters (e.g. specific gravity). The latest innovation of TT Italy is the Volumetric Piston Depositor/Injector, which is directly connected to the Turbo Mixer and enables the dosing or the injection of the product by maintaining a constant feeding pressure.

TECHNICAL INFORMATION

- Entirely made in AISI 304 stainless steel
- Turbo geometry and mechanical seals of the turbo head are patented.
- Equipped with PLC able to save up to 150 production profiles, with configurable password protection.
- The machine comes CIP ready for easiness of cleaning and time saving

www.ttitaly.com

LOGIUDICE FORNI

BOOTH:
2235



ROTOR STREAM PLUS

FIELDS OF APPLICATION

Bakery

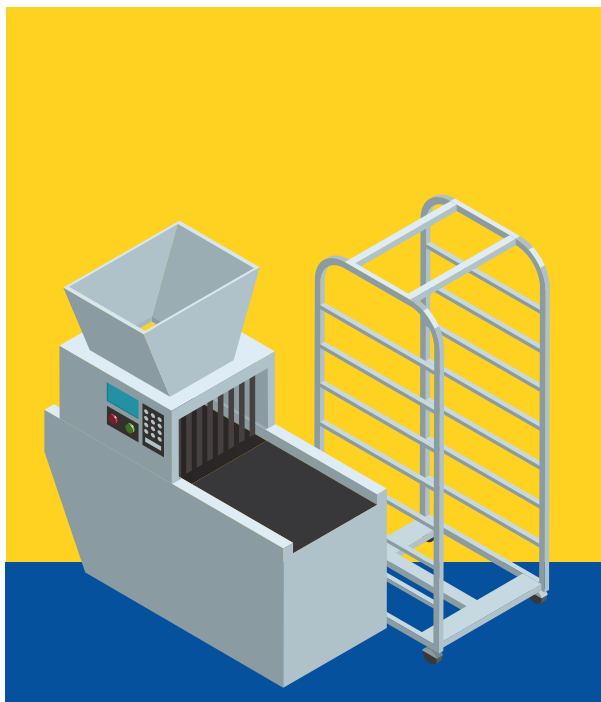
DESCRIPTION AND STRONG POINTS

Perfect baking results, excellent performance and compact size: a unique combination of characteristics which describe the design of the new Stream Plus rack oven. The new structure, which involves baking chamber, door, façade and external panelling in stainless steel, enables rapid oven assembly.

TECHNICAL INFORMATION

- Heat Exchanger: is designed to optimise efficiency, with a considerable reduction of operating costs. It consists of three hexagonal-section gas flues, which guarantee a greater surface area for heat exchange and air flow fluidity.
- Steam generator: consists of 12 sections containing cast iron spheres.
- Baking chamber: is made from stainless steel panels. External insulation is provided by rock wool panels.
- Hooking of the rack: the rack oven features numerous hook systems, available versions are either fitted with a top hook or rotating platform. Automatic rack lifting is also available. Double tempered glass with bores in the cavity to ensure continuous air flow and avoid overheating. Two vertical ducts have been incorporated in the door for continuous vapour extraction inside the chamber during baking.
- Automatic valve: the oven is equipped with an automatic valve which enables the introduction of room air temperature into the baking chamber. This mechanism limits the exit of vapour whenever the door is opened once baking has finished.
- Door opening system and Handle: an innovative door opening system, with double hinge that allows a constant adjustment.
- Extractor hood: the extractor hood system features a removable protection grille and extractor directly fitted on to the hood structure.
- Control panels: touch screen TS7.

www.logiudiceforni.com



MIMAC ITALIA

BOOTH:
2235



SUPREMA DROPPING MACHINE

FIELDS OF APPLICATION

Pastry equipment

DESCRIPTION AND STRONG POINTS

Designed for medium size producers who are seeking maximum flexibility coupled with excellent performance. The modern programmable functions offer pastry chefs a large variety of creative possibilities, from pouring to multilayer or open flame, down to wire cutting products. With an easy and intuitive programming, it is capable of memorizing up to 200 recipes. It also offers significant advantages such as: dosing accuracy; time and labour saving. It is suitable for hard, soft and fluid dough, also gluten-free and a large range of moulds and nozzles, even on demand, allows for the realization of products in a large variety of forms and dimensions.

TECHNICAL INFORMATION

- Dosing unit with Ø80 mm PET rollers.
- Electronically controlled variable speed of the dosing rollers.
- Electronic control of the table height position.
- Variable speed motor powered nozzle rotation.
- Variable speed motor powered wire cutting device.
- Software for lowering of table during dosing of multilayer products or open flame.

www.mimac.com

LASER

GUEST OF
TMB BAKING
BOOTH: 3127



BISCUIT LINES AND TUNNEL OVENS

FIELDS OF APPLICATION

Biscuit, cake, cracker production

DESCRIPTION AND STRONG POINTS

Laser provides turnkey solutions for biscuit, cake and crackers lines from mixers until stacking with various degree of automation and customization from 300 until 5000 kg/h.

TECHNICAL INFORMATION

All the lines are manufactured with the latest technical standard in automation, changeover and cleanability, customized for the product and the situation each customer requires. The possibility to install several accessories ensures a complete flexibility.

www.laserbiscuit.it



POMATI GROUP

BOOTH:
2613



ONE SHOT DEPOSITOR - POMATI

FIELDS OF APPLICATION

Chocolate machine

DESCRIPTION AND STRONG POINTS

Pomati Group is leader in the production of chocolate machines. Three models: One Shot Depositor zero, structured to meet the needs of pastries, capable of producing 120 molds per hour; One Shot Depositor OSD-5, capable of creating up to 70 kilos of chocolates per hour; One Shot Depositor OSD-10, our top-of-the-line product, designed to churn out 360 molds per hour. Therefore, the size and production capacity vary, while a number of aspects remain unaffected: the product's quality, immediacy of production, elasticity of parameters, manipulation of the raw material (filling, stratifications), cost containment and versatility. Pomati Group's One Shot technology has already brought interesting results in pastry preparations: to shape the fillings and doughs of sweets and in the ice cream and semifreddo sector. All productions affected by the use of chocolate. In all its nuances: of taste and texture.

TECHNICAL INFORMATION

OSD ZERO – 120 molds per hour
OSD 5 – 222 molds per hour
OSD 10 – 360 molds per hour

www.pomati.it

ROBOQBO

BOOTH:
127



QBO

FIELDS OF APPLICATION

Pastry, dairy, chocolate, ice creams, ready meals and food processing companies in general. Research laboratories, gastronomy, catering sector.

DESCRIPTION AND STRONG POINTS

Roboqbo produces Qbo, a versatile working system able to cook, cool down, concentrate, refine and vacuum-process any food product in various sectors. Now available in its 4th generation with large 10.1" touch-screen display as well as an easy-to-use interface with advanced control functions of the production process and sanitation.

TECHNICAL INFORMATION

Made of Inox Aisi 316L. Roboqbo comes with a micro-serrated blade knife, bowl scraper, speed control, Plc and software, pressure cooking and cooling system, automatic steam-jet cleaning program to clean concealed parts and the lid, pneumatic extrusion to deliver the product and automated ejection system for fluid and semi-fluid products, ingredient loading hopper from the lid, inspection window with glass wipers, lighting inside the bowl for direct control of the process, complete vacuum system, automatic bowl tilting movements, opening and closure of the lid, steam generation, compressor, Usb port for updates and technical support.

www.roboqbo.com

GAMI

BOOTH:
7131



ONE SHOT

FIELDS OF APPLICATION

Chocolate, tempering machine, enrobing machine

DESCRIPTION AND STRONG POINTS

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

TECHNICAL INFORMATION

Bowl capacity: 6 kg each
Hourly capacity: 60/70 kg/h
Dimensions: mm 1170 x 740 x 1360h

www.gamitaly.com

follow

STANDARD TECH IMPIANTI

BOOTH:
153



CLEAN ROOM FOR BAKING INDUSTRY "STERIL TECH®"

FIELDS OF APPLICATION

Baking industry

DESCRIPTION AND STRONG POINTS AND TECHNICAL INFORMATION

Standard Tech projects and installs turnkey Steril-Tech clean rooms for the baking industry. Sized in compliance with Iso 14644 and Fs209 standards, they are built with sanitizable wall panelling and ceilings. Heart of the system is the entirely washable air handling unit, suitable to deal with temperature, R.H., controllable air velocity and the pressure control system to avoid the penetration of potential external polluting agents. Based on production line requirements, the air flows are: unidirectional, where the Hepa filters are housed on a hood to direct the flow of outgoing clean air while the air intake grids are located on the low parts of the room; non-unidirectional, in which the sanitized working area is the entire production room. The size of a clean room is crucial because operators and primary packing materials, must pass through specific small rooms fitted with specific air showers, in order to prevent the clean room to be contaminated.

www.standard-tech.it

TONELLI GROUP

BOOTH:
5777



600LT. TONELLI VERTICAL PLANETARY MIXER

FIELDS OF APPLICATION

Industrial bakery and pastry, confectionery, snacks, food preparation, gastronomy, artisan patisserie.

DESCRIPTION AND STRONG POINTS

Tonelli Planetary Mixer has an unheard endurance, thanks to the use of passivated stainless steel. The gearbox, both conventional and oil free, can be equipped with special boosted tools for hard products. Ingredients are loaded automatically, with direct screws and flowmeters. It can be equipped with special pumps for product or C.I.P. solution discharge. In each phase of the recipe, the Tonelli smart software oversees the utilities consumption monitoring, giving you the pulse of performance. The exclusive Tonelli Planetary Mixing System guarantees top quality outputs. The machine is designed and developed to prevent the formation of bacteria and it is fully washable, even in C.I.P. systems. Thanks to its flexibility and versatility, it's easy to change product simply changing tools and parameters.

TECHNICAL INFORMATION

- Totally AISI304/316 stainless steel of high thickness, even passivated for higher endurance
- Soundproofing to ensure working parameters according to current regulations
- Oil free gearbox, also boosted for hard products
- Automatic feedings for powder and liquid ingredients
- Product/C.I.P. automatic discharge through special pumps
- Smart software: utilities consumption monitoring and recipes management

www.tonelli.it

BREVETTI GASPARIN – SLICING AND PACKAGING SYSTEMS

BOOTH:
2135



INDUSTRIAL CONTINUOUS BAND BLADE SLICER MODEL 1700

FIELDS OF APPLICATION

Baking industry

DESCRIPTION AND STRONG POINTS

Industrial continuous band blade slicer model 1700 has a fast interchangeable blades pitch, suitable to reach a capacity of 60 loaves per minute.

TECHNICAL INFORMATION

- Suited for the high-speed slicing of loaves of bread at high productivity in continuous cycle.
 - Designed for connection with automatic loaders and combination in line with industrial production systems.
 - Continuous blade cutting head mounted on rollers ground and balanced for perfect adherence.
 - Automatic pneumatic blade tensioning
 - Blade guide hooks in hard metal with cemented carbide
 - Blade pitch on request and interchangeable
 - Inlet loading conveyor belts: upper belt with adjustable height suitable to push the bread towards the blades and lower belt with adjustable lateral guides
 - Conveyor belt advance speed adjustable by inverter
 - Electric panel with centralized controls, emergency power built to standards and plexiglass protection screen
 - Sturdy painted steel support structure
- #### OPTIONALS
- Pneumatic oiling system on blades
 - Lateral chains for the product driving
 - Adjustable blade pitch with pantograph
 - Designed for in line combination
 - Stainless steel version

www.gasparin.it

UCM

BOOTH:
3214



ULTRASONIC FOOD CUTTING MACHINERY

FIELDS OF APPLICATION

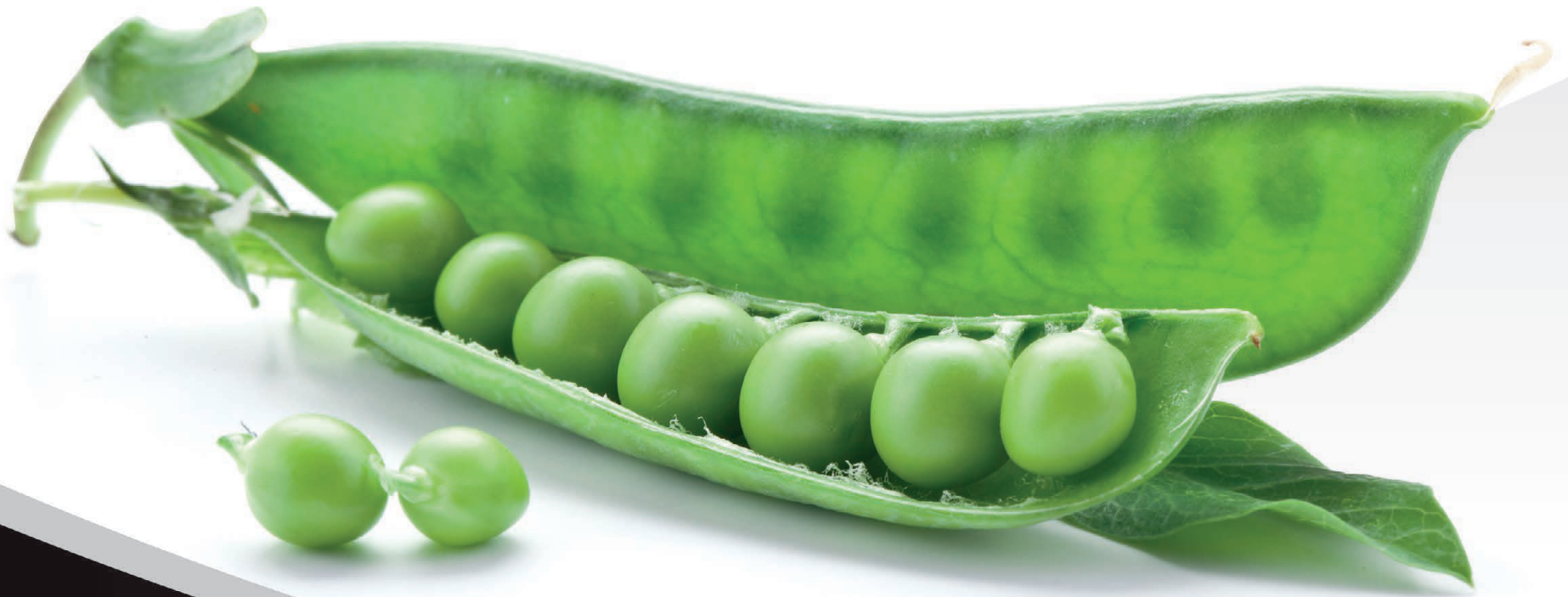
Food cutting

DESCRIPTION AND STRONG POINTS:

Ucm was founded in 2009 in Milano to apply the experience gained in the field of ultrasound, in the food cutting industry. Ultrasonic components such as the generator and transducer have been designed to achieve the maximum in ultrasonic food cutting. Thanks to its experience, Ucm keeps the generator, transducer and blade constantly updated which are the fundamental components to get the most out of the cut. In addition to manufacture ultrasonic cutting components, Ucm also manufactures cutting machines. This allows to design the right mechanics to get the most out of ultrasonic components. The company has studied and created a system of remote assistance and maintenance that allows to assist the customer in real time anywhere in the world. This is done for both machines and generators alone. Ucm can also make installations of machinery or cutting units remotely with a huge savings for the customer.

www.ucmultrasuoni.it

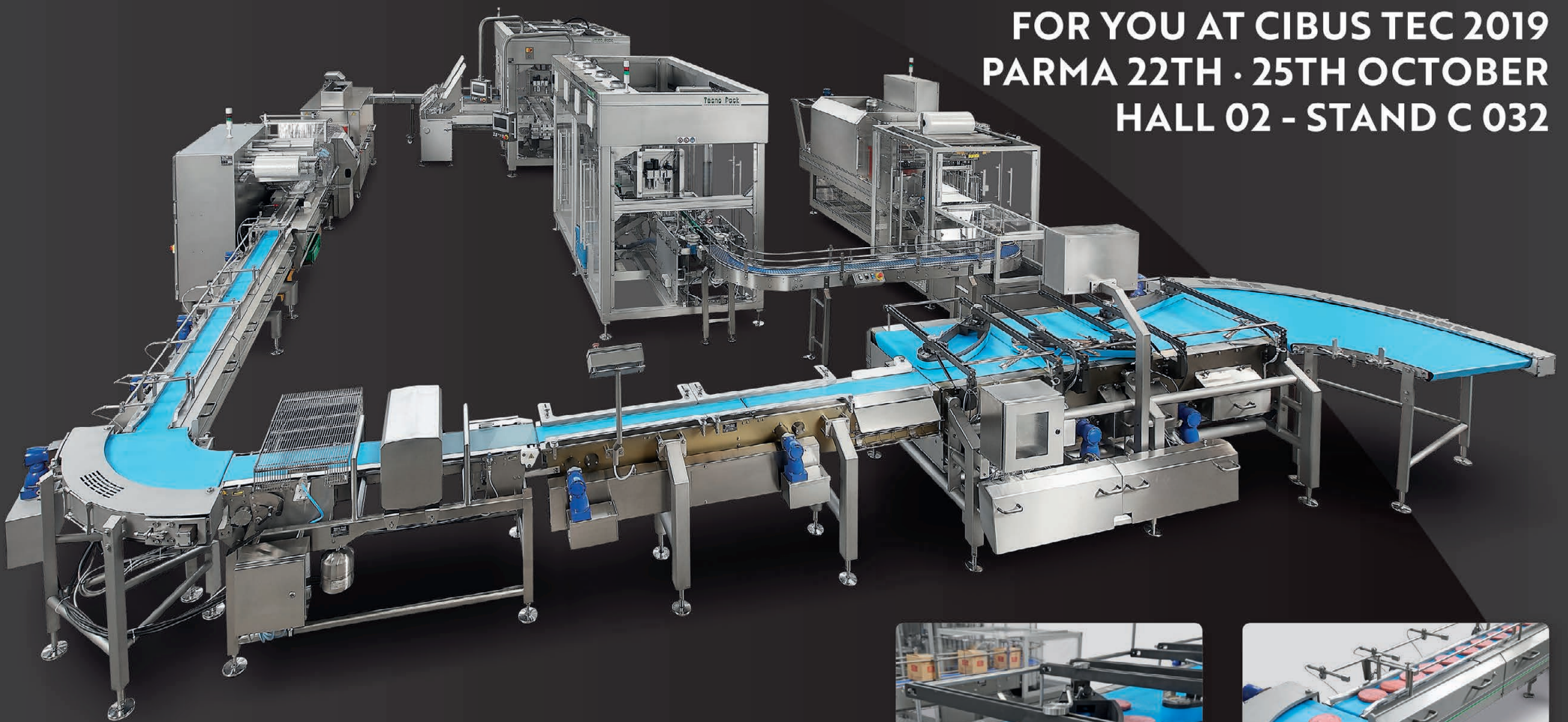
NATURE PRESERVES ITS PRODUCTS, FOR EVERYTHING ELSE THERE IS **TECNO PACK**



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CLOSED AND SUCCESSFUL

**TECNO PACK WILL WAIT
FOR YOU AT CIBUS TEC 2019
PARMA 22TH - 25TH OCTOBER
HALL 02 - STAND C 032**



GLOBAL PRESENCE



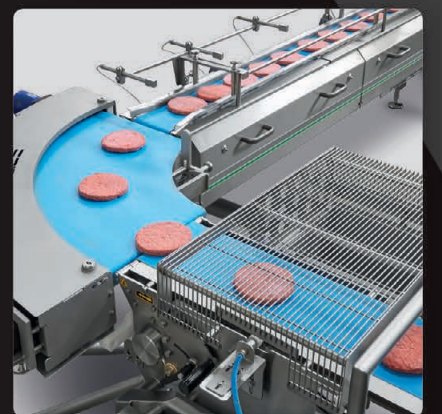
PRODUCTIVITY



DIGITALIZATION



**INFORMATION
TECHNOLOGY**



The represented plant has been supplied to a primary Italian company which works frozen meat and includes: automatic feeding system at high speed of the bulk product, electronic horizontal flow-pack FP100, shrinking tunnel, robotic feeding station for the cartoner machine, three feeders with inclined stores allow to realize packages which contain mix of products of different origin. Operative speed, reliability, great versatility, ease in format changes, complete automation, total realization as per law regulations Industry 4.0, complete traceability of products.

Tecno Pack
PACKAGING MACHINES

Via Lago di Albano, 76 · 36015 · Schio (Vicenza) Italy · +39 0445 575 661 · www.tecnopackspa.it · comm@tecnopackspa.it

Cibus Tec: even more international

Figures on the rise for the 2019 edition. The trade show devoted to food and beverage technologies (Parma, October 22nd – 25th) experiences a growth of 25% in exhibition space, of 30% in exhibitors, of 30% in foreign brands. Over 3 thousand top buyers from 70 countries are expected to visit the fair.

by Irene Galimberti

Cibus Tec is like a river in flood. The international show dedicated to food and beverage technologies, Kpe's (Koeln Parma Exhibitions) operating arm since 2016, records figures on the rise. Four months before the 2019 edition, which will be held from October 22nd to 25th, in the Parma fair district, the exhibition space (that will have an additional hall than in 2016) is already sold out. The announcement came during the presentation press conference, which took place in Milan on Wednesday, June 12th, with the participation of Antonio Cellie, ceo of Koeln Parma Exhibitions and of Fiere di Parma; Thomas Rosolia, president of Koeln Parma Exhibitions and ceo of Koelnmesse; Maria Ines Aronadio, director of the coordination office for promoting made in Italy of the Italian Trade Agency. In particular, the exhibition area experiences a growth (+25%, 6 halls, 120 thousand square meters), as well as the exhibitors (+30%), totalling 1.300 companies (there were one thousand in 2016). The number of sectors involved increases too. More and more workshops and demonstrations are scheduled. 40 thousand visitors (25% of them are foreigners) are expected to come to the exhibition and over 3 thousand buyers, from 70 countries, will be involved in the largest programme for Top Buyers of all the FoodTec fairs. (see box)

Internationalisation

The 52nd edition of Cibus Tec, in fact, will be in the name of internationalisation, not only because of the significant number of professionals from abroad, but also due to the strategic partnership with Koelnmesse and the Italian Trade Agency, that will lead to gather 400 foreign brands, from 25 countries, a 30% increase compared to 2016. As Thomas Rosolia explained during the press conference: "In this edition, we take advantage of the partnership between Koelnmesse and Fiere di Parma, that allowed Cibus Tec to be part of the largest permanent food machinery platform at a global level. Together with Anuga, Cibus, Ism, Anuga FoodTec, Prosweets Cologne and other 12

exhibitions of our network, in fact, we created a community of 11 thousand companies. It is a virtuous network that, on the one hand, has strengthened the internationalisation process of the event in Parma; on the other hand, it has contributed to promote made in Italy technologies across the border. The number of Italian exhibitors at Anuga Foodtec went up by 11%, while it grew by 14% at Prosweets Cologne".

At Cibus Tec 2019, the vast majority of foreign visitors will hail from Germany, followed by the Netherlands, Denmark, Switzerland and France. A considerable number of participants will come from China, the Usa and Turkey too.

Italy and related figures

Italy is master and key player. According to Prometeia data, it is undisputed leader in the food technologies sector. With a turnover of 7.3 billion euros, in fact, it accounts for 32% of the Eu28 production. Followed by Germany, with 5.9 billion euros (25% of the total production) and France, with 1.8 billion (8%). Italy ranks first also for performances – from 2013 to 2017, the value of the Italian production increased on average by 4.1% yearly, while in Germany and France it stopped at +3.8% and +3.5% respectively – and workforce: in Italy, there are around 2.200 companies hiring almost 30 thousand employees, a growth of 1.812 units from 2013 to 2017. More than Germany (1.217) and France (550). Figures are rounded down and do not take into account companies producing technologies for packaging and wrapping (1.100 companies with a turnover of 4.3 billion euros), that allocate a significant part of their products to the food industry. The Italian production of food technologies boasts high added-value products and a strong propensity to export (see the dedicated table).

Exhibition sectors

As for the exhibition sectors, technologies for all the supply chains of the agri-food industry are exposed, from fruits and vegetables

EXPORT OF FOOD AND BEVERAGE MACHINERY

In 2017, Italian export ranked first in six sectors of the food technology industry: equipment for preparing hot food and beverages (exports for 924 million euros); machines, equipment and tools for baked products (777 million); machines for processing fruits and vegetables (141 million); machines and devices to process oils and fats (113 million); and machines for wine (74 million). In 2018, despite having lost the first place in three sectors, with a market share of 16.1% (included the tobacco sector), Italy is still on the podium. Compared to 10 years ago, the value of the food and beverage machinery export has increased by 63%, passing the 4 billion euros threshold.

Main exporters of machinery and components for the food industry (divided into categories)		2017 (thousand euro)	2018 (thousand euro)	ranking 2017	ranking 2018
Equipment for preparing hot food and beverages	Germany	885.305	963.215	2	1
	Italy	924.378	943.612	1	2
	Usa	592.265	590.283	3	3
Other machines for food processing	Netherlands	764.871	884.652	2	1
	Germany	832.236	867.293	1	2
	Italy	735.412	721.193	3	3
Machines, equipment and tools for baked products	Italy	777.219	859.661	1	1
	Germany	288.667	286.629	2	2
	China	177.721	208.218	3	3
Machines for meat processing	Germany	550.487	556.179	1	1
	Netherlands	427.398	466.816	2	2
	Italy	167.993	149.279	3	3
Machines for cereals and dried leguminous vegetables	Turkey	207.677	186.166	1	1
	China	188.995	185.485	2	2
	Italy	156.983	140.126	3	3
Machines for chocolate processing and confectionery	Germany	269.781	338.494	1	1
	Netherlands	100.012	159.641	3	2
	Italy	102.709	133.579	2	3
Machines for fruits and vegetables processing	Netherlands	131.423	151.748	2	1
	Italy	141.899	149.937	1	2
	Usa	77.198	102.254	3	3
Machines, devices and tools for processing milk and dairy products	Netherlands	212.866	239.765	1	1
	Danmark	135.531	140.000	2	2
	Usa	124.329	117.777	3	3
Machines and devices for processing oils and fats	Malesya	92.184	107.046	3	1
	China	78.218	84.701	2	2
	Italy	113.342	74.841	1	3
Machines for tobacco processing	Italy	635.658	693.500	1	1
	Hungary	149.218	171.998	2	2
	Netherlands	65.454	98.798	3	3
Machines for wine	Italy	74.719	70.134	1	1
	Spain	47.642	42.556	2	2
	Germany	37.795	33.861	3	3

Source: Prometeia

From left: Thomas Rosolia, Maria Ines Aronadio e Antonio Cellie



to dairy, from meat (an area growing by 20%) to fish and ready-to-serve, including, starting from this year, bakery too (baked products and by-products of cereals, snacks and confectionery products). Moreover, as more than 150 beverage companies (juices, milk, water, soft drinks, beer, liquors and wine) will be present, for the first time in the 80-years-long history of the fair, an entire hall will be dedicated to this industry. All the sectors, as well as all the technologies. With packaging, that experiences a growth of 40% in the dedicated area, covering the whole supply chain, from immediate package to logistics, passing from end-of-line plants and packaging.

Events scheduled

At Cibus Tec, more and more sustainable and futuristic innovations will be exhibited, to offer consumers nutritious and, most of all, highly safe products. In fact, over one billion tons of food are wasted each year due to contamination. To this end, the event will host the third International biofilm summit (Ibs), the most important conference worldwide dedicated to biofilm issues in the food industry. The Cibus Tec Industry project

bets on technological innovation, instead. It will reproduce, in the fair, four functioning highly-automated lines, providing a complete cycle, for different sectors: dairy, meat, ready-to-serve and bakery. On the agenda as well: Tomato Day, in collaboration with Amitom and Wptc; Diu Design for intended use for food packaging showcases, organised by the Netherlands Packaging Center; and innovative workshops organised by the Ehedg (European hygienic engineering and design group) and the National council of the association of food technologists.

Cibus Tec: nel nome dell'internazionalizzazione

Numeri in forte crescita per l'edizione 2019 di Cibus Tec. La kermesse, dedicata alle tecnologie food and beverage (Parma, 22-25 ottobre), registra +25% di area espositiva, +30% di espositori, +30% di brand stranieri. Attesi oltre 3mila top buyer da 70 paesi. In scena le tecnologie per tutte le filiere del settore agroalimentare, con uno speciale Top Buyer Program e numerosi eventi e workshop in programma.

THE TOP BUYER PROGRAM AND OTHER SPECIAL INITIATIVES



Boosting Italian companies' export is one of Cibus Tec's main goals. That's why the largest Top Buyer Program of all the FoodTec trade shows was arranged, in addition to two special initiatives for India and Africa.

In order to encourage Italian tech companies and international food industry professionals to do business, the Top Buyer Program will take to Parma over 3 thousand buyers from 70 countries, promoting networking events, also thanks to business matching (Cibus Tec Business Agenda) and to continual promotional activities and road shows. India is the second agricultural producer worldwide after China and the sixth food market at a global level. Yet, wastes throughout the food supply chain are close to 40% than the primary production. The Italian Trade Agency, in partnership with the Confederations of Italian industry of Emilia-Romagna, Veneto and Lombardy, started 'India educational & business program'. It's a project, addressed to Italian manufacturing companies of the agro-industrial and food processing chain, made up of actions and services to develop agreements in India. In this context, Cibus Tec was chosen to host b2b meetings between the most important Indian companies of the sector and exhibitors.

Regarding Africa, the Italian Trade Agency promotes the 'Lab Innova' initiative, to develop the collaboration between African (Ethiopian, Mozambican, Ugandan, Tanzanian and Angolan) and Eu28 companies, thanks to technology transfer. The Continent's Gdp, in fact, is expected to increase by 5% yearly, so much that, according to the African Development Bank, the African Gdp will account for 5% of the global Gdp within 2030. In this context, the fruits and vegetables sector plays a crucial role, key to the African economic growth. In this case too, at Cibus Tec, targeted b2b meetings will be arranged.

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Mexico: the packaging speaks Italian

A fast-growing economy, with our country among the most important partners. Here is what came to light from the data presented by Ita on May 23rd in Milan.

by Eleonora Cazzaniga

Mexico meets Italy. The convention was organized by Ita (Italian trade agency), in collaboration with Ucima and Ipack-Ima. It was especially addressed to Italian companies that produce packaging machines, and to Mexican entrepreneurs, interested in buying this type of technology. Many were the activities planned in the agenda, such as the presentation of the research carried out by Ita on the Mexican market. Which was followed by b2b meetings between the Italian companies and the Mexican buyers, in order to support the creation of new commercial partnerships.

The market today

During their speech, Giuseppe Manenti, director of the Ita branch in Mexico City, and Ricardo Carrasco Manzo, Itbg Mexico, both gave an overview of the current situation of the Mexican market, then focused in particular on the import-export data for food packaging and wrapping machines.

The economic wealth is still not evenly divided in the country: indeed, 35% of the citizens earn a minimum wage of 102 pesos a day, which is about five euros. And the same happens for population density: almost 22 million people

(33%) live in Mexico City or in nearby areas, basically because that's the region which gathers the majority of factories. The economic system of the country is, nevertheless, growing rapidly, and so is doing the attention to nutrition and food packaging: something fundamental, considering that Mexico counts over 124 million people on its territory, a number that challenges the food industry.

Mexico has already signed commercial agreements with 44 countries, such as Us, Eu, Latin American countries and Japan. Italy, in particular, is the second largest supplier in Europe (after Germany) and the ninth on a global scale, with an export volume of 5.6 billion euros in 2018. However, Italy also imports some products from Mexico. These are usually goods produced there by the branches of multinational companies, most of all because the manpower is cheaper than in their countries: we're mostly talking about chemicals, motors and turboreactors, but also frozen fish and legumes. The trade of this products translated into 1.5 billion euros in 2018.

Mexico is our second destination market in the American continent after the United States. 85% of the products exported there by

Italy consist in machinery, electric components, metallurgical, chemical and plastic products. Whereas, the remaining 15% of the products is represented by clothing, jewelry, furniture and food products. However, Italy is not only a big commercial partner for Mexico, but some companies are also physically located in the country, with 1,700 active businesses.

The production of local companies and factories is highly diversified: indeed, each region of the country shines in a different sector. However, as already said, the majority of finances and businesses are gathered around Mexico City and in the north (near California), the areas where the largest part of the population lives.

How to approach the market

Speaking on a legal basis, there are no big setbacks for the companies that wants to invest in the Mexican market.

It is necessary to meet some quality standards (that are similar to the European ones) and to register brands and projects by the Mexican institute of industrial property (Impi). Moreover, although Vat is mandatory, it is lower than in our country (16%) and thanks to the Free trade agreement signed with Italy (and other coun-



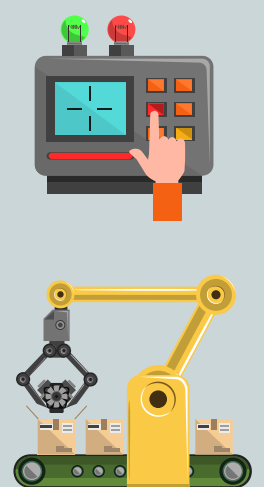
Mexico: Supplier countries (All products - December 2016 - 2018)

Partner	January - December (thousand euros)			Market share (%)	%Δ 2018/17
	2016	2017	2018		
Global	349.879.547	371.882.033	393.834.219	100	5.9
United States	162.357.002	172.247.008	183.033.537	46.48	6.26
China	62.829.152	65.453.812	70.908.641	18.01	8.33
Japan	16.042.618	16.121.748	15.436.179	3.92	-4.25
Germany	12.546.982	14.516.753	15.021.235	3.81	3.48
South Korea	12.300.692	13.938.762	14.216.161	3.61	1.99
Canada	8.702.489	8.655.296	9.133.983	2.32	5.53
Malaysia	7.375.201	6.977.472	7.987.119	2.03	14.47
Taiwan	6.183.384	6.583.497	7.020.594	1.78	6.64
Italy	4.781.558	5.443.361	5.601.512	1.42	2.91
Brazil	4.276.782	4.811.370	5.523.362	1.4	14.8

Data Source: Mexico National Institute of Statistics

Messico: l'imballaggio parla italiano

Un'economia in forte crescita, come emerge dai dati di Ice-Agenzia presentati a Milano il 23 maggio. I relatori Giuseppe Manenti (direttore dell'ufficio Ice di Città del Messico) e Ricardo Carrasco Manzo (Itbg Mexico) hanno fornito un quadro generale del mercato messicano, con un focus particolare sui dati di import-export di macchinari per l'imballaggio e il confezionamento di prodotti alimentari. L'Italia è il secondo partner commerciale in Europa (dopo la Germania) e il nono al mondo, con un volume di export pari a 5,6 miliardi di euro nel 2018.



Unstoppable packaging

With a 7.85 billion euros turnover, the sector proves right to be one of the most dynamic industries in Italy. Food and beverage machines lead sales. Together with exports, which make up 78.9% of the field's income.

by Elisa Tonussi

It was a very good year. Ucima can well state so. The 2018 outcome couldn't have been more positive. According to the 7th National Statistical Survey of the Italian packaging machinery manufacturers association, the sector grows nine times faster than Italy's Gdp. Indeed, the automatic machines branch has never stopped growing since 2001, recording a 4.4% compound annual growth rate, and increasing in value from 10.9 million to 22.6 million euros. Thus, it proves to be on the most dynamic industries in Italy. A sector that, accounting for one fourth of the global machines export, compete for the leadership with Germany, both for technologies and market. Despite such promising context, Enrico Aureli, president of Ucima, doesn't go too far in making predictions for the future. "Given the slowdown in order acquisition in the first quarter of the year, we are very cautious about making forecasts for the current year. Markets are volatile and the geopolitical situation is changing continuously in many countries," Mr Aureli declared. "But considering the recovery in order acquisition in the second quarter, we are expecting to maintain or slightly improve on the excellent levels of business we achieved last year."

An overview of packaging automation in Italy

Published in June, the 7th National Statistical Survey is a proper overview of the packaging machinery sector. The report provides a comprehensive landscape of the different firms, the turnover-based segmentation, the type of machines sold and the market of destination, in addition to the international market penetration. 631 companies were analysed, fragments of the varied universe of the Italian packaging machinery manufacturers, who supply many different areas: food and beverage, cosmetics, chemicals and others.

Turnover: a +9.4% growth

Last year closed with a turnover of 7.85 billion euros: a 9.4% increase compared to 2017. With the food sector driving sales, followed by beverage and "others", that is to say tissue and tobacco, which experience a 14.6% reduction in sales in Italy, the only area at a loss. More than a half of the sector's turnover is realised



Inarrestabile packaging

Con un fatturato di 7,85 miliardi di euro, il settore delle macchine automatiche per il confezionamento e l'imballaggio si conferma uno dei più dinamici in Italia. Con le macchine per il food and beverage a trainare le vendite. Lo evidenziano i dati rilasciati da Ucima, associazione di categoria, che evidenzia incrementi sostenuti tanto in Italia, quanto sui mercati internazionali. Il comparto, costituito da 631 aziende, realizza il 78,9% del proprio fatturato sui mercati esteri, con Unione Europea, Asia e Nord America ad assorbire la quota maggiore. Nonostante i risultati positivi, Enrico Aureli, presidente di Ucima, non si sbilancia nel fare previsioni. "La battuta d'arresto registrata nei primi tre mesi dell'anno nella raccolta ordini ci fa essere molto prudenti nel far previsioni sull'anno in corso", dichiara Aureli. "Visto il miglioramento della raccolta ordini nel secondo trimestre, prevediamo però il mantenimento degli ottimi livelli di business raggiunti lo scorso anno o un lieve incremento".

by only 27 companies, proving that the market is made up of a constellation of small and medium enterprises. They are mainly dislocated in Emilia Romagna, along the road that runs from Milan to Rimini, and account for 63.6% of the field's income with over 50% of the workforce. Lombardy, Veneto, Piedmont and Tuscany follow the leader. Immediate packaging accounts for the biggest turnover share with filling and dosing machines, Form Fill Seal (FFS) and thermoforming machines.

Food and beverage rule the roost

As for the breakdown of turnover of the different client sectors, food and beverage is firmly established in the first position, accounting for 55.3% of the sector's income, up by about 15% compared to the previous year. In further details, food make up 29.2% and beverage 26.1%, with an export share of 72% and 82% respectively. Followed by "others" (tobacco, tissue, etc.), 20.1% of the turnover, and pharmaceutical (17.3%). Chemicals and personal care classify at the bottom of the rankings. In Italy, the food industry grows the most, while exports' increase is driven by the non-food sector, headed by the pharmaceutical field, up by 15.1% compared to the previous year.

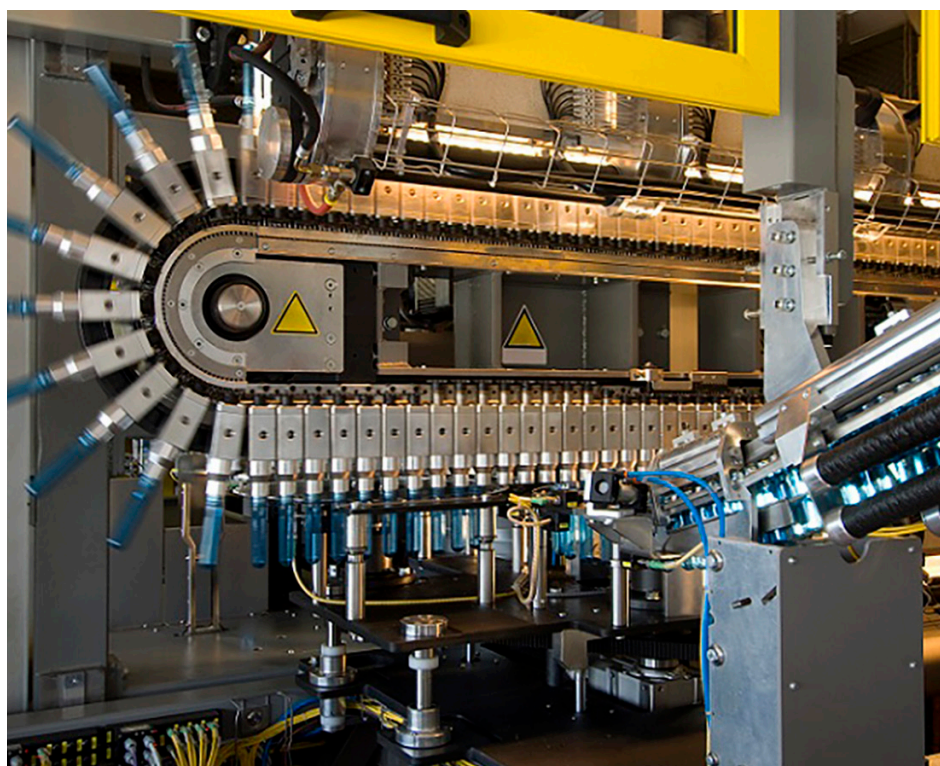
Export is the sector's strong point

Exports prove, once again, to drive the sector's sales. In fact, 78.9% of the field's turnover, equal to 6,205 million euros, derives from international business. Exports are proportional to the company's size and turnover: the bigger the firm is, the higher the export. Small and medium enterprises, that make up over 60% of the sector, destine 50% to 70% of their machines to international markets. While big firms sell more than 80% of their production on foreign markets. The European Union is the main area of destination, making up 38.1% of the turnover, up by 7.6% than in 2017. In details, Italy exports mainly in France, Germany, Spain and the United Kingdom. Asia ranks second, despite an 8% loss compared to 2017. While North America records a surprising 15% growth and gets the third position. Like in the domestic market, filling and dosing machines are the most exported products, followed by Form Fill Seal (FFS) and thermoforming machines.

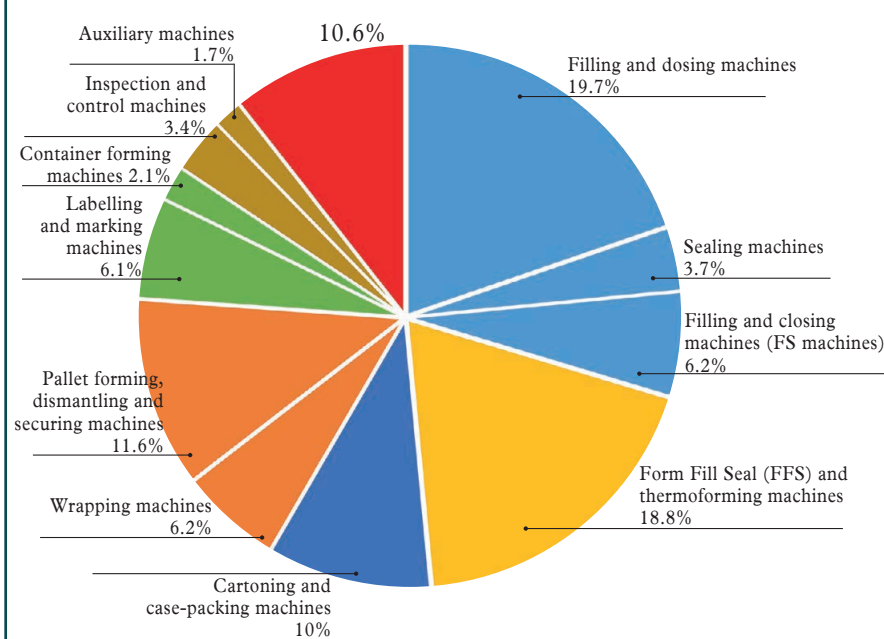
TURNOVER BREAKDOWN BY CLIENT SECTORS, 2017-2018

	Domestic turnover			International turnover			Total turnover		
	2017	2018	Var. %	2017	2018	Var. %	2017	2018	Var. %
Food	556.272 (37.1%)	636.725 (38%)	14.5%	1.618.695 (28.4%)	1.656.276 (26.7%)	2.3%	2.174.967 (30.2%)	2.293.002 (29.2%)	5.4%
Beverage	318.347 (21.2%)	367.347 (22.%)	15.3%	1.542.882 (27.1%)	1.686.092 (27.2%)	9.3%	1.861.369 (25.9%)	2.053.439 (26.1%)	10.3%
Pharmaceutical	228.227 (15.2%)	287.291 (17.3%)	25.9%	931.847 (16.4%)	1.072.801 (17.3%)	15.1%	1.160.074 (16.1%)	1.360.092 (17.3%)	17.2%
Cosmetics	71.809 (4.8%)	72.443 (4.4%)	0.9%	200.357 (3.5%)	211.671 (3.4%)	5.6%	272.166 (3.8%)	824.114 (3.6%)	4.4%
Chemicals	64.722 (4.3%)	73.719 (4.4%)	13.9%	193.011 (3.4%)	217.232 (3.5%)	12.5%	257.733 (3.6%)	290.951 (3.7%)	12.9%
Other (tissue, tobacco, etc.)	260.569 (17.4%)	222.483 (13.4%)	- 14.6%	1.203.520 (21.2%)	1.361.214 (21.9%)	13.1%	1.464.089 (20.4%)	1.583.697 (20.1%)	8.2%
TOTAL	1.500.086	1.660.009	10.7%	5.690.312	6.205.285	9%	7.190.398	7.865.294	9.4%

Source: Centro Studi Ucima



TURNOVER BREAKDOWN BY TYPES OF MACHINERY, 2018



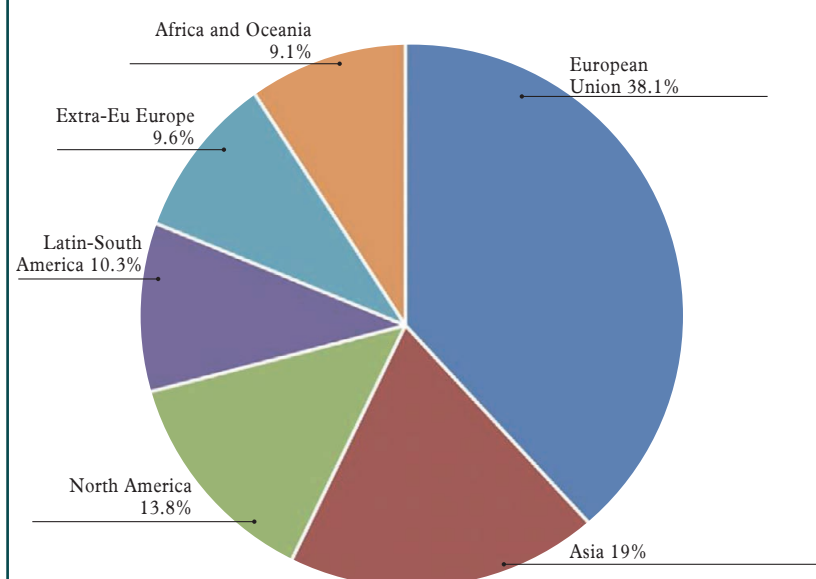
Source: Centro Studi Ucima

EXPORT VALUE BY GEOGRAPHIC AREA

	2017		2018		Var.% 18/17
	Value	%	Value	%	
European Union	1.905.656	37.4%	2.050.886	38.1%	7.6%
Asia	1.112.999	21.8%	1.024.038	19%	- 8%
North America	592.571	11.6%	741.351	13.8%	25.1%
Latin-South America	532.826	10.4%	552.713	10.3%	3.7%
Extra-EU Europe	515.409	10.1%	518.656	9.6%	0.6%
Africa and Oceania	439.555	8.6%	492.145	9.1%	12%
TOTAL	5.099.016		5.379.791		5.5%

Source: Elaboration on Istat data. Slightly different with respect to Ucima's data collection

EXPORT VALUE BY GEOGRAPHIC AREA



Source: Centro Studi Ucima



A major potential market



The third largest country for sales of food processing and packaging machinery in the Middle East provides Italian companies with big business opportunities. Even if price is too often a major concern for local f&b producers. The findings of a survey commissioned by the Italian Trade Agency and Cibus Tec.

by Federica Bartesaghi

The Italian Trade Agency (ITA) and the Cibus Tec trade show's organizers have commissioned a market survey on the agri-food industry in the United Arab Emirates, Iran, Oman and Pakistan. The report focuses on key sectors for food & beverage such as dairy, bakery and

snacks, mineral water, poultry, fruit and vegetables, and soft drinks. In this fourth and last part, we analyse market forecasts and business opportunities for Italian producers of food and beverage processing and packaging machinery willing to establish new business relationships

in Iran. For local f&b producers, affordability is a key purchasing factor and therefore local suppliers are often preferred. Nevertheless, when high quality is demanded, German and Italian technologies are often preferred, as is the case for the snacks and bakery industries.

F&B PROCESSING AND PACKAGING MACHINERY MARKET

KEY MACHINERY BRANDS FOR SOME F&B CATEGORIES

Dairy: locally-produced machines by Iranian suppliers are most preferred for their affordability. Most preferred company: Zainali. Preferred country of origin: Iran, Germany.

Fruits and vegetables: preference for local suppliers. Most preferred company: Alborz. Preferred country of origin: Iran, Germany.

Cooking oil: Iranian suppliers dominate the market. Most preferred company: Isfahan. Preferred country of origin: Iran.

Bottled water: domestic machines are most preferred by bottled water companies. Most preferred company: Tara. Preferred country of origin: Iran.

Snacks: Fava machines are most popular for snacks processing, followed by local brands. Most preferred company: Fava. Preferred country of origin: Italy, Holland, Iran, China, India.

Bakery: Koenig machines from Germany are most preferred for their

quality and efficiency. Most preferred company: Koenig. Preferred country of origin: Germany, Iran, Holland.

Soft drinks: Krones is the most popular brand for filling machines. Preferred country of origin: Germany, Iran, Poland.

Poultry: the German brand Kem Kraft is the most popular, but other brands from the UK, Turkey and Iran are also present in the market.

KEY BUYING FACTORS FOR F&B MACHINES

Affordable price and low maintenance costs

- Price affordability is a key factor, considering the volatile situation of Iranian economy, as well as low maintenance costs.

- Companies prefer local machines for most sectors as they are cheaper and also have local currency payment plans.

Good quality & efficiency

- Efficiency and quality are other key purchasing factors, in order to avoid frequent breakdowns.

- As regards machines in the jui-

ce and bakery sectors, which are run continuously (24h/6), local companies prefer highly reliable German machines.

Ease of operations

- Machines should be easy to operate and take less space in the factory

- Highly efficient machines in energy consumption (both electricity and water) will result in lower utility cost.

Easy availability of spare parts

- Due to high demand in the region, most machines are used throughout the day, with no stoppage.

- During breakdown of machines, critical time is lost, hence companies want local suppliers to supply spare parts quickly.

PERCEPTION TOWARDS ITALIAN BRANDS

According to the survey, Italian machines are mainly preferred in snacks. Exhibitions, online research and advertisements are main key sources for brand awareness.

Snack producers love Italian machines

Italian machines are mostly used for

snacks packaging, due to their perception of highly efficient machines with good quality. Despite most f&b sectors use local brands of machines, the Italian brand Alto Pak is used the most in snacks' packaging.

Sources of machinery brands awareness...

- Regular interaction with suppliers at exhibitions.

- Prior experience of working with similar machines (or based on recommendations).

- Internal research by sales managers.

- Advertisements.

- Machinery suppliers approach f&b companies.

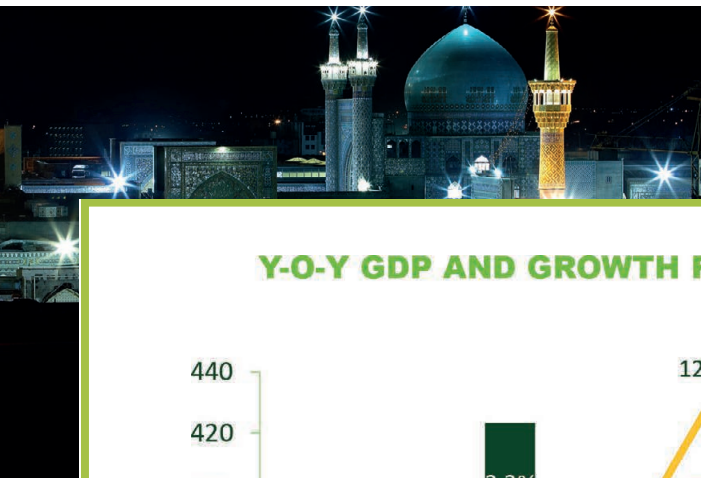
- Understanding about performance and brands of machines at competitor companies.

... and its impact on the market

- Regular visit to exhibitions in Iran and across Middle East.

- Regular attention to online medium based on new websites, machinery associations etc.

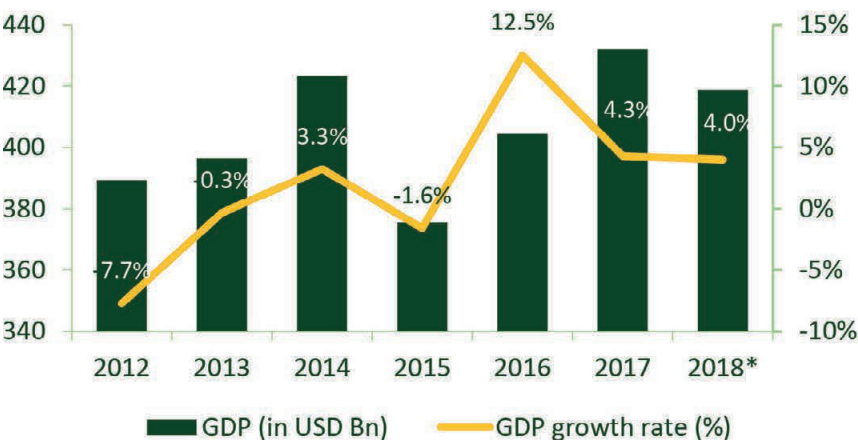
- Advertisements about machines in key industry catalogs.



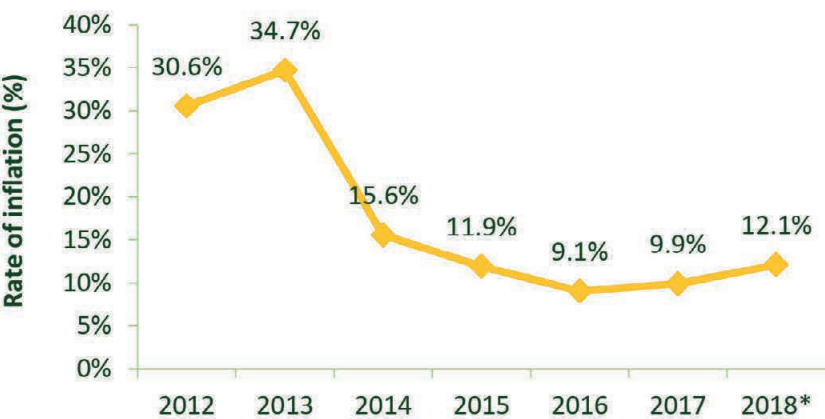
ECONOMIC INDICATORS

Despite a slow down of Iran's economic growth between 2017 and 2018, due to on going US barriers and sanctions, after 2018 the economy is expected to grow at faster pace on account of rise in demand from key staples such as petroleum products, water, electricity, and bread. Moreover, government's adoption of a comprehensive strategy for the sixth five-year plan development is expected to spur further growth. Inflation rate was recorded at 12.1% in 2018 as compared to 9.9% during the previous fiscal year. Rise in inflation was driven by growing costs of basic food and beverages such as milk and eggs.

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



Y-O-Y INFLATION (2012-18)

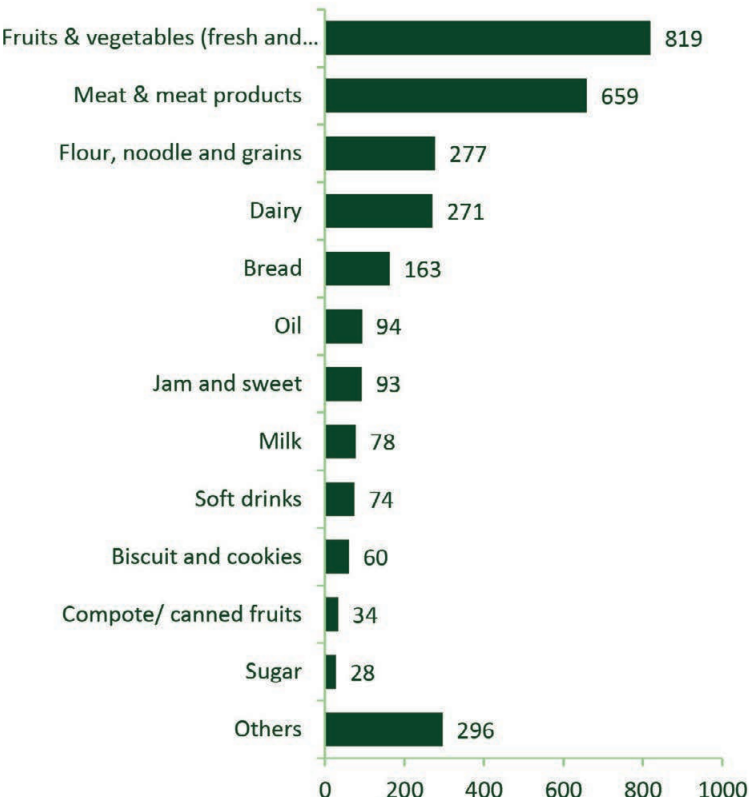


Note: *Estimated value
Source: World Bank, 2018 Index of Economic Freedom, Focus Economics, Trading Economics, Iran Data Portal, FRED Economic Data, Azer News, Kooema, Financial Tribune, Global Finance.

Iran: un mercato ad alto potenziale

L'Ice Agenzia, in collaborazione con Cibus Tec, ha commissionato un'indagine di mercato sull'industria agroalimentare di Emirati Arabi Uniti, Iran, Oman e Pakistan. Al centro del report, settori chiave del food & beverage quali lattiero caseario, panificati e snack, acqua minerale, pollame, frutta e verdura e soft drink. In questo quarto e ultimo approfondimento, l'attenzione è rivolta alle opportunità di business per le aziende italiane di food technologies in Iran. Dove nella maggior parte dei casi è il prezzo a guidare le decisioni d'acquisto dei produttori di alimenti e bevande. Ciononostante, quando si cerca l'alta qualità, la scelta ricade sulle aziende italiane e tedesche, come nel caso dell'industria degli snack e dei panificati.

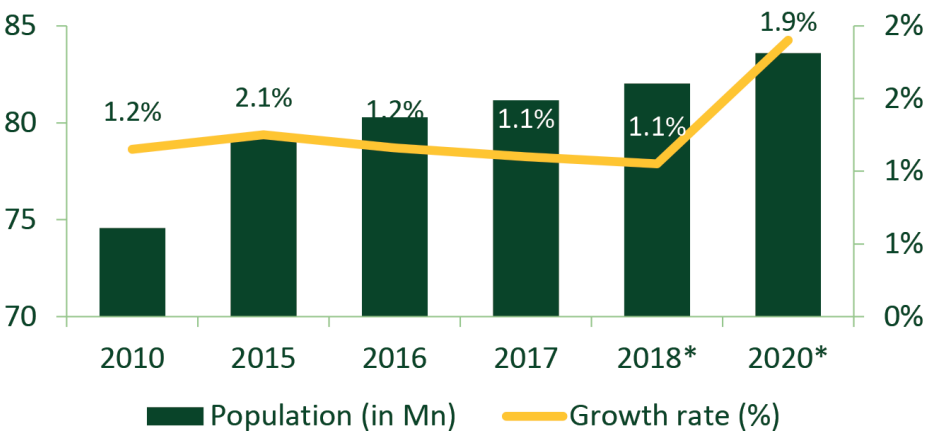
URBAN HOUSEHOLD F&B EXPENDITURE* (2017)



POPULATION DEMOGRAPHICS

Iran population is witnessing fast-pace growth, largely supported by people migrating from the surrounding countries (Afghanistan and Iraq) for security reasons. Tehran is the largest city by population, followed by Mashhad, Isfahan, Karaj, Tabiz, and Shiraz. A larger part of the country's ethnic groups include Persians and Azerbaijanis. In 2016, 15-64 was the largest age group in the total population in Iran, corresponding to 71.1% of the total population. Iran's young population is expected to account for 24% of the total population by 2050.

POPULATION SIZE AND GROWTH RATE (2010-20)



Note: *Estimated value
Source: The Economist, World Bank, Focus Economics, Euler Hermes, Conexio Consulting, Mondaq, BMI Research, Coface, CEIC Data, Financial Times, The Telegraph, Trading Economics.

F&B INDUSTRY

The total f&b market in Iran was valued at 33.2 billion US dollars in 2015, including the food market worth 30.4 billion US dollars and the beverage market worth 2.8 billion US dollars by value. Iran is the third largest country for sale of food processing and packaging machinery in Middle East. The export value of food products to Iran reached 2.1 billion US dollars in 2017, up by 8.0% compared to the previous year. In 2017, Iran's food industry accounted for 11% of all the value add created by the industrial sector with close to 11,200 businesses and a total value added of 4.3 billion dollars. Total sales volume of packaged food was 16.5 million tons in 2015 and the demand is expected to increase by 3% till 2020.

* For year ending March 2017
Source: American Iranian Council, News Articles, SGA primary research.

What local f&b companies say...

“We like that our internal team gets **trained**, and is **able to face technical issues** in case the machine is not working.”

“For our sector (bakery) we prefer to choose machinery which can **produce more than one product variety**.”

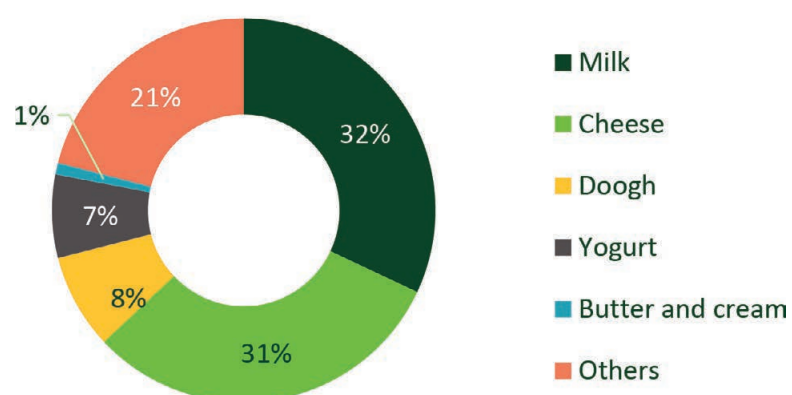
“We prefer Iranian machinery because they’re **less expensive**, and provide with **quick and good after-sale service assistance** locally.”

“The machinery we never wish to change are the ones with a **simple mechanism, easy to use for operators**.”

“We try to do as much **maintenance** as we can, by changing spare-parts, so that we can **postpone the purchase** of a new machinery.”

“The **less manpower** the machine requires, the more we would be **willing to purchase it**.”

PRODUCT SALES SHARE BY TYPE (2017)



Source: Ice

F&B MARKET - ANALYSIS BY SECTORS

BAKERY

Sales volume of baked goods amounted to 8.6 million tons in 2015, making it the largest segment within the packaged food category. In 2014, 96% of bakery sales were from staples such as bread. Packaged bread has gained popularity in Iran and is expected to grow by 19% until 2020. The industrial bakery sector in Iran is still very underdeveloped and Cenana bakery, the only large industrial bakery, is the market leader. As of 2017, industrial bread bakeries had a share of 20% in the total bread production in Iran, while the rest belonged to traditional bread bakers.

Major brands: Cenana, Tak Nan Jonoub, Delato, Lavash, Nanavaran, Pronan.

POULTRY

The demand for processed meat and seafood is gaining momentum in Iran and is expected to rise 24% by 2020. Iran produces over 2.0 million tons of chicken annually, making it one of the biggest producers of chicken in the world. While the country’s per capita yearly chicken consumption is 26-27 kg, the global average is 13-15 kg. Its chicken meat exports stood at 16,000 tons and worth more than 9.4 million US dollars between April and August 2017.

Major brands: Erpilic, Seamorgh eggs.

DAIRY

In 2015, dairy was the second largest segment under the packaged food & beverage industry, with a sales volume of 4 million tons. The local demand for dairy products is expected to increase by 12% till 2020. Dairy products had the biggest share in Iran’s total food exports in 2017 (March), shipping 773.0 million US dollars worth of dairy products, registering a 10% and 25% increase in volume and value, respectively, compared to 2015. Iran imported about 56,000 tons of dairy products worth 251.0 million dollars during 2016-2017.

This included 46,000 tons of butter worth 184 million dollars and 7,000 tons of milk powder worth 50 million dollars. The top five Iranian dairy companies are: Pegah (21% market share), Kalleh (16%), Damdaran (8.6%), Mihan (6.9%), and Alis (4%).

Major brands: Pegah pasteurized milk and cheese, Kalleh, Mihan, Damdaran, Pak, Danone, Nestle.

SOFT DRINK

The soft drinks sector was valued at 2.8 billion US dollars in 2016 and is projected to grow at a Cagr of 30% during 2015-2020. Iran’s retail value for soft drinks is the second largest of all Middle Eastern markets. The juice

and concentrate sector is registering the strongest growth. The production capacity of fruit concentrates is 11 million tons per year, while the production capacity of the 200 fruit juice units was 4.0 million tons annually in the year ended March 2017.

Major brands: Parsi cola, Topsia cola, Zam zam, Bit Malt.

BOTTLED WATER

500 liter bottles form close to 45% of all bottled water production in Iranian factories. Having access to tap water, less than 3% of all Iranians consume bottled water. Currently, there are around 140 registered bottled water producers. Iran has ~120 mineral water plants with average bottled mineral water capacity of about 1.3 billion liters per year. By March 2017, Iran exported 21,000 tons of mineral water worth 25 million dollars while the total value of mineral water imports was 7 million dollars, weighing 9,000 tons. Plant technology, including bottle making, is largely imported from European countries.

Major brands: Damavand and Amolo.

COOKING OIL

As of March 2017, Iran’s vegetable oil production capacity stood at 1.4 million tons. Annually, Iran produces and packages about 1.4 million tons of vegetable oil, 860,000 tons of which is solid and 650,000 tons is liquid. In 2017, Iranian vegetable oil export reached 51,000 tons or 76.7 million dollars. Compared to 2016, growing by 37% and 15% by volume and value, respectively. In 2017, Iran’s Food and Drug Administration announced that the import of cooking oils has been banned to support domestic production.

Major brands: Aftab, Aftab Talaei, Khorous, Ladan.

SNACKS

The cookies and chocolates import amounted to 131 million dollars in the year ended March 2017. Iran exported 194,000 tons of cookies and chocolates for 489.3 million US dollars, with a 10% and 2.5% growth in value and volume, respectively, in the year ended March 2017. The turnover in the cookies and chocolate sector is about 5 billion dollars per year, with per capita consumption of 20 to 21 kilograms.

Major brands: 7 Up, Chee Puff, Chee Toz, Mirinda, Munchips, Nik.Nak, Pepsi, Tortia.

FRUIT & VEG

Vegetables worth 160 million US dollars and fruits and nuts worth 568 million dollars were imported in the year 2016.

end

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the company

Year 3 • N.7/8
September • 2019

Tecno Pack, technological innovation

A renowned specialist in the design and building of complete automatic packaging lines based in Schio, in the province of Vicenza (Veneto).

by Eleonora Davi

Tecno Pack, innovazione tecnologica

Rinomato specialista nella progettazione e costruzione di linee complete di confezionamento automatico con sede a Schio, in provincia di Vicenza (Veneto), Tecno Pack è un punto di riferimento per gli utenti che cercano soluzioni personalizzate e un partner capace e sicuro. Innovazione tecnologica, affidabilità e serietà, infatti, sono le parole chiave di questa azienda, leader nel settore food, che offre soluzioni sempre al vertice del settore degli impianti e delle confezionatrici orizzontali flow pack.

Technological innovation, reliability and dedication to the client's service; top solutions for the plant and horizontal flow pack packaging machines industry. With all these qualities, Tecno Pak is a leading company in the food industry and can boast, among its clients,

some of the most important firms both at a national and global level. Brands such as Bauli, Nestlè, Barilla, Doria, E. Mauri, Baldi Carne, Buitoni and many others entrust Tecno Pack's machinery and equipment with the flow pack packaging of their products. Tecno Pack

is at the complete disposal of all the business operator, from small cheese factories to large processing plants. It always provides a top-class solution, a real tailored suit for every industrial packaging requirement in the small, medium and large food industry.

Two dedicated technological lines have been developed to satisfy as many sectors in need of features such as high sanitization, great flexibility in format changeover and reliability in all operating conditions.

FP 025 SUPER EVO

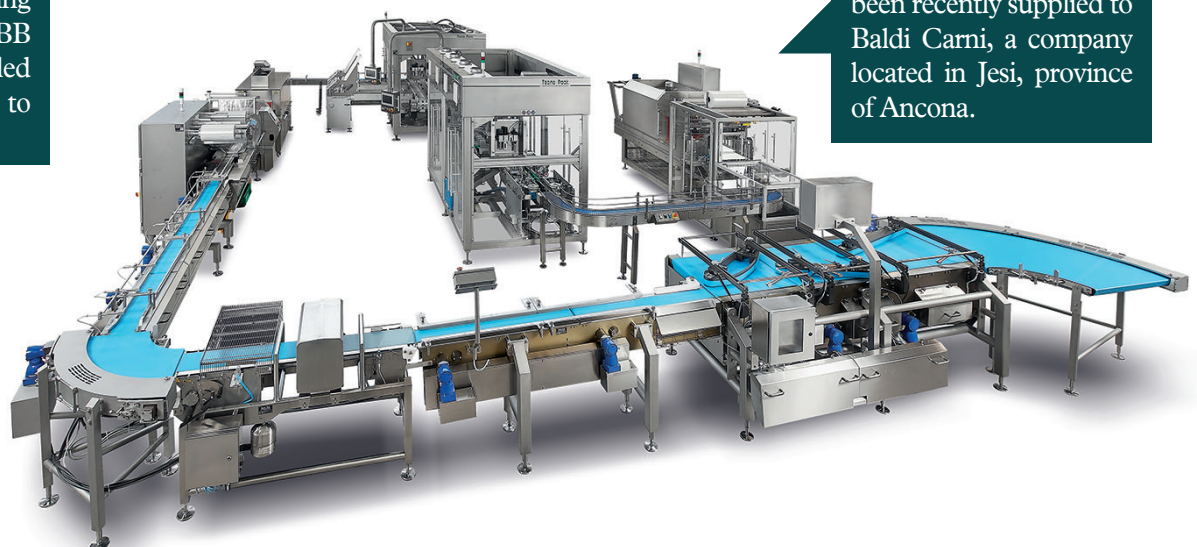
This kind of machine is ideal for the dairy sector and charcuteries. The FP 025 SUPER EVO range is perfect for cheese (both whole and portioned pieces) and cured meat packaging. It is available in several types and the process takes place in a controlled atmosphere that makes it possible to increase the shelf life of the products. As a result, also long-range sales are possible.

The handling of frozen meat burgers proceeds from high production lines

The technological offer is completed by the enormous potential of automatic interlocking of the packaging machines, from product loading to end-of-line; also in a modular and step by step way. In these sense, Tecno Pack staff is always prepared to consider the most suitable proposals together with its consumers to secure the right level of automation required. It also provides automatic and fully integrated solutions such as the fully automatic system for primary, secondary and tertiary packaging of frozen hamburgers which has been recently supplied to Baldi Carni, a company located in Jesi, province of Ancona.

FP 020 FULL INOX SUPER EVO

The line FP 020 full inox SUPER EVO has been designed to be used in harsh environments where mozzarella and soft cheeses are processed. It is possible to appreciate the complete sanitization of the machines together with all the advantages derived from the latest generation electronics and from the user-friendly and intuitive touch screen. This feature is entirely thought and developed in the company with the aim of enabling non-highly specialized personnel to always use it correctly. Cold cuts, cheese factories and the entire meat and milk processing chain as well can rely on the great adaptability and reliability of the FP 027BB INOX series that always guarantees a perfect and watertight bowl in a controlled atmosphere, a longer shelf life for cold cuts and cheeses and a perfect aroma to the end user.



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“Customisation is our trademark”

Since over 40 years, clients' needs are at the core of Agriflex's business, specialist in creating custom-made solutions for the food industry.

by Elisa Tonussi

Based in Forlì, in Emilia-Romagna, Agriflex has always been specialist in designing, manufacturing and installing systems for the storage, conveying, dosing and automation control of raw materials for the food industry. Since 1975, Agriflex has made of customisation and flexibility its hallmark, thanks to the know how and professionalism of its founder, Luciano Agri. With an annual growth rate of 20-25%, Agriflex is currently one of the leading Italian companies of the sector, with installations all over the world. In addition to the headquarters in Forlì, which extend 5 thousand covered square meters, the company can count on a specialist production facility of 5.400 square meters in Serravalle di Berra (province of Ferrara). Interview with the founder, Mr Luciano Agri.

How did Agriflex perform in 2018 and what about the first semester of 2019?

2018 was a very positive year - just like the last five -, with an average growth rate that kept steady between 20% and 25%. Given our constant growth trend and our solidity, we expect to repeat the same results also in the near future. In 2020, we are planning to hire another 5 to 8 new employees too, who will be integrated in a group of 80 people. We also wish to strengthen our branches abroad to further expand and increase our revenue.

How much do foreign markets affect your turnover?

Foreign markets generate 80% of our turnover. We manufacture many big systems for the Italian market too, but Agriflex's core business is export, with thousands of installations operating all over the world. South America and the Gulf region are the most consolidated markets, while Asia and the Far East are currently developing.



Which are Agriflex's features that distinguish your offer from your competitors'?

Agriflex has always adopted a customer-centred approach: any issue, necessity or target is a must. Throughout the different stages - analysis, solution, production, automation, continuous control and after-sales services - Agriflex is always ready to conceive, together with the customer, the most suitable solution for his needs. Every product is custom-made, according to each specific necessity. Agriflex handles directly in-house the overall coordination of the project: design, production, transportation, installation and commissioning. We also provide technical and commercial advice for the realisation of any aspect which is essential for our clients.

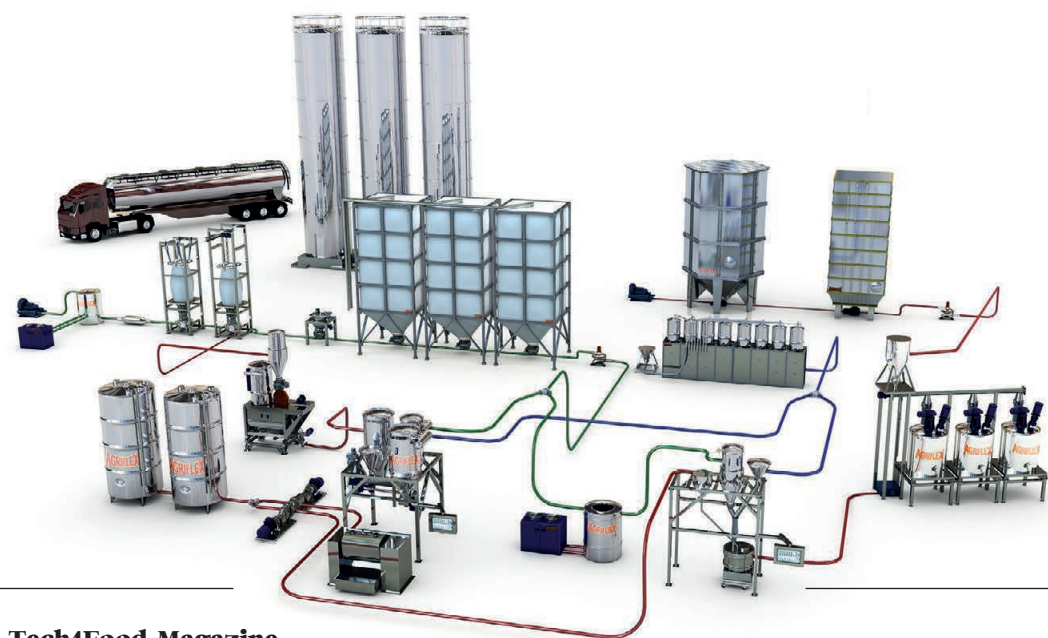
Which is your best-selling product?

Agriflex has progressed a lot throughout the years, both from the technological point of view and in the automation field. Some products also boast invention patents, such as the flour cooling system, which allows to lower the dough temperature by over 20°C and keeps it even. This patent has enabled many

companies to reduce operating costs, by completely automating the system, and to be highly energy efficient and effective, given the considerable temperature reduction. Fermenters are another cornerstone of the Agriflex production: industrial plants and standalone machinery for preparing natural liquid yeast, suitable for many types of flours and starters. Agriflex boasts another industrial innovation, too: the Esa Silos, which are manufactured using stainless steel panels coupled without internal tie rods and with external ribs, making the structure self-supporting, avoiding internal tie-rods and the consequent product accumulation inside the silo.

Which trade shows did you take part in and which ones are you going to attend in the forthcoming months?

Every year, Agriflex attends on average 12 trade shows in the world. They are opportunities to make a name for our brand, but also to be aware of new emerging markets, make new contacts and relations and strengthen the already existing ones. In further details, over the last years, Agriflex took part in trade shows in Milan, Algiers, Sao Paulo, Rennes, Cologne, Johannesburg, Birmingham, Monaco and Dubai. But also in Mexico, Thailand and Vietnam. From September 8th to 11th, Agriflex will participate in Ibie in Las Vegas, while from September 21st to 24th we will be present for the first time at Sudback in Stuttgart (Germany). To conclude 2019, Agriflex will join, like every year, Gulfood Manufacturing in Dubai from October 29th to 31st and Andina Pack, in Colombia, from November 19th to 22nd. In addition, Agriflex has already registered at AB Tech Expo in Rimini, Interpack 2020, Cifa Rennes 2020, Prosweets 2020, Foodex 2020, IBA 2021, Ipack-Ima 2021 and Anuga Food Tec 2021.



“La personalizzazione è il nostro marchio di fabbrica”

Da oltre 40 anni, le esigenze del cliente sono al centro dell'attività di Agriflex, specialista nella creazione di soluzioni personalizzate per l'industria alimentare. A un tasso di crescita annuo del 20-25%, l'azienda di Forlì è uno dei leader del settore con installazioni in tutto il mondo e brevetti. Come il sistema di raffreddamento farina, in scena a Ibie il prossimo settembre. Intervista con il fondatore Luciano Agri.

Iffa 2019: food safety is the key word

Hygienic design, sustainable skin-packaging, digitalisation and solutions designed to ensure much safer food. These are the top themes in the meat-processing industry.

by Eleonora Davi

Food safety, hygiene, waste prevention, sustainability, resource efficiency and traceability. They are the top themes discussed on the occasion of Iffa, the leading trade show targeting the meat industry that took place from May 4th to 9th 2019 in the exhibition area of Messe Frankfurt, Germany. In addition to new solutions designed to ensure greater food safety, companies presented the latest trends and developments in the meat-processing industry.

Food safety

Sustainability, in terms of resource usage and the employment of energy-efficient processes long the entire value chain, is one of the foremost challenges of our time. And this applies to the meat-processing industry, too. The manufacture of safe and hygienically acceptable products is a matter of top priority in the butchering and meat processing trades. To exclude the risks of microbiological contamination, or at least to reduce them, principally in areas where there is direct contact between the workforce and the products, it is necessary to replace manual activity with automated processes as extensively as possible.

Digitalisation

Optimising production processes is increasingly based on digitalisation and interlinked networks. Increasing production security and optimising machinery usage is the objective. In fact, in the 'smart factory' products and machines must communicate with each other and organise, regulate and monitor themselves. In order to guarantee so, it is important to have ready availability, at all times, of status data on products, machinery and so on. This task is undertaken by 'smart sensors', which include integrated micro-processors for processing and analysing the signals. They record temperature, power usage, torque, pressure, gases and microbial contamination. Furthermore, thanks to the help of intelligent sensors, possible malfunctions can be resumed in real time through noises or sudden vibrations. Irregularities are monitored online and evaluated through a condition monitoring software.

Hygienic design

Reducing human input into the manufacturing process is very important. But first and foremost, in terms of hygiene it is also important that devices, appliances, machines and installations are built according to the principles of hygienic design. According to these prescriptions, it is important to avoid dead spaces, undercuts, depressions and crevices

SMART MANUFACTURING CAN IMPACT FOOD AND BEVERAGE MANUFACTURERS WITH:

- Better information at the right time
 - Food safety
- Supply chain seamlessness
 - Responsivity
 - Customization
 - Less waste
- Process improvement

where residues of products that create fertile soil for the onset of microbes could easily deposit. Additionally, hygienic design is about making machinery and plant cleaner-friendly, so that they can be cleaned more easily, more thoroughly, more quickly and in a way that is more sparing of resources. It means that cleaning materials and disinfectants can drain off unhindered.

Metal detectors and X-ray technology

Another important component of the guarantee of greater food safety is the introduction of technologies that can detect the presence of foreign bodies in meat and cold cuts. In fact, during each phase of the manufacturing and packaging process, part

of machines and plants can break or detach and end up in the products. Metal detectors and X-ray equipment can help. They can detect foreign bodies such as ferrous metals inside food and packaging and they can be used to spot foreign matters like stones, glass, bone or plastic that can appear in products. Then, both monitoring system can be link to a rejection system, in order to remove contaminated or deficient products from further processing stages automatically. In this way it is possible to check for any inconsistencies in terms of completeness, weight, capacity and shape.

Focus on smart packaging

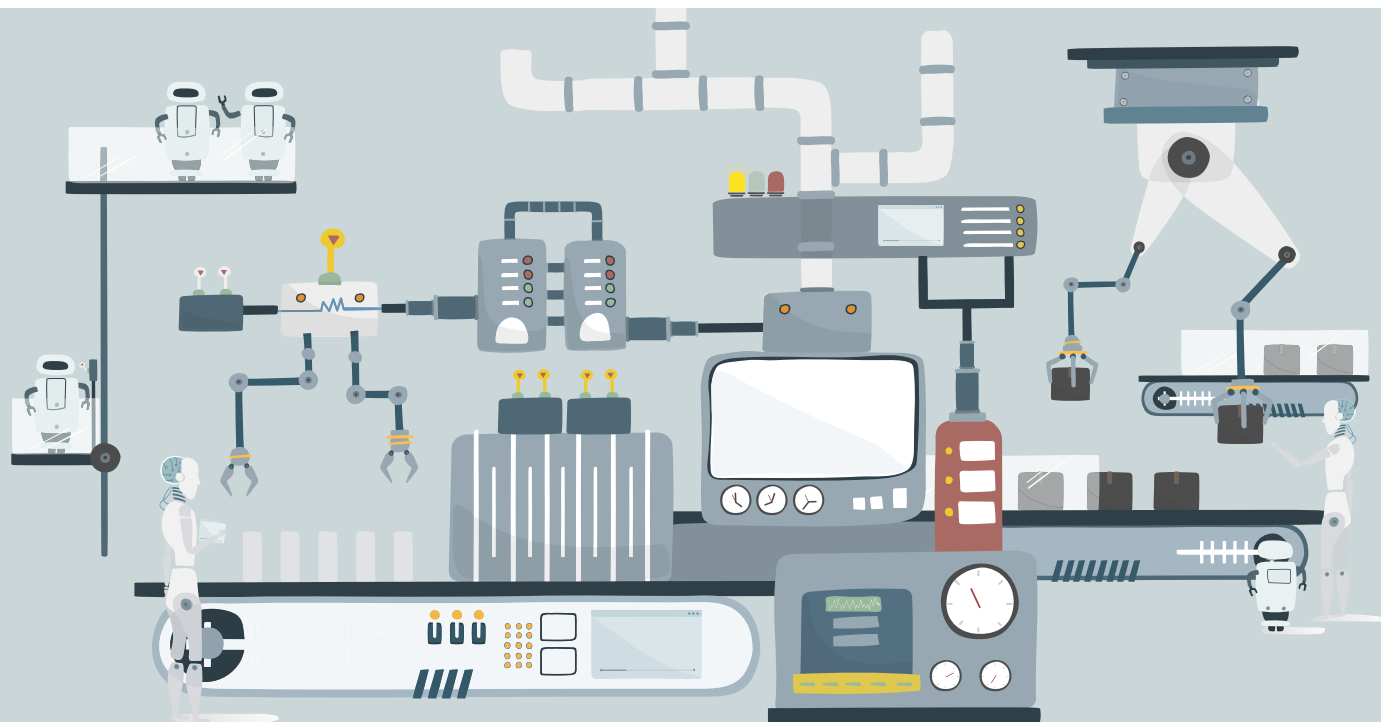
As well as packaging machines and plants, packaging materials, especially those that are easily perishable such as meat and cold cuts, require very high standards. Multifunctional, active and intelligent packaging opens up new perspectives for the meat industry. It monitors and records the environmental influences to which the product has been subjected along the value chain after the packaging stage. Integrated time-temperature indicators reveal the current quality status, degree of freshness, any breaches of the cool chain and whether the product is still suitable for consumption. Modified atmosphere packaging for meat and cold cuts is evolving into the standardization of the meat-processing industry, also because it extends the shelf-life of the product. The reduction of packaging and the use of recyclable packaging are two issues that focus on consumer attention. Nowadays, modern packaging machines have evolved and allow the parameters of the films to be set precisely for more economical processing. The innovative packaging in Skin-Pack, therefore, which uses cardboard as a support for the product, allows the presentation of the product in an elegant way, prolonging storage times and reducing material consumption.

Food safety is also protection against food fraud

To ensure better food safety and product authenticity it is necessary to resort to a universal, digitalised and tamper-proof traceability system. In fact, traditional analytic procedures are too complicated, laborious and time-consuming. The fight against food fraud demands flexible, sufficiently accurate and rapid testing methods that are mobile and can be used continually in-line. An example of this is non-invasive Nir spectroscopy which allows to check the quality and identity of incoming goods in just a few seconds, even in the case of products packaged in glass or in trays.

Parola d'ordine: sicurezza alimentare

Sicurezza degli alimenti, igiene, riduzione dei rifiuti, sostenibilità, efficienza delle risorse e tracciabilità. Sono i temi affrontati in occasione dell'ultima edizione di Iffa, fiera leader dell'industria della carne a livello internazionale, andata in scena negli spazi espositivi di Messe Frankfurt, dal 4 al 9 maggio 2019. Oltre a nuove soluzioni tecnologiche per una maggiore sicurezza alimentare, le aziende hanno presentato le ultime tendenze del settore della carne. Fra tutte, spicca la smart factory che, con soluzioni automatizzate e software all'avanguardia, rende la produzione e i processi più intelligenti, efficaci e sicuri. La sicurezza alimentare, infatti, è il tema centrale. A tal proposito, nel settore del confezionamento, sono state presentate soluzioni intelligenti per proteggere gli alimenti.



Italy, the land of robots

In 2018, the number of automatic machines in the country increased of 9,237 units, 11,5% more than in 2017. A report from the International Federation of Robotics.

by Eleonora Davi

A boom in robots is taking place in Italy. Compared to 2017, 2018 has been a record-breaking year for the number of automatic machines set up in the country, where there are 9,237 robotic systems in manufacturing plants. During the decade 2008-2018, the number of robots has increased of 7,3%. In fact, ten years ago, the number of automatic machinery was 4,556 units. It has more than doubled compared to the previous 10-year period. The most challenging statistic was presented by Ucimu-Siri during the press conference at Lamiera, the international exhibition dedicated to sheet metal forming machine tool industry and to all innovative technologies related to the sector, held on May 17th, in the Fiera-Milano fair district (Rho). So, a growing demand that has been increasingly driven by handling materials sector. This is what arose in the International Federation of Robotics' report.

Production

During 2018, the Italian production reached 3,460 units with an increase of 28,7%, in respect of 2017. The Italian export sector was also positive. With 2,042 units it grew of 39,7%. But undoubtedly, the most striking result is that related to consumption. 85% of domestic demand was met by imports, which grew by 10,8% compared to the previous year.

Italy's progress in process automation is therefore confirmed by this survey. But the Calenda plan on Industry 4.0 has also revitalized the sector thanks to tax incentive plans. Compared to the rest of the world where the global growth rate was just 1%, Italy has been able to continue with a growth path that in other countries has been interrupted. For example, Beijing has seen a decrease of almost 5 thousand units. As well as Korea. While for Taiwan volumes are slightly higher than in 2017. The situation is better in Europe and America which respectively grow by +7% and +6%.

Robots application fields

The main field of application of automatic machines is handling, with a total share of 76% that is stable compared to 2017 when it was 77%. Followed by welding, which grew by 8,1% than in the previous year, and represents 10% of the total. In particular, handling material remains the first area of detail application with a total share of 38,7% of the specific segment, followed by loading and unloading machines (24%) and palletizing (17%). A marked increase compared to 11, 9% of 2017.

Benefits and drawbacks

From the standpoint of 4.0 applications, the Italian scenario is very dynamic. The main benefits indicated by the companies

concern: a better manufacturing flexibility, the increase of the plant efficiency, the reduction of design time and the opportunity to develop innovative products. Concerning drawbacks, the most common difficulties relate to organizational issues and skills management, change management difficulties and dissatisfaction with the offer.

Future forecasts

For the year 2019 forecasts are a little bit cautious. Ucimu and Siri provide for an increase of +5%. In general, the most interesting growth rates relate to collaborative robotics, which represents one of the major changes in the automatic machines industry. Proximity to humans, assistance with heavy and repetitive tasks, ease of programming and reduced costs are some of the robots winning weapons. In fact, opposite to popular belief, industrial automation doesn't hurt labour demand. On the contrary, it reduces production costs with the consequent products price reduction and rise in demand and occupation. The massive integration of automation certainly generates many fears. Of course there are worries that these applications may reduce workplaces. But we must remember that these technologies were not only born to increase efficiency, but also to relieve operators of the most unpleasant activities.

THE IFR SURVEY

According to a survey conducted by IFR (International Federation of Robotics) Italy ranks tenth in the world in terms of industrial robots intensity use and fifth in Europe for machine density every 10,000 employees. Our nation is therefore leader in the development of robotics and industrial automation.

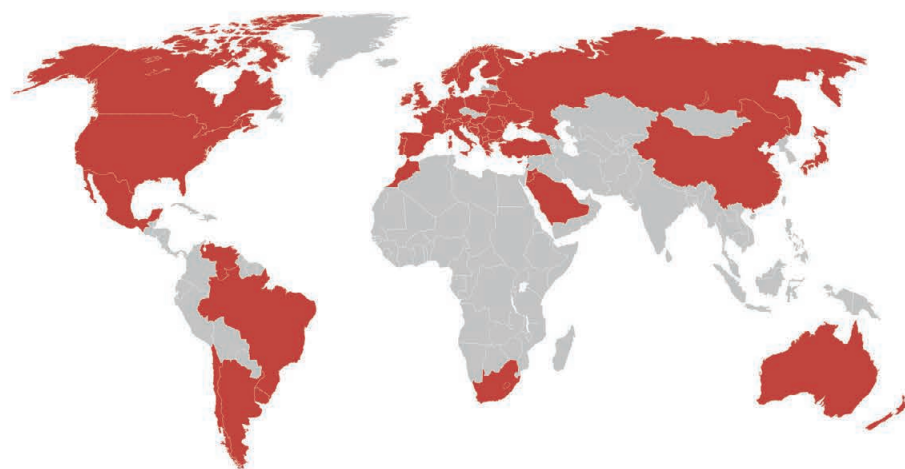
INDUSTRY, THE FOOD SECTOR IS IN POLE POSITION

In Italy the turnover generated by manufacturers of automatic packaging and packaging machines recorded an increase of 9,4% and reached 7,85 billion euros. In the turnover breakdown of the various customers, 2018 confirms a predominance of the food industry. Considering the subdivision of the turnover of each client sector between sales in Italy and abroad, food becomes the sector with the highest share of domestic sales.

Italia, il paese dei robot

Nel 2018, il numero di robot installati in Italia è cresciuto a 9,237 unità, pari all'11,5% in più rispetto al 2017. Le vendite globali di macchine automatiche industriali hanno raggiunto il valore record di 387mila unità nel 2017, mettendo a segno una crescita del 31% rispetto al 2016, per un volume d'affari complessivo valutato in 50 miliardi di dollari.

TRAVAGLINI IN THE WORLD: WE ARE IN MORE THEN 54 COUNTRIES



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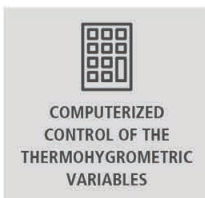
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VARIABLES



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UNIFORM AIR
REGULATION



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FOR PRODUCTS LOADING
AND UNLOADING



AUTOMATIC SYSTEM
FOR PRODUCTS
HANDLING



INTEGRATED
SUPERVISION
SYSTEMS



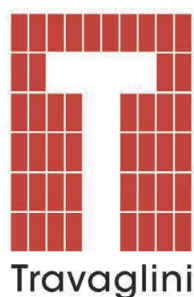
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- INVERTER
- AIR DEFROSTING SYSTEM
- DIRECT COUPLING MOTOR/FAN
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Security: a steep bill for retailers

An overview on losses, threats and solutions to make stores safer.

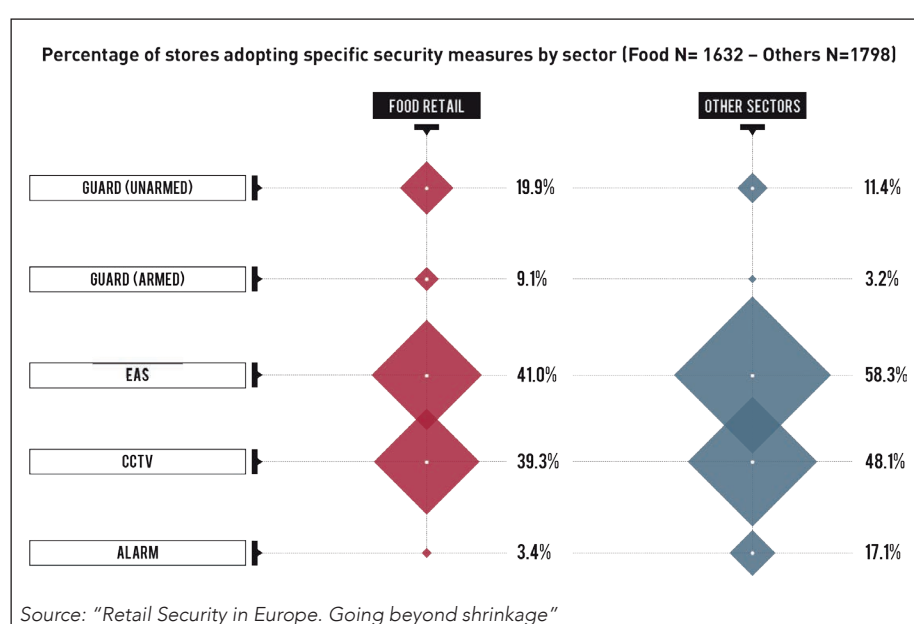
A report of the Università Cattolica of Milan highlights the need of better understanding criminal patterns and combining countermeasures. Focus on the Italian situation and the food sector.

by Elisa Tonussi

Retail security is a major issue in Europe. Losses account for 2.1% of retail sector turnover. 49 billion euros per year. If it were a company, it would be the fourth largest in Europe, according to the report 'Retail Security in Europe – Going beyond shrinkage'. Presented on June, 20th, on the occasion of the conference titled 'Retail security in Europe', the study was carried out by Crime&Tech, spin-off company of the Università Cattolica del Sacro Cuore – Transcrime, with the support of Checkpoint Systems. It is an overview of the losses incurred by retail companies, of the threats of retail security and on the countermeasures adopted by 11 European countries.

The study

The report is the result of the cooperation between academic researchers and retailers, who contributed providing data and insights. Researchers adopted a ground-breaking approach. Almost 23 thousand shops in 11 European countries were involved. 1.600 media news were analysed and 40 bilateral interviews were conducted with retailers and academic. To gather enough data at sector, company, store and incident level on the evolution of crime, its characteristics and the solutions adopted. Not only shrinkage data were considered. The geographical and sectorial context in which retailers operate, the modi operandi and crime schemes were taken into account too, in order to have a comprehensive overview of the phenomenon in Europe. The economic impact of retail losses on firms and citizens were also analysed. In fact, 49 billion euros per year are lost due to losses: the economic impact is equal to 35 billion euros (863 euros per capita) and the expenditure in security measures values 14.5 billion euros (26 euros per capita).



La sicurezza costa cara ai retailer

Proteggere i negozi in Europa è un problema. Una panoramica su perdite, minacce e soluzioni per rendere più sicuri i negozi, il rapporto dell'Università Cattolica di Milano mette in luce la necessità di comprendere meglio i modelli di comportamento criminale e di combinare diverse misure di sicurezza. Un focus sulla situazione in Italia - che con 4,8 miliardi di euro di perdite all'anno si posiziona quarta tra i paesi analizzati - e nel settore alimentare, il più colpito in Europa.

Shrinkage: trends, patterns and causes

Shoplifting and robberies. They are the main causes of shrinkage, which, in 2017, was equal to 1.5% of retailers' turnover. Yet, shrinkage rates vary widely across business sectors, with food retail recording the highest rate: 2%. Micro-gangs, single individuals or simply costumers commit their crimes by grabbing and running, removing tags and labels, or exploiting technology. Jammers and booster bags, for example, allow criminals not to be detected by Eas antennas. Employee thefts and frauds also impact significantly on losses. In addition to some time and space factors. Indeed, the highest number is recorded in shopping malls or larger stores, equipped with self-checkout services, near tube or train stations, located in populous and low-income areas.

Especially when new collections and products are launched, during seasonal holidays (eg. at Christmas) and on weekends. Finally, the cold season favours criminal behaviours affecting losses, as it's easier to steal and hide goods and weapons.

The Italian case

Italy, for sure, is not a safe country for retailers, who lose on average 4.8 billion euros every year: 3.3 billion euros due to shrinkage, while 1.5 billion euros is the expenditure in security measures. Therefore, Italy ranks fourth in Europe for retail losses, preceded by the United Kingdom, France and Germany. With Genoa, Milan, Bologna, Naples and Imperia, being the least safe cities. Like in the rest of Europe, shoplifting is the most widespread cause of shrinkage. And it is expected to increase in the future.

Moreover, robberies against business premises are the highest among all the European countries analysed. As for patterns and modi operandi, data gathered in Italy are consistent with the European trends. In fact, food retail and cash&carry record the highest loss rate: almost 1.7 billion euros in 2017. A 0.1% increase compared to 2015. While in the past saffron was the most stolen item, now alcoholic drinks, in particular expensive wines and liquors, take the lead. Together with canned food, especially tuna, cosmetic and perfumes. Cheese and meat, instead, are reported to be stolen and resold on the black market to individuals, restaurants and catering firms.

Solutions and countermeasures: a long way to go

Fighting and preventing losses is not an easy task. Retailers already spend 0.61% of their annual turnover on security measures. Cctv and Eas (electronic article surveillance) are the most commonly adopted solutions, followed by third-party alarms. In addition, few, and usually large, stores also turn to armed and unarmed guards. However, solutions are often used in combination. Especially by food retail companies, that pay out 0.6% of their turnover on security measures, usually combining Cctv and Eas. Despite all efforts, a better understanding of criminal behaviours and schemes is necessary. In fact, they impact not only on losses, but also on customer security and, most of all, on perceived security, which is key to sales results. How to do so? Encouraging dialogue and discussion among all company departments, gathering more data and sharing information and solutions, in order to increase staff awareness and finding new ways to combines countermeasures and improve them. There is still a long way to go.

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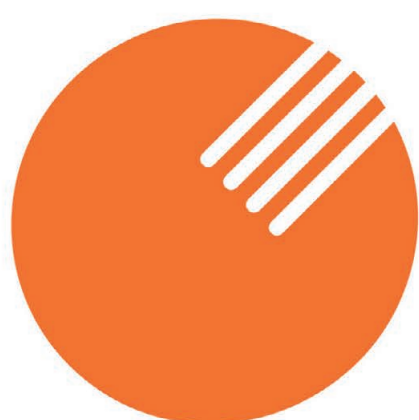
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