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THE ITALIAN FOOD MAGAZINE

BUYER'S • GUIDE

YEAR 7 - N° 9 • OCTOBER 2019
MANAGING DIRECTOR: ANGELO FRIGERIO

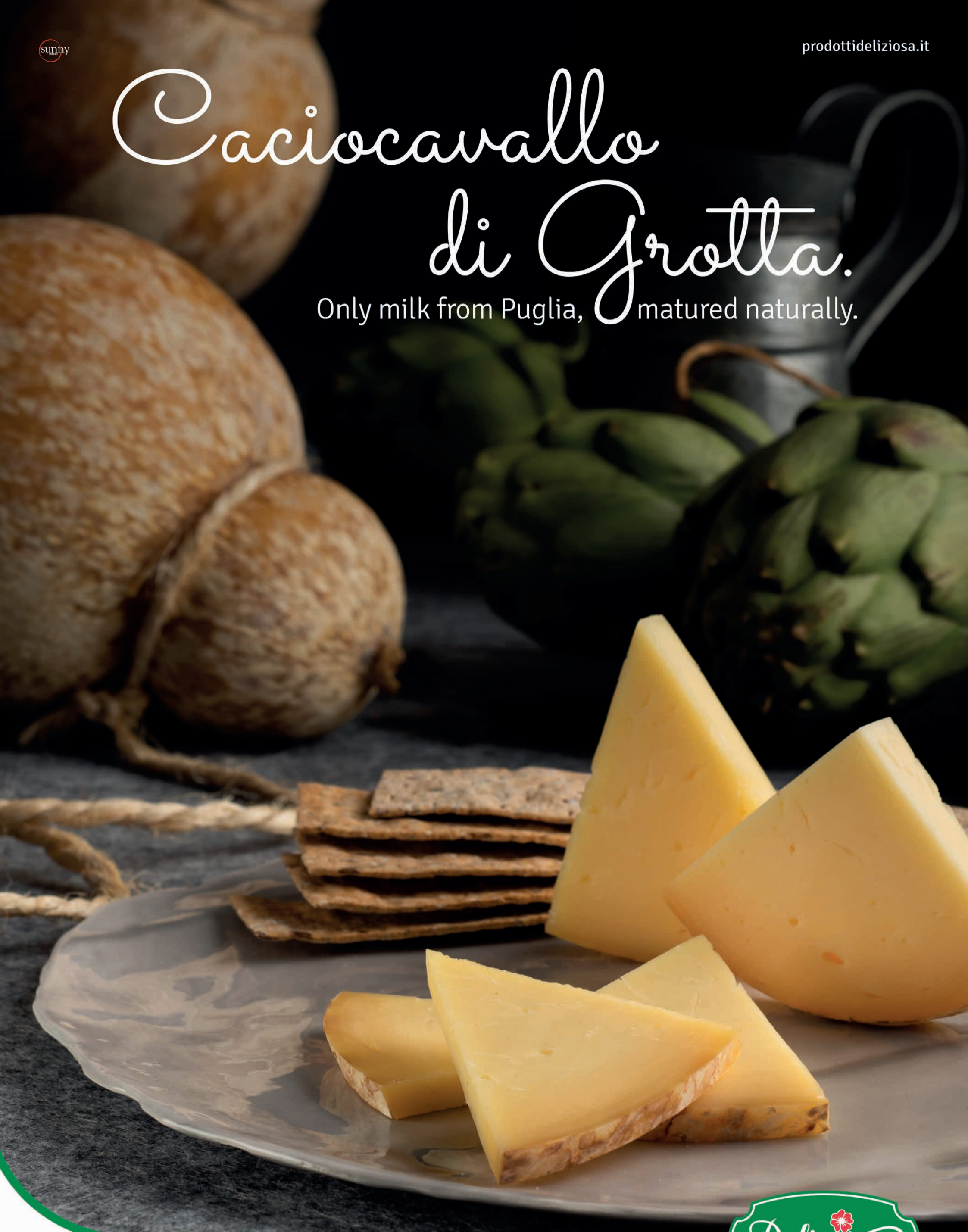


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EDITORIAL

by Angelo Frigerio, managing director

ITALIAN FOOD IN THE WORLD: DATA AND STATISTICS

How much is Italian food worth globally? The answer is easy: 41 billion euros per year in 2018 and it is growing by +1.4%. But, to know where it goes and where it hails from, and which are the major end markets and the most appreciated products, it is necessary to consult the study 'L'agroalimentare italiano nel mondo', 'The Italian agri-food industry in the world'. Which was carried out by the Chamber of commerce of Milano Monza Brianza Lodi and Coldiretti Lombardia, in collaboration with Promos Italia on agriculture, fishing, farming and the food and beverage industry, tobacco and silviculture excluded.

Germany, France, the United States and the United Kingdom are the the main end markets. Germany ranks first (+1.6%), followed by France (+4.3%), the United States (+4%) and the United Kingdom (+1.6%). Also Poland (+6.3%), Sweden and Australia (+3.8%) are among the first 20 countries. While Japan and Russia grow slower, and China slows down. Germany and France are the first buyers of almost all products, but the United States rank first for wine (+4%), mineral water (+7.4%) and oil imports, Spain for fresh fish, the Phi-

lippines (+36.4%) and Greece (+7.1%) for pet food, and the United Kingdom for livestock and animal products (+33.1%).

The United Kingdom ranks second for processed fruit and vegetables and for ice-creams, Austria third for cereals and rice. Poland (+23.3%), Australia (+18.5%), but also France (+10.1%) grow rapidly as far as wines are concerned, Indonesia for pet food (+100.7%), China for chocolate, spices and coffee (+21.7%), Canada for cheeses (+27.2%), Russia for pasta (+43.5%), Spain for fruit (+22.5%) and grains (+13.6%), Croatia for oil (+35.2%), Slovenia and Vietnam for meat (around +17%), Hungary for processed and canned fish (+44.1%) and Portugal for aquaculture products (+209%).

Food made in Italy is appreciated and proves right to drive Italian economy, together with fashion and tourism. Companies taking part at Anuga – which will be held in Cologne from October 5th-9th and where Italy is the first Country for number of participants – confirm this trend. The new government has the duty to give value to this immense asset.

Angelo Frigerio

IL CIBO ITALIANO NEL MONDO: DATI E STATISTICHE

Quanto vale il cibo italiano nel mondo? La risposta è semplice: 41 miliardi di euro all'anno nel 2018 e cresce del +1,4%. Ma per sapere dove va e da dove parte l'export, quali sono i maggiori mercati di sbocco e i prodotti più apprezzati è utile consultare la mappa: 'L'agroalimentare italiano nel mondo', realizzata dalla Camera di commercio di Milano Monza Brianza Lodi e Coldiretti Lombardia, con Promos Italia sui settori dell'agricoltura, della pesca, dell'allevamento, dell'industria alimentare e delle bevande, esclusi sil-

vicoltura e tabacco.

Germania, Francia, Stati Uniti, Regno Unito sono i maggiori mercati per l'export. Prima la Germania (+1,6%) seguita da Francia (+4,3%), Stati Uniti (+4%) e Regno Unito (+1,6%). Tra le prime 20 in crescita anche Polonia (+6,3%), Svezia e Australia (+3,8%). Aumenti più contenuti per Giappone e Russia, rallenta la Cina. E se la Germania e la Francia sono i primi acquirenti per quasi tutti i prodotti, gli Stati Uniti eccellono per vini (+4%), acque minerali (+7,4%) e oli, la Spagna per pesce fresco, le Filippine (+36,4%)

e la Grecia (+7,1%) per pet food, il Regno Unito per animali vivi e loro prodotti (+33,1%).

Il Regno Unito al secondo posto per frutta e ortaggi lavorati e conservati e per gelati, l'Austria al terzo per cereali e riso. In forte crescita per vini la Polonia (+23,3%) e l'Australia (+18,5%) ma anche la Francia (+10,1%), l'Indonesia per alimenti per animali (+100,7%), la Cina per cioccolato, caffè e spezie (+21,7%), il Canada per formaggi (+27,2%), la Russia per la pasta (+43,5%), la Spagna per frutta (+22,5%) e granaglie (+13,6%), la

Croazia per oli (+35,2%), la Slovenia e il Vietnam per carni (+17% circa), l'Ungheria per pesci lavorati e conservati (+44,1%) e il Portogallo per i prodotti di acquacultura (+209%).

L'alimentare Made in Italy piace e si conferma, con la moda e il turismo, uno dei vettori dell'economia italiana. Le aziende che partecipano ad Anuga - evento che si tiene a Colonia dal 5 al 9 ottobre, dove l'Italia è la prima nazione per le presenze in fiera - ne sono la conferma. Al nuovo governo, il compito di valorizzare questo immenso patrimonio.

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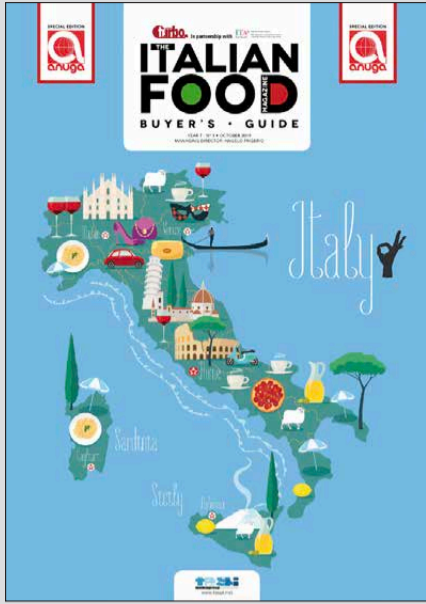
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NEWS

SARDINIAN MILK IN CHINA: A 41 MILLION EUROS AGREEMENT



The agreement between Invitalia and Alimenta was signed a few days ago: a development contract of 41 million euros, of which 12.2 were granted by the Development Agency and 2.1 million euro by the Sardinia Region. In the municipality of Borore (province of Nuoro) it will be built a plant to produce dried milk for children destined to the Chinese market. Alimenta is a leading player. 60% is controlled by Blue river dairy, an Hong Kong company, and 40% by the Sardinian group Cualbu which operates in the real-estate sector. The new website will be technologically advanced: over half of the investments fall under the innovations of the Industry 4.0 national plan. Therefore, the current production site will be completely replaced, no longer compatible with the company's growth programs and with the quality level of the products. The development plan will lead to the creation of 29 new jobs, which will become 80 at full capacity. But there will also be positive repercussions on the entire supply chain and related industries, consisting of Sardinian breeders and local producers active in the dairy processing sector, from which Alimenta buys serum. Within 2022, 10.400 tons of dried milk for children (sheep, goat and cow milk) and 3.400 tons of basic formulations will be produced. Products will start from the factory already packaged and will all arrive on the Chinese market, where there is a growing demand for product: from 123 thousand tons in 2014 to 303 thousand in 2017. Estimates for 2018 also show a further increase in imports, and according to forecasts the Chinese milk powder market will be worth 5 billion dollars in 2023, with a growth of about 25% from 2018.

Latte sardo in Cina: accordo da 41 milioni di euro

È stato siglato nei giorni scorsi l'accordo tra Invitalia e Alimenta per un contratto di sviluppo da 41 milioni di euro, di cui 12,2 concessi dall'Agenzia per lo sviluppo e 2,1 dalla Regione Sardegna. Nel comune di Borore (provincia di Nuoro) sarà realizzato uno stabilimento per produrre latte in polvere per bambini destinato al mercato cinese. Protagonista è Alimenta, controllata al 60% da Blue river dairy, società di Hong Kong, e per il 40% dal gruppo sardo Cualbu, attivo nel settore immobiliare. Il nuovo sito sarà tecnologicamente all'avanguardia: oltre la metà degli investimenti rientrano nelle innovazioni del piano nazionale Industria 4.0. Verrà quindi completamente sostituita l'attuale sede produttiva, ormai non più compatibile con i programmi di crescita dell'azienda e con il livello qualitativo dei prodotti. Il piano di sviluppo porterà alla creazione di 29 nuovi posti di lavoro, che a pieno regime diventeranno 80. Ma ci saranno anche ricadute positive sull'intera filiera e sull'indotto, costituito dagli allevatori sardi e dai produttori locali attivi nel settore della trasformazione lattiero-casearia, da cui Alimenta acquista il siero. Entro il 2022 verranno prodotte 10.400 tonnellate di latte in polvere per bambini (ovino, caprino e vaccino) e 3.400 tonnellate di formulati base. I prodotti partiranno dallo stabilimento già confezionati e approderanno tutti sul mercato cinese, dove si registra una crescente domanda di prodotto: dalle 123mila tonnellate del 2014 si è passati alle 303mila del 2017. Le stime per il 2018, inoltre, evidenziano un ulteriore incremento delle importazioni, e secondo le previsioni il mercato cinese del latte in polvere varrà 5 miliardi di dollari nel 2023, con una crescita di circa il 25% dal 2018.

SPERLARI: NEW HEADQUARTERS IN MILAN TO RELAUNCH THE COMPANY GLOBALLY

Sperlari, a 183 years old Italian confectionery brand, inaugurates new offices in Piazza Duomo in Milan. A structure that supports the historic site of Cremona and which represents - thanks to the central role that the Lombard capital plays in the Italian and international economy - a showcase for relaunching the company in the world. The new spaces were designed by Il Prisma, with shared work areas and very strong graphics, conceived and created by Publicis Group to recall the history and company values, in addition to the link with Cremona. "Landing in the heart of Milan represents an important step in our Sperlari relaunch project in Italy and around the world", declared Piergiorgio Burei, CEO of Sperlari. "We designed and built the offices where we would like to work: open, bright, functional but also rich in areas to work together. The choice of Milan naturally reinforces Sperlari's international projection and our determination to continue to grow in markets around the world". These days, the company has also confirmed its role as main sponsor of the Cremona Torrone Festival (16-24 November).

Sperlari: nuova sede a Milano, base per il rilancio internazionale

Sperlari, da 183 anni noto brand del dolciario italiano, inaugura nuovi uffici in Piazza Duomo a Milano. Una struttura che affianca la sede storica di Cremona e che rappresenta - grazie al ruolo centrale che il capoluogo lombardo riveste nell'economia italiana e internazionale - una vetrina per il rilancio dell'azienda nel mondo. I nuovi spazi sono stati progettati dalla società Il Prisma, con aree di lavoro condiviso e una fortissima personalità grafica, ideata e realizzata da Publicis Groupe per richiamare la storia e i valori aziendali, oltre al legame con Cremona. "Lo sbarco nel cuore di Milano rappresenta un passo importante nel nostro progetto di rilancio di Sperlari in Italia e nel mondo", ha dichiarato Piergiorgio Burei, Ceo di Sperlari. "Abbiamo disegnato e realizzato gli uffici dove ci piacerebbe lavorare: aperti, luminosi, funzionali ma anche ricchi di aree accoglienti per lavorare insieme. La scelta di Milano rafforza naturalmente la proiezione internazionale di Sperlari e la nostra determinazione nel continuare a crescere nei mercati di tutto il mondo". In questi giorni, la società ha annunciato anche di aver confermato il ruolo di main sponsor della Festa del Torrone di Cremona (16-24 novembre).

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EU COMMISSIONER MALMSTROM: COMMITMENT TO AVOID DUTIES ON ITALIAN FOOD IN THE US

The European Commission "is firmly determined to find a negotiated solution with the US, to put an end to the dispute over subsidies to the aeronautical sector and thus avoid the imposition of additional tariffs on EU agri-food exports". This is highlighted in a letter that, also on behalf of the president of the Brussels executive, Jean-Claude Juncker, the



EU commissioner for trade, Cecilia Malmstrom, addressed to Massimiliano Giansanti, the president of Confagricoltura. In a letter sent to the Commission, Giansanti had highlighted the heavy repercussions that a trade war between the EU and the US would have for the entire Italian agri-food supply chain. Due to the dispute over public subsidies to the European Airbus group and to the American Boeing group, the United States has compiled a list of products

imported from the Union, for a value of about 24 billion dollars, to be subjected to additional duties up to 100% of the value. The list, recalls Confagricoltura, includes the leading productions of agri-food made in Italy for a value of over 2 billion dollars. "More than half of Italian exports in the sector risk being subjected to additional customs tariffs," added the Confederation. "Wines, cheese, olive oil and pasta are the products most at risk".

La commissaria Ue Malmstrom: impegno per evitare dazi sull'agroalimentare italiano negli Usa

La Commissione europea "è fermamente determinata a trovare una soluzione negoziata con gli Usa, per mettere fine alla disputa sui sussidi al settore aeronautico ed evitare così l'imposizione di tariffe aggiuntive sulle esportazioni agroalimentari della Ue". È quanto evidenziato in una lettera che, anche a nome del presidente dell'esecutivo di Bruxelles, Jean-Claude Juncker, la commissaria Ue al commercio, Cecilia Malmstrom, ha indirizzato al presidente di Confagricoltura Massimiliano Giansanti. In una missiva inviata alla Commissione, Giansanti aveva messo in evidenza i pesanti contraccolpi che una guerra commerciale tra Ue e Usa avrebbe per l'intera filiera agroalimentare italiana. A causa della disputa sui sussidi pubblici al gruppo europeo Airbus e a quello americano Boeing, gli Stati Uniti hanno stilato una lista di prodotti importati dall'Unione, per un controvalore di circa 24 miliardi di dollari, da sottoporre a dazi aggiuntivi fino al 100% del valore. La lista, ricorda Confagricoltura, include le produzioni di punta del made in Italy agroalimentare per un valore di oltre 2 miliardi di dollari. "Oltre la metà delle esportazioni italiane di settore rischia di essere sottoposta a tariffe doganali aggiuntive", si legge nella nota della Confederazione. "Vini, formaggio, olio d'oliva e pasta sono i prodotti più a rischio".

EXPORT, THE ITALY-CHINA AGREEMENT ON FROZEN PORK IS OPERATIVE

Chinese customs authorities approved the health certificate for the export of frozen pork and Italian slaughter by-products to China, defining a first list of Italian slaughterhouses authorized to export. In this way, the recent agreement between Italy and China that promotes the export of Italian frozen pork to Beijing is operative. "The opening of the Chinese market is a positive sign for the swine sector but also for all the Italian animal husbandry field, which we strongly wanted and that comes just at the moment when the trade war between the US and China is intensifying", commented the president of Confagricoltura Massimiliano Giansanti. "It is desirable now," said Claudio Canali, president of the Federation of pig breeding of Confagricoltura, "that the national health certificate will be launched quickly which will allow the first shipments to China to be made". The export of fresh and frozen Italian pork to China, at the moment, has a marginal value (about 105 thousand euros in 2018), realizing only 0.01% of the total European exports, of which almost 80% are concentrated in four EU countries; there would therefore be a large margin of growth. "The Italian-Chinese agreement on pork is even more important", concluded Mr Giansanti, "to advance the other dossiers being discussed between the parties, starting with the export of beef".

Export, operativo l'accordo Italia-Cina sulle carni suine congelate

Le autorità doganali cinesi hanno approvato il certificato sanitario per l'esportazione in Cina di carni suine congelate e sottoprodotti della macellazione di provenienza italiana, definendo una prima lista di macelli italiani abilitati a esportare. Ottiene così concreta operatività il recente accordo tra Italia e Cina che favorisce l'esportazione di carne suina congelata italiana a Pechino. "L'apertura del mercato cinese è un segnale positivo per il settore suinicolo ma anche per tutta la zootecnia italiana, che abbiamo fortemente voluto e che giunge proprio nel momento in cui si va inasprendo la guerra commerciale tra Usa e Cina", ha commentato il presidente di Confagricoltura Massimiliano Giansanti. "E' auspicabile ora", ha osservato il presidente della Federazione degli allevamenti suini di Confagricoltura Claudio Canali, "che venga varato rapidamente il certificato sanitario nazionale che permetterà di effettuare le prime spedizioni per la Cina". L'export delle carni suine fresche e congelate italiane verso la Cina, al momento, ha un valore marginale (circa 105 mila euro nel 2018), realizzando solo lo 0,01% del miliardo di euro delle esportazioni europee complessive, di cui quasi l'80% sono concentrate in quattro Paesi della Ue; ci sarebbe dunque un ampio margine di crescita. "L'accordo italo-cinese sulla carne suina è ancor più importante", ha concluso il presidente Giansanti, "per far avanzare gli altri dossier in discussione tra le parti, a cominciare da quello per l'export della carne bovina".



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NEWS

EU-SINGAPORE AGREEMENT: 36 ITALIAN GIs ARE PROTECTED



Within the framework of the free trade agreement between the EU and Singapore, approved in February by the EU parliament, the Ministry of Agriculture informs that Italy has obtained the registration and protection of 36 Geographical indications by the competent local authorities. These are some of the protected PDO and PGI products: Modena balsamic vinegar, Parma ham, San Daniele ham, asiago, fontina, gorgonzola, grana padano, buffalo mozzarella, red blood oranges of Sicily, South Tyrolean apples, grappa, Chianti, Franciacorta, prosecco and others. The next step is the conclusion of the assessment procedure by Ipos (Intellectual property office of Singapore) for further applications for protection and registration presented by Italian Consortia.

Accordo Ue-Singapore: tutelate 36 Ig italiane

Nell'ambito dell'accordo di libero scambio tra Ue e Singapore, approvato in febbraio dal parlamento Ue, il Mipaaf comunica che l'Italia ha ottenuto la registrazione e la protezione di 36 Indicazioni geografiche da parte delle autorità locali competenti. Questi alcuni dei prodotti Dop/Igp tutelati: aceto balsamico di Modena, prosciutto di Parma, prosciutto di San Daniele, asiago, fontina, gorgonzola, grana padano, mozzarella di bufala campana, arancia rossa di Sicilia, mele dell'Alto Adige, grappa, Chianti, Franciacorta, prosecco e diverse altre. Il prossimo passaggio è la conclusione della procedura di valutazione da parte di Ipos (Intellectual property office of Singapore) per ulteriori domande di protezione e registrazione presentate dai Consorzi italiani.

IN 2019, ITALIAN WINE EXPORTS EXCEEDED 6 BILLION EUROS

Italian wines' trade balance will exceed 6 billion euros in 2019. According to the Vinitaly-Nomisma Wine Monitor Observatory. Which highlights that, during the first semester, growth (+ 3.3%, around 3 billion euros this year) was less strong than in the past. With a significant drop in average prices, especially in the EU area. However, sales to third countries subject to free trade treaties (Japan, Canada, South Korea) are flying high. While the increase in the US is lower than the market average and sparkling wines are conquering China, the only ones growing in the Eastern Country. "The trade balance of wine has the most positive impact compared to all the made in Italy sectors", emphasizes the general director of Veronafiere, Giovanni Mantovani. "A record that must be safeguarded by focusing even more on emerging foreign markets and the growth of the premium segment. For this reason, without prejudice to the unquestionable quality of the product, the downward tensions that we find on several levels are a wake-up call that we will be able to silence only through the growth of business dynamics. The presence of Vinitaly in key countries will also have this goal".

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Osservatorio Vinitaly-Nomisma Wine Monitor: nel 2019, export per l'Italia del vino oltre 6 miliardi di euro
L'Italia del vino italiano pronta a oltrepassare per la prima volta i 6 miliardi di euro di saldo commerciale nel 2019. A riferirlo sono i dati dell'Osservatorio Vinitaly-Nomisma Wine Monitor, che evidenziano un primo semestre di quest'anno in cui la crescita (+3,3%, a circa 3 miliardi di euro) è stata meno vigorosa rispetto al passato, con il prezzo medio che ha registrato un calo significativo, specie nell'area Ue. Volano, tuttavia, le vendite nei Paesi terzi oggetto di trattati di libero scambio (Giappone, Canada, Corea del Sud), mentre l'incremento negli Usa è inferiore rispetto alla media del mercato e in Cina si affacciano gli sparkling, unica tipologia segnalata in crescita all'ombra della grande muraglia. "Il saldo commerciale del vino è quello che presenta la maggior incidenza positiva rispetto a tutti i comparti del made in Italy", sottolinea il direttore generale di Veronafiere, Giovanni Mantovani. "Un record che va salvaguardato puntando ancora di più sui mercati esteri emergenti e sulla crescita della fascia premium. Per questo, fatta salva l'indiscutibile qualità del prodotto, le tensioni al ribasso che riscontriamo su più livelli rappresentano un campanello di allarme che saremo in grado di silenziare solo attraverso la crescita delle dinamiche di business. I presidi ormai stabili di Vinitaly nei Paesi chiave dovranno servire anche a questo".



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Levoni's story begins back in 1911, when Ezechiello Levoni decided to start his own business. A cold-cuts factory, near Milan, where he wanted to put into practice the local pork-butcher tradition. With no compromises on quality. As it is immediately perceived abroad, in London, where in 1913 its Salame ungherese was awarded with the gold metal at the Modern arts&industry exhibition. Its small factory expanded throughout the years and new production sites were opened in the province of Mantua and Parma and in San Daniele, a small town in Friuli Venezia Giulia. Nowadays, Levoni is still a family business, with over 500 employees, in 4 production sites, serving 10 thousand costumers in Italy and in 50 foreign countries. Passion and care are Levoni's number one rules to keep on top.

Raw materials make the difference

Quality is a matter of details. Just like a century ago, what makes Levoni one of the most appreciated brands in the Italian and international charcuterie and delicatessen shops is

the attention to every aspect throughout each production stage. Starting from raw materials. Which are 100% Italian hogs, bred in northern Italy, near Levoni's production sites, in order to control the selection and processing of the meat and to guarantee the animals' well-being when transferred. Moreover, pollution due to transports is reduced. In fact, Levoni's mission is to promote quality and respect and to constantly improve them.

In addition, natural ingredients, a selection of spices and herbs and an exclusive combination of woods used for smoking cold cuts provide Levoni's deli meats a unique and distinctive ta-

Levoni: qualità 100% italiana

La storia, lunga quattro generazioni, dell'azienda. Dove passione e materie prime di alta gamma sono i principali ingredienti dei salumi di loro produzione e del loro successo. Che sembra non fermarsi: nel 2018, infatti, il fatturato è cresciuto del 2%, specialmente grazie ai mercati esteri. Mortadella, salame, coppa, prosciutto crudo San Daniele e di Parma sono tra i prodotti di punta di Levoni.

ste. A great attention to maturing times completes the recipe.

Levoni in numbers

In 2018, Levoni experienced a growth in turnover for the third year in a row: +2%, thanks to its top-of-the-range products (salame, mortadella, etc.). While, as for foreign markets, which account for 30% of Levoni's turnover, the company experienced an 8% growth in 2017-2018. This positive trend was confirmed during the first half of 2019. In fact, their cold cuts are sold mainly in France, Germany and the United States, where the company has a branch and a distributors' network that almost covers the whole Country. Salame, Parma and San Daniele cured ham and mortadella are the most appreciated products. While new premium quality products, thought for each different distribution channel, will be launched.

This is not enough. Levoni will be also present at three exhibitions in the following months: Winter Fancy Food (San Francisco, January, 19th-21st 2020), Cibus (Parma, May, 11th-14th 2020) and Summer Fancy Food (New York, June, 28th-30th 2020).

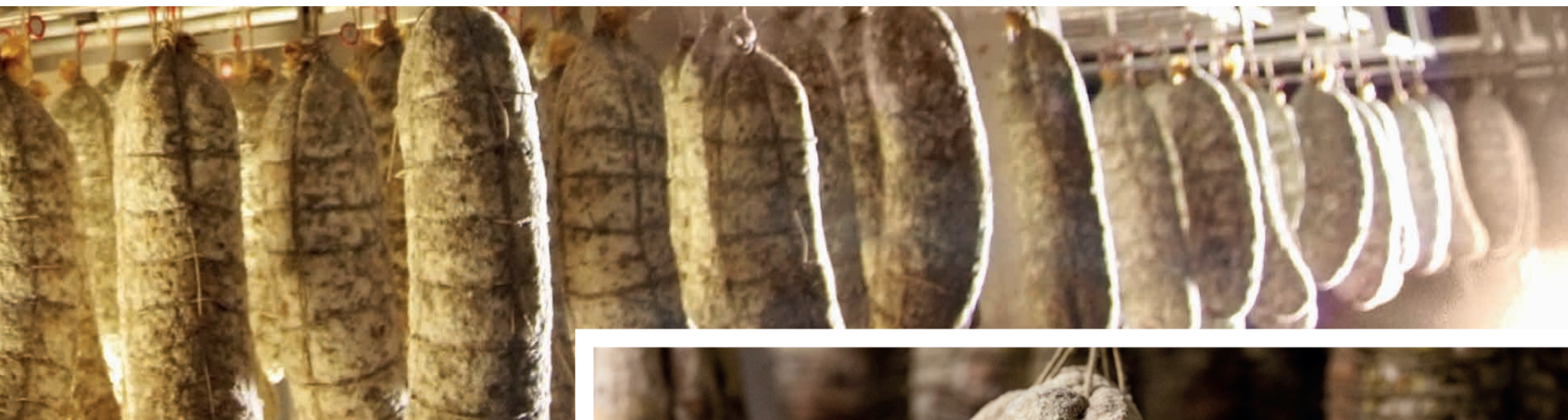
MORTADELLA

The mortadella Oro l'Originale Levoni is characterised by its biscuit-coloured outside, while it is pink, with white and compact small pieces of lard, in the inside. They are distributed homogeneously, just like pistachio nuts. The mortadella's aroma is balanced and characteristic, and leaves no way out but to taste it. Its texture is delicate, and the flavour is intense and persistent. It is a very versatile cold-cut, which can be eaten both cooked or raw, with vegetables, fruits and cheese.



ASSE DEGLI ORIGINALI

The Originali Levoni chopping board. A contemporary evolution of the traditional selection of cold-cuts served on a platter: Agerola salame, Neapolitan capocollo, spiced lardo pancetta, rolled pancetta with pepper, smoked guanciale. The selection is completed by mozzarella and an artichoke and orange salad with crispy bread.



COPPA

The coppa Medaglia d'Oro is characterised by its rounded shape and its light and thick mould. It is hand-bound. When cut, it is red with white veinings, and possibly marbled. It has a sweet and characteristic aroma, with dried fruit scents, due to the ageing period. While, the flavour is balanced between meat and fat. Finally, its texture is compact and homogeneous.



COME VISIT US AT ANUGA
HALL 10.1 - BOOTH G48



AGRIFORM

storie di persone, terre e formaggi



www.agriform.it



ANUGA: THERE'S SOMETHING FOR EVERYONE

THE INTERNATIONAL FOOD AND BEVERAGE EXHIBITION IS BACK IN COLOGNE FROM OCTOBER 5TH TO 9TH. WITH A COMPLETE OFFER OF OVER 7.400 EXHIBITORS FROM ALL OVER THE WORLD AND A NEW SET OF PROPOSALS FOR ALL NEEDS.

This year, Anuga (Cologne, 5th-9th October), the international food and beverage exhibition, will be at its 35th edition. Actually, in 2019, the German exhibition will celebrate its 100th anniversary. In fact, the first edition was held back in 1919 in Stuttgart.

A long path that led to important results, with the last edition in 2017 that gathered over 7.400 exhibitors from 100 countries and more than 165 thousand specialised visitors from all over the world. It is an international point of reference, considering that 90% of the exhibitors and 74% of the professional visitors came from abroad. Once again, the most important Koelnmesse fair proves right to be a global hub for the food industry, besides a source of inspiration, trends and innovation for all the

sectors. The concept '10 trade shows under one roof' reveals the completeness of the offer. Halls in Anuga, in fact, will be divided into themed areas characterised by a well-organised layout: Fine food, Meat, Dairy, Bread&bakery, Organic, Chilled & fresh food, Frozen food, Drinks; Hot beverage, Culinary concept.

That's not all. According to Koelnmesse, the companies' new proposals meet all needs and all sectors: vegetarian and vegan, gluten-free and lactose-free, superfoods and ready-to-eat. There's something for everyone. So that the Organisation has spotted the 2019 trends which reflect the current developments of the field. Functional foods, 'free from', Halal, Kosher, Gmo-free, organic, Denomination of protected

origin, ready-to-eat and superfoods, fair trade.

At Anuga, the present is a talking-point, as well as the future, which is addressed in different ways. The latest innovations are presented at the 'Taste innovation show'. Will the numerous start-ups while present the most recent solutions for the food industry. The exhibition 'Future of food' provides an overview on tomorrow's nutrition, while the special exhibition 'Anuga Horizon 2050', in five different rooms, will focus on the subjects that will concern the industry over the next 50 years.

During the fifth conference on food innovation 'iFood', research and development topics will be followed up. Organised by the Dil, the German institute for food technology,

the international networking event for technologists, producers and food retailers aims at finding ways to develop efficient chains to supply costumers with sustainable and attractive products. Four main topics will be addressed: Sustainability – new concepts for food; Digitalism – blockchain and artificial intelligence; Innovations – increase of knowledge transfers; New foods – trends in the global food system.

What about Italy? Also in 2019, it will be a protagonist during the fair: the number of Italian exhibitors is increasing, also thanks to a higher number of regional and collective bodies participating. In the following pages, a preview of the new products that Italian companies will be presenting.

CHEESE

FATTORIE FIANDINO IN PIEMONTE

Hall: 10.1 • Booth: G 052A

www.fattoriefiandino.it



Gran Kinara

Gran Kinara, produced with 100% milk from Piedmont, is a hard cheese with long maturation that soaks in Sicilian salt brine from 10 to 15 days and then slowly age for more than 12 months. Produced with the kinara method which requires the use of the flowers of the Cynara cardunculus plant that turns into "real vegetable rennet", it is a lactose free cheese without preservatives.

Ingredients

Milk, salt, vegetable rennet (Cynara cardunculus)

Packaging

Weight of the wheel approx. 38 Kg.

Under vacuum: 1/8 of the wheel (4,5 Kg), 1 Kg, 500g, 250g.

Grated 90g, 1 Kg.

LUIGI GUFFANTI 1876

Hall: 10.1 • Booth: B 058

www.guffantiformaggi.com



Al rubiolon di capra a latte crudo

A very new product, born as an evolution of the classic Piedmontese goat's robiolo. The production area is that of the lower Piedmont, where the animals are fed exclusively grazing.

Ingredients

Goat milk

Expiration date and conservation

90 days / 2-4 C°

Packaging

1 wheel 4 kilos

Certifications

Fssc 22000

IGOR

Hall: 10.1 • Booth: H 054

www.igorgorgonzola.com



Gran riserva Leonardi al cucchiaino

Gran Riserva Leonardi is a carefully crafted and selected Premium Gorgonzola. It originates from the passion and enthusiasm of three generations of producers expert in the ancient art of cheese making. It is a sweet Gorgonzola with an exclusive flavour.

Ingredients

Whole cow's milk (98.26%), selected milk enzymes (1.5%), selected Penicillium moulds (0.01%), dehydrated sea salt (0.21%), animal rennet (0.02%)

Expiration date and conservation

59 days

Packaging

Wheel (12 kg), 1/2 wheel (6 kg), 1/8 wheel (1,5 kg) 1/16 wheel (750 g), pack (150/200 g)

Certifications

Iso 5001; Iso 9001; Brc; Ifc

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Prodotto in Italia
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we have created the perfect product for the one
that is careful to the comfort and the taste.

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No added Nitrites

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www.solocosi.com >



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AROMI NATURALI



Cosciotto
A LENTA COTTURA
SOLO COSÌ
Motta Ottavio



Gluten-free, sugar-free, allergen-free.

info@martino.izzi.design.it

solocosi



PRODUCT PREVIEW

AGRIFORM

Hall: 10.1 • Booth: G 048

www.agriform.it

Agriform Grated Grana Padano Pdo

Agriform is a company that has always stood out for its focus on innovation and improvement.

It is precisely looking at the future. Thirty years after the foundation, the company decided to update the image as well as the packaging of its products.

The guidelines that inspired the choices are: simplicity, originality, and uniqueness.

As an example, among the many packagings in its wide product range, Agriform



have chosen to present one of its key packs: Agriform's grated Grana Padano 100g.

Ingredients

Milk, salt, rennet, preservative: lysozyme (from egg)

Expiration date and conservation

Keep refrigerated at +4 / +8°C

Shelf life: from 120 to 60 days

Packaging

Modified atmosphere packaging

Certifications

Brc Global Standard for Food Safety – Grade A

Ifs Food – Higher level

Uni En Iso 9001:2015

BOTALLA

Hall: 10.1 • Booth: G 056

www.botallaformaggi.com



Il Blu Di Grotta

A recipe based entirely on equilibrium. This cheese is made of 100% goat's milk characterized by blue grains resulting in an intense flavour and a persistent aroma. A decisive but a very harmonious taste.

Ingredients

Goat milk, salt, rennet, lactic ferments, Penicillium roqueforti

Expiration date and conservation

65 days from the date of packaging

Packaging

CT X 2

Certifications

Ifs; Iso 9001

CASEIFICIO DEFENDI

Hall: 10.1 • Booth: A 014

www.formaggidefendi.com



Gorgonzola Pdo organic 200g

A Pdo blue-veined cheese made exclusively by organic certified milk according to the ancient tradition. Characterized by a mild and delicate taste that is exalted by its soft consistency.

Ingredients

Organic milk, salt, rennet

Conservation

Storage temperature +2/4°C

Packaging

It is packed in an eco-friendly tray designed with an important reduction of plastic material and to be 100% recyclable. Customizable on its four sides. A packaging that can always guarantee the perfect preservation of the product and minimize its impact on the environment.

Certifications

Brc; Ifs; Organic; Fda; China list registered

COOPERLAT SOC. COOP. AGRICOLA

Hall: 10.1 • Booth: B 049

www.trevalli.cooperlat.it



Burrata Trevalli Bonta' Del Parco

Fresh Burrata with a mix of soft frayed spun paste and cream.

Ingredients

Milk, UHT cream (min. 25%), salt, rennet, lactic ferments

Expiration date and conservation

21 days

Packaging

PP (polypropylene) cup with freshness-saver lid and handle

Certifications

100% Italian milk

BEPPINO OCCELLI

Hall: 10.01 • Stand: G 058

www.occelli.it



Occeci in foglie di Castagno (in Chestnut leaves)

A hard cheese that is left to age for about a year and a half. The wheels are then wrapped in chestnut leaves which transform them and enrich them with a strong, exceptional flavour. It pairs well with great Langa wines but is ideal with important dark craft beer too.

Ingredients

Italian sheep milk, Italian cow milk

Expiration date and conservation

90 days

Packaging

Half, quarter, eight.

140g slices, 80 g slices

SI.FOR.

Hall: 10.1 • Booth: F 059 A

www.formaggisifor.it



Mini Kit Cannoli Siciliani

You can make fresh 100% Sicilian cannoli directly at your home. Sweet ricotta cream, from 100% Sicilian milk, is ready to use. It must be refrigerated at 0- + 4 ° C (not frozen). It has a very good shelf life.

Ingredients list

Sac à poche of sweet ricotta cream ready to use (Sheep's ricotta : Sheep's whey, Sheep's milk, salt- sugar 29%, aroma vanillin, Stabiliser E415), six mini cannoli waffles (Soft wheat flour 00, sugar, palm oil, salt, cocoa, aroma vanillin). One pack of fine sicilian chopped pistachio.

Expiration date and conservation

90 days at 4°C

Packaging

100% recyclable packaging – 9 mini kit/carton

IGOR

Gorgonzola



www.igorgorgonzola.com



COLOGNE, 05-09.10.2019
PADIGLIONE/HALL 10.1
STAND H 054



B2CHEESE
FROM MILK TO MARKET

BERGAMO, 17-18.10.2019
PADIGLIONE/HALL A
STAND 72

PRODUCT PREVIEW

INALPI

Hall: 10.01 • Stand: G 008

www.inalpi.it



Bio line Inalpi

The Bio Line Inalpi is composed by new products, part of an ever-growing organic range, produced with organic milk from selected 100% Piedmontese farms to show the company's focus on quality.

Ingredients

Fresh cream from the centrifuge and 100% Piedmontese milk

Product weight:

Formaggino Bio 140g - Burro Piemontese Bio 125g - Mozzarella Bio Inalpi 400g - Toma Latterie Inalpi Bio 200g - Fontal Nazionale Bio 200g - Formaggio Piemontese Bio grattugiato 90g

Packaging

Formaggino Bio 140g: every single snack is wrapped in aluminum and encased in cardboard
Burro Piemontese Bio 125g: wrapped in parchment paper
Mozzarella Bio Inalpi 400g: thermoformed package
Toma Latterie Inalpi Bio 200g: thermoformed package
Fontal Nazionale Bio 200g: thermoformed package
Formaggio Piemontese Bio grattugiato 90g: in stand-up case

GRUPPO FORMAGGI DEL TRENTO - LINEA TRENTINGRANA

Hall: 10 • Stand: A 080

www.formaggideltrentino.it

Trentingrana

Trentingrana is a typical mountain cheese with the mountain goodness right at its heart. It is made of milk originating from cattle breeding in Trentino and being recognized for its specific peculiarities by means of Presidential Decree (DPR no.3181 dated 26/01/87).

Trentingrana is still processed by traditional methods, whilst modern technologies guarantee the compliance with strictest sanitary standards. Trentingrana originates from milk of cows bred in Trentino region and fed only with hay and Gmo-Free fodder authorized by the Consortium, in accordance with strict production guidelines forbidding not only the use, but even the possession of any silage.

No additives nor preservatives are used for milk processing. Thanks to its distinct organoleptic properties such as the special scent, aroma, and the perfectly equilibrated taste, Trentingrana is an all-round cheese that suits every palate.

Ingredients

Milk, salt and rennet only

Packaging

Whole wheels by approx. 36 kg;

Certifications

Trentingrana is a "Qualità Trentino" branded product.



LATTERIA SOCIALE MANTOVA SOC. AGR. COOP. (LSM GROUP)

Hall 10.1 • Booth A 019

www.lsmgroup.it



Grana Padano grated 100 g bag

The Grana Padano grated range produced by Lsm Group is wide and includes several formats, from smaller bags (100 g to 500 g), to larger (1 kg, 2 kg, 5 kg), specific for retail and catering services.

One of the most successful articles is the fresh grated Grana Padano 100 g, in the Doypack aluminium resealable bag. A captivating and functional packaging, recently renewed, that preserves the flavour and the quality of the product, but also easy to store and ready to use in the kitchen.

Ingredients

Milk, salt, rennet, lysozyme (protein from egg)

Expiration date and conservation

100 g bag: 90 days (storage: +4/+8°C)

Packaging

Doypack aluminium resealable bag

International certifications:

Brs and Ifs; Haccp; Ica; Halal; Kosher

VALGRANA

Hall: 10.1 • Booth: A 048

www.valgrana.it



Piemontino

It is a hard cheese characterized by a cooked paste reaching a slow maturity. It is produced all year long and may be used both for dining and grated. It is produced with 100% Piedmontese milk, without lysozyme and its seasoning is more than 15 months.

Ingredients

Raw cow's milk, salt, rennet

Expiration date

120 days

Packaging

Portioned and packed in vacuum pieces of 300 g

Certifications

Iso 9001; Iso 22000; Iso 22005

SABELLI GROUP

Hall: 10.1 • Booth: B 079

www.grupposabelli.it



Mozzarella 4x100gr

Fresh pasta filata cheese from cow's milk

Ingredients

Milk, salt, rennet, starter cultures

Packaging

4 mozzarellas, individually packaged in a single bag

STERILGARDA ALIMENTI

Hall: 10.1 • Booth: C 009

www.sterilgardaalimenti.it

UHT Ricotta

Typical Italian product, the Ricotta Sterilgarda is an excellent ingredient for tortellini, cheese cakes and other dishes, now in the new Uht version. No preservatives.

Ingredients

Milk, whey, cream, modified starch, stabilizers: pectin, carrageenan; acidity corrector: lactic acid

Expiration date and conservation

8 months

Packaging

500 ml Tetrabrik cartons

Certifications

Ifs Food



TARTUFLANGHE

Hall: 11.2 • Booth: A 44

www.tartuflanghe.com

Organic White Truffle Butter

Excellent organic product with Italian butter and White Truffle. Ideal to flavour bread and crackers, it is also an excellent condiment for warm dishes, for pasta, risotto, eggs or meat fillets.

Shelf life

12 months

Packaging

30 g

International certifications

Brc; Ifs



LEONCINI

Hall: 5.2 • Stand: E 010

www.leoncini.com



Italian turkey breast

100% Italian meat derived from an entire turkey breast, and not from a cluster of different trimmings. Turkeys are born, reared and slaughtered in Italy.

Characteristics

Without polyphosphates - Without monosodium glutamate - Without starches - Gmo-free - Gluten-free

Shelf life

120 days

Packaging details

4 kg approximately. Vacuum packed

International certifications

Brc; Ifs

SALUMIFICIO SAN MICHELE – LE FAMIGLIE DEL GUSTO

Hall: 5.2 • Booth: C 060

www.san-michele.it



Prosciutto crudo Respect

Faithful to tradition, this cured ham is made using only high-quality natural ingredients to ensure the highest nutritional value and food safety. In full respect for the environment and animal welfare, the best meat cuts are selected from pork raised with all-vegetarian feed and absolutely without antibiotics. The ingredients are processed without artificial preservatives or additives and the product transformation processes are totally natural harmless.

Packaging details

Thermoformed tray 90 g

CONSORZIO DEL PROSCIUTTO TOSCANO

Hall 5.2 • Booth D 057

www.prosciuttotoscano.com



Prosciutto Toscano

For the production of Prosciutto Toscano only the meat of heavy Italian pigs with low water content, optimal fat content, and good tastiness is used. Animals are raised in Tuscany and other designated regions in Italy.

Packaging details

You can find the prosciutto with bone, boneless, cuts or sliced (prepacked). A metal seal with the initials P.T. (Prosciutto Toscano) indicating when maturing has begun is attached to each ham.

Ingredients

Meat from heavy Italian pigs, salt, pepper and a mixture of typical natural Tuscan aromas

follow

ONE CHEESE... LEADS TO ANOTHER!



Only milk from Piedmont, flowery taste, coloured pepper, turmeric, ginger, curry for these cheeses which are surprising for their personality and harmony. Welcome De'Floris, Pepè, Curcumella, Zenzerino and Don Curry.

For a chef's delight!

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5 - 9
OCTOBER 2019

**PAD. 10.1
STAND G056**



PRODUCT PREVIEW

LENTI – RUGGER

Hall: 5.2 • Booth: C 064

www.lenti.it



Lenti – Season&Taste

Lenti proposes a great new service to enjoy a selection of Italian delicious recipes. "Condisci&Gusta - Season&Taste" is a collection of Lenti's best cold cuts proposed with special dressings expressly chosen to enhance the taste of each product. Product and dressing are kept separate in the tray, so that the consumer can dose them at will. Perfect for a lunch break out of home, or a second dish easy to prepare and ready for the table. The products and sauces are gluten-free, lactose free, without glutamate and Gmos free.

Weight

Vitel Tonné (Beef round with tuna sauce): 120 g

Cold cut weight: 60 g - Dressing weight: 60 ml

Italian Carpaccio di Bresaola with Italian extravirgin oil with dressing with lemon flavouring and Parmigiano Reggiano: 110 g

Cold cut weight: 100 g - Dressing weight: 10 ml

Packaging

In clear trays in protective atmosphere, tray dimensions (w x l x h): 235 x 210 x 20 mm

Shelf life

Vitel Tonné: 32 days

Italian Carpaccio: 60 days

International certifications

Brc; lfs

ROVAGNATI

Hall: 5.2 • Booth: D 058 – E 059

www.rovagnati.it



Gran Biscotto with truffles

Prosciutto Cotto Italiano (Italian cooked ham) made from the selection of the best pork thighs exclusively worked by hand. Enriched with black truffles visible in each slice, which give that extra touch of flavour enhanced even more thanks to the slow steam cooking. A real delicacy, which represents a perfect balance between delicate and intense flavor.

Shelf life

180 days

Packaging details

Avg weight 5kg; 2 half pieces/carton; Foil-lined vacuum pack; Carton

International certifications

Brc; lfs

DEVODIER PROSCIUTTI

Hall: 5.2 • Booth: B 41

www.devodier.com/en



Bio - Organic Italian Prosciutto Crudo

The product is born from a collaboration with the best Italian farmers. Organic farming respects the welfare of animals, guaranteeing them freedom of movement both in comfortable shelters and in external areas, with the added security of a controlled diet and the certification of an external body throughout the supply chain. On top, the final product has the set of our usual guarantees: only Italian meat and salt, natural seasoning and the uniqueness of taste able to create strong customer loyalty.

Shelf life

90 days

Packaging details

70g; Map tray laid by hand

International certifications

Bio; Organic; Brc; lfs

SALUMIFICIO MARCHISIO

Hall: 11.2 • Booth: B 51A

www.salumificiomarchisio.com



Salame Marchisio con Zenzero

Salumificio Marchisio presents this new match: our classic recipe for the best Marchisio salami with the addition of soft pieces of ginger and a pinch of ginger powder. This is how you can enjoy this unique salami with a fresh taste that will conquer ginger lovers and will amaze your palate during tasting. To always follow tradition, the company prepare this salami with carefully selected pork meat, seasoned with a balanced mix of herbs and spices and the addition of ginger pieces in the meat mixture. Salami age in special cellars, with a constant air flow. Here, the salami will develop characteristic tastes and fragrances that you will find in the final product.

Shelf life

You can keep salami at room temperature or in the refrigerator, better if hanged. If correctly stored, you can keep Marchisio salami with Champagne for several months.

Packaging details

Available in turista size of about 300 g

Coloured label with product description, ingredients and nutritional values

LE FAMIGLIE DEL GUSTO - SALUMIFICIO F.LLI COATI

Hall: 5.2 • Booth: C 060

www.salumificiocoati.com

www.lefamigliedelgusto.com



Lenta cottura – High Quality Cooked Ham

High quality cooked ham - steamed slowly and at low temperatures, which lasts more than 22 hours, with reduced salt content and thighs coming only from animal welfare farms. Its natural flavor is preserved without dispersing the noble meat proteins and the organoleptic, nutritional properties. Quality Award price 2020.

Produced by a whole selected thigh, it contains a reduced salt rate, with 25% less than a product of the same category. Iodine enriched product. Only natural flavors.

Shelf life

120 days

Packaging details

About 9,5/10 Kg

Vacuum packed aluminum bag

International certifications

Pork leg from 'Animal Welfare' farms

FELSINEO – LE FAMIGLIE DEL GUSTO

Hall 5.2 • Booth C 060

www.felsineo.com



1963 mortadella 100% Artigianale

High in proteins, low in fat compared with traditional mortadellas. Slow cooking, high-quality ingredients and selected pork cuts confer a new texture and a delicate taste, ensuring its truly unmistakable flavour.

Ingredients

Pork, salt, pistachios (0,5%) – in recipes where foreseen, pepper, garlic, antioxidant: sodium ascorbate, preservative: sodium nitrite.

Weight/sizes

Casing in different weights, 100 g takeaway tray

Characteristics:

Source of proteins, -28% of fat (Respect to the average of mortadellas -nut.entecra.it), selected cuts of italian meat

CONSORZIO DI TUTELA DELLA FINOCCHIONA IGP

Hall: 5.2 • Booth: D 068

www.finocchionaigp.it



Finocchiona Pgi (Protected Geographical Indication)

Typical Tuscan cured meat certified with the recognition of the Protected geographical indication. Made with selected top quality meats flavored with traditional Tuscan ingredients, including fennel seeds and flowers that give the typical taste to Finocchiona Pgi.

Shelf life

About 1y full size; about 6m vacuum packed; 1m sliced in packs

Packaging details

From 0,5 kg to 25 kg full size
Various types of vacuum packaging
Various types of sliced product in packs

F.LLI GALLONI

Hall:5.2 • Booth: A 040

www.galloniprosciutto.it



Gargantuà

This particular dry cured ham is salted by hand using a mix of sea salt, aromas and natural spices that we prepare ourselves. Made with selected Italian meat, it's created for those who want something more than standard tastes and are looking for a dry-cured ham with intense aroma and marked flavour. The greater consistency of the lean part also makes it suitable for hand slicing with a knife.

Shelf life

12 months for deboned product

Packaging details

The product is available bone-in, deboned and sliced

International certifications

Brc; Ifs; Iso 9001:2000; Sa8000; Iso 22005:2008; Iso 22000:2007

LA FELINESE SALUMI

Hall: 5.2 • Booth: A 040B

www.felinese.it



I Tesori Italiani

The renowned expertise and the passion for quality are the core elements of this range, created to celebrate the tradition of authentic Italian deli meats. Pigs born and raised in Italy, a production method that follows the tradition, softly laid-out slices, a complete range of high-end products: these are the premium features of this assortment, designed to combine modernity and traditional craftsmanship.

Shelf life

90 days for cured products, 40 days for mortadella, 35 days for cooked ham

Packaging details

80 g -110 g, protective atmosphere

International certifications

Brc; Ifs

follow



WITH

PORK MEAT
SALT | PEPPER
ROSEMARY
GARLIC



www.porchettaigp.eu



WITHOUT

ANTIBIOTICS
NITRITES | NITRATES
COLOURANT | GLUTEN
LACTOSE



ANTIBIOTIC FREE LIFE
GUARANTEE

ANIMAL WELFARE

Larger spaces, increasing the minimum breastfeeding period.
Real respect for the environment

The chain guarantee a **COMPLETE TRACEABILITY** thanks to the latest generation chip used to monitor every phase of animal life.

PRODUCT PREVIEW

SALUMIFICIO SORRENTINO

Hall 5.2 • Booth D 070

www.salumisorrentino.com



Sorrentine truffle line

The Sorrentine Truffle Line is made with real flakes of Black Summer Truffle (*Tuber aestivum*). It includes four excellent products, completely gluten-free, dedicated to the most refined palates, foodies and gourmets around the world: it includes the delicate and sweet Salametto, awarded with the 'Gold Award' Merano Wine Festival 2016, the Truffle Spianata stuffed into natural casings and only selected lean meats; the Cooked line includes Cotto ham and Mortadella (both without polyphosphates and milk derivatives, without glutamate, Gmo-free).

Ingredients

Products with at least 3% truffle Black summer truffle (*Tuber aestivum*)

Average weight / sizes

From 200 g to 6 kg

Packing

Natural or vacuum packed

Expiration times

From 6 to 9 months

Certification

Brc; lfs

TERRE DUCALI – PROSCIUTTIFICIO SAN MICHELE

Hall: 5.2 • Booth: D 065

www.terreducali.it

Aperitif with Fiocco

The product contains charcuterie, cheese, olives, and bread sticks. 100% Italian specialties: Fiocco, cheese, olives and breadsticks to be tasted as a meal or as an appetizer. The product comes in an elegant black tray to be served directly at the table.

Ingredients

Seasoned flake 33.35%; 26.65% seasoned cheese; 26.65% mixed olives; baked breadsticks 13.35%

Shelf life

40 days

Packaging details

Average weight of the product 150 g

Packaged in preformed tray in protective atmosphere

Storage condition

Store at a temperature of max +4°C



LEVONI

Hall: 5.2 • Booth: D 50-E 51

www.levoni.it



Mortadella

100% Italian Origin: All Levoni-branded recipes originate from the best animals born, bred and processed in Italy, from prime meats thoroughly selected and processed. In every slice, there's Levoni's attention to aromas, flavours and authentic recipes, a story of the great Italian delicatessen tradition.

Characteristics

- Recipe of the homemade tradition
- Supply chain certified by Csq
- 100% Italian origin
- Animal welfare
- Only natural spices and flavours
- Attention to intolerances and allergies: gluten and lactose free, with no milk proteins and added glutamate

Shelf life

40 days from packing date on adhesive label

Packaging details

100g - Gma package

International certifications:

Supply chain certified by Csq: Uni En Iso 22.005 - Cert n° 41445 dtp 130 - Cert n° 53617 Dtp 109 - Cert n° 53618

SALUMIFICIO SOSIO

Hall 5.2 • Booth E 040

www.labresaoladebaita.it

Organic Bresaola

The organic bresaola is produced with selected beef meat, coming from the best farming and certified through all the chain. The product undergoes strict and constant processing controls, which guarantee the quality for the consumer's protection. It is also available in bars, suitable for slicing.

Characteristics

- Gluten free
- Lactose free
- Gmo free
- High in proteins and low in fats

Packaging

Average weight

• Whole piece 2,1 – 4,0 kg

• Half piece 1,6 – 2,2 kg

Vacuum-packed with polymer-based casings and external package

2-4 pieces per carton; 7-14 pieces per carton

Shelf life

90 days from packing date

Certifications

Icea; It 1436/L Ce



ADR

Hall: 11.2 • Booth: G009

www.sassellese.it

Classic and cocoa canestrellini

The mix pack with one of our top products has just born: the Canestrellino.

Cocoa has been added to the classic product, made of shortbread and realised with only selected ingredients and without preservatives. This operation has been realized by ADR for a continuous improvement. With this change LaSassellese brand remains a guarantee of quality. In addition to the standard packaging, suitable for a sweet break, an elegant and fancy gift box is available.

Ingredients

Wheat flour, vegetable margarine (palm oil, coconut oil; water; emulsifier: mono and diglyceride of fatty acids; acidity balancer: citric acid; flavourings), sugar, egg yolks, cocoa (classic 0.5% - cocoa 2%), without hydrogenated fats.

Packaging details

Schell

4.93 Oz

140 g

Shelf life

11 months

International certifications

ADR is certified Iso 9001; Standard lfs and Brc; ambientale Iso 14001; Rspo Roundtable on sustainable palm oil for levels Mass Balance and Segregation.



ALCE NERO FREDDO

Padiglione: 5.1 • Stand: F 72 / F 90

www.alcenero.com

Alce Nero Organic Frozen pizza, Margherita and Grilled Vegetables

Alce Nero Pizza, available in two varieties, Margherita and grilled vegetables, is prepared with Italian organic ingredients. It is made with flour type 1 from selected Italian grains to obtain an ideal blend for a crispy, crumbly and fragrant dough. The tomato puree is Alce Nero's as well as the extra virgin olive oil, cold pressed, which comes from its 160 olive growers. The Mozzarella cheese is made using Italian organic "Hay TSG milk" from cows fed almost entirely with fresh or dried grass (hay). The dough is naturally leavened for 24 hours. The pizza base is wood-fired cooked on a lava stone then topped manually with the diced tomatoes, mozzarella cheese and grilled vegetables. The pizza is finally frozen through blast chilling to preserve the high quality and its organoleptic features.

Ingredients

Soft wheat flour type 1, water, tomato puree, mozzarella cheese from "Hay Stg milk", dough, extra virgin olive oil, salt, sunflower oil, basil. For the grilled vegetables: as above plus courgettes, aubergines and black cabbage.

Packaging details

Margherita: 363g

Grilled vegetables: 408g

Shelf life

18 months



INSPIRED BY NATURE



imagine

ECO FRIENDLY PACKAGING

Fumagalli industry has always been committed in a project to develop a sustainable packaging and has realized a new **Eco-Friendly product line**, with more than **75% paper** and a **completely recyclable*** tray. The products are prepared with pork meat from pigs born and bred in Fumagalli owned facilities, in accordance with our **Animal Welfare** policy.



*recyclability certified in Italy by ATIGELCA 5012017
**the wood used to manufacture the product comes from forests that are managed in compliance with strict environmental standard



-  **WITH MORE THAN 75% FSC SUSTAINABLE PAPER**
-  **COMPLETELY RECYCLABLE TRAY**
-  **FSC** SUSTAINABLE PAPER**
-  **ANIMAL WELFARE**



TASTE THE FUTURE
COLOGNE, 05.-09.10.2019



Come and discover our products
HALL 05.2 - STAND A061

PRODUCT PREVIEW

CEREALITALIA I.D.

Hall: 10.2 • Booth: D 080A

www.cerealitalia.it

Nature Snack – Lenticchie

Extruded snacks made with pulse and rice flour. No fried, no oil and source of protein.

Ingredients

Lentil flour from “Lenticchia di Altamura Igp” (Lentil of Altamura pgi), rice flour, tomato and basil.

Packaging details

70 g - bag

Shelf life

9 months



DI COSTA

Hall: 2.2 • Booth: B 018

www.dicosta.it

Panettone with orange cream Pgi

Panettone. Baked product, natural leavening.

Ingredients

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

Packaging details

750 g

Shelf life

9 months

International certifications

Ifs

Brc



IL FORNAIO DEL CASALE

Hall: 3.2 • Booth: A 069

www.gecchele.com



Crumble del casale Gecchele

Cocoa Crumble with cranberry and infusion of Goji berries.

Ingredients

Wheat flour, cranberry filling and infusion of goji berries, sugar.

Packaging details

300 g

Shelf life

150 giorni

International certifications

Ifs Higher level

DECO INDUSTRIE

Hall: 11.2 • Booth: E 051G

www.piadinaloriana.it

www.decoindustrie.it

Loriana Piadapizza

A unique recipe with typical ingredients: the true Neapolitan pizza made with durum wheat flour meets the authentic Piadina, giving rise to an incredible taste and unique consistency. Thanks to its particular blend, it's an ideal piadina to use as the base for an excellent piadina pizza. The traditional piadina combined with your ideal pizza, creates the perfect balance: the Piadapizza. Fill it and taste it with your favorite topping.

Ingredients

- Wheat flour
- Water
- Extra virgin olive oil
- Sunflower oil
- Durum wheat flour
- Salt
- Brewer's yeast
- Raising agents

Packaging details

Each package contains 3 Piadapizza (375 g)

Packaged in a protective atmosphere

Shelf life

240 days

International certifications

Brc; Ifs; Fsma; Iso 9001; Iso 14001; Ccpb (Organic); Gluten Free Certificated by Aic



DI LEO PIETRO

Hall: 3.2 • Booth: A 031

www.dileo.it



Fattincasa with fresh milk

Fattincasa are exclusively designed for the foreign market. They preserve all the goodness of Made in Italy: expert craftsmanship handed down from generation to generation and simple, genuine ingredients, such as fresh Italian milk. The pack features a typical Italian village in the background, with a clear reference to the city of Matera and the claim “Made in Italy”. The entire line, having Savoirdi as its main product, is structured around five items: wholemeal; with chocolate chips; with fresh milk; with chocolate chips, cocoa and cream; vegan with chocolate chips.

Ingredients

Wheat flour type 1, sugar, corn oil, pasteurized fresh eggs, top-quality fresh skimmed milk 4%, raising agents: ammonium bicarbonate, sodium bicarbonate; emulsifier: soy lecithin; natural flavourings.

Packaging details

170 g

Shelf life

365 days

DELIZIE BAKERY

Hall: 11.2 • Booth: B 053A

www.barbero.com



GRISSINI RUSTICI - Original - With Sesame, Flax and Poppy seeds

The inimitable Grissini Rustici with an irregular shape and with Extra Virgin Olive Oil with Sea Salt or in the variant with Sesame, Flax and Poppy seeds. The product is a pleasant alternative to bread, on every occasion.

Ingredients

Wheat flour, extra virgin olive oil 11%, yeast, salt.

Packaging details

Box 125g

Box Expo – 12 pieces

Pallet 112 Box Expo

Shelf life

8 months

International certifications

Ifs Food

Brc - Global Standard For Food Safety

LA PIZZA +1

Hall: 11.3 • Booth: C 018

www.lapizzapiuuno.it



Focaccia Genovese Croccante Il Borgo

The authentic Focaccia Genovese Croccante is tasty and crispy. It is handmade in our artisan bakery, only with natural ingredients and strictly without preservatives. An ancient and authentic recipe that faithfully keeps the Ligurian tradition. Available in three recipes: classic, rosemary and tomato.

Ingredients

Wheat flour, extra virgin olive oil, brewer's yeast

Packaging details

100 g

Protective tray to ensure the integrity of a delicate product. All the packing materials are 100% recyclable

Shelf life

120 days

International certifications

Brc; Ifs

HDI - SORINI

Hall: 11.2 - Booth: B 037 B - B 039 A

www.sorini.it



Salty crunchy caramel - Nutty crunchy caramel

Salty: milk chocolate filled with salted caramel and crunchy caramel

Nutty: milk chocolate filled with hazelnut cream and crunchy caramel

Shelf life

18 months

Packaging details

200 g

Net Wt. 7.05 oz / Bag

International certifications

On all products: Brc food; Ifs food

Under request: Utz; Fairtrade; Rspo (license n° 9-1864-16-100-00); Kosher

ICAM CIOCCOLATO

Hall: 11.2 • Booth: E 031

www.icamcioccolato.it
www.vaninicioccolato.com



Biscuit Grain with Amaretto Flavor - Vanini Bagua Peru Chocolate Bar

Among the new references, a simple recipe that makes made in Italy its strong point. This crunchy chocolate bar keeps our tradition: an exclusive fragrance, a unique product with a soft and balanced taste.

Ingredients

Chocolate 62%, amaretto-flavored biscuit

Packaging weight

100 g

Shelf life

24 months

International certifications

Gluten free; Bean to bar; Sustainable Trade

LAGO GROUP SPA

Hall: 3.2 • Booth: A 063

www.lagogroup.it



Party Wafer Duo

Italian wafer bites with double-layer cream filling. In each bite two different combinations of cream are available: chocolate and milk or strawberry and vanilla.

Ingredients

Wheat flour, coconut oil, sugar, glucose syrup, whey powder (milk), fat-reduced cocoa powder (11% in the cocoa cream), emulsifier: soy lecithins, skimmed milk powder, (0.5% in the milk cream), salt, raising agent: sodium hydrogen carbonate, natural flavourings

Packaging details

220 g bag

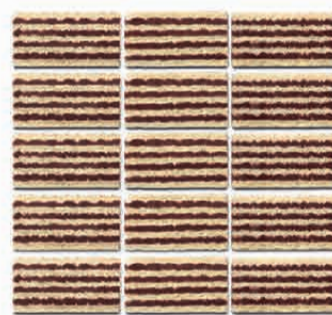
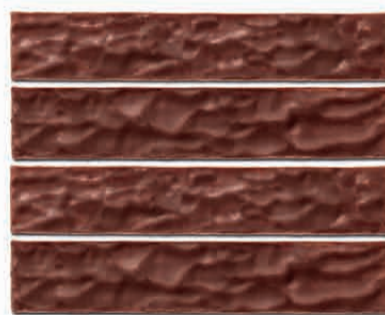
Shelf life

18 months

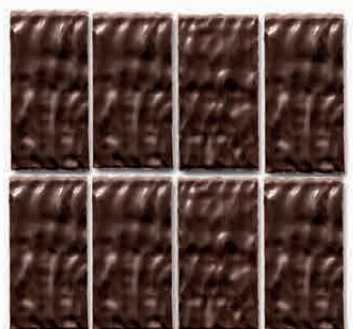
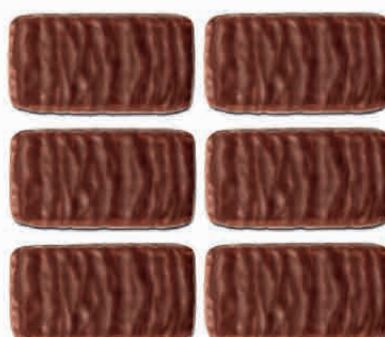
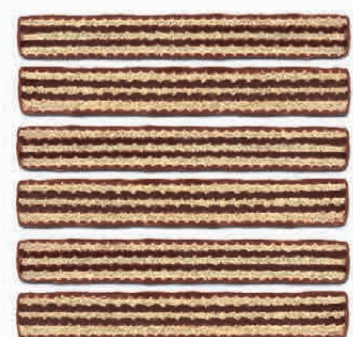
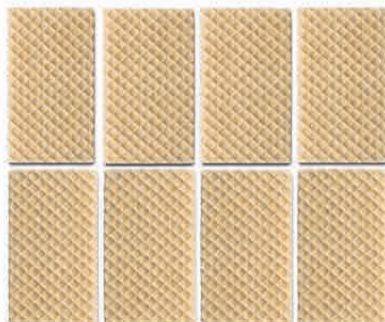
International certifications

Ifs; Halal; Kosher

follow



**WAFERS?
EVERYBODY
HAS THEIR
FAVOURITES.**



LAGO OWNS THEM ALL.



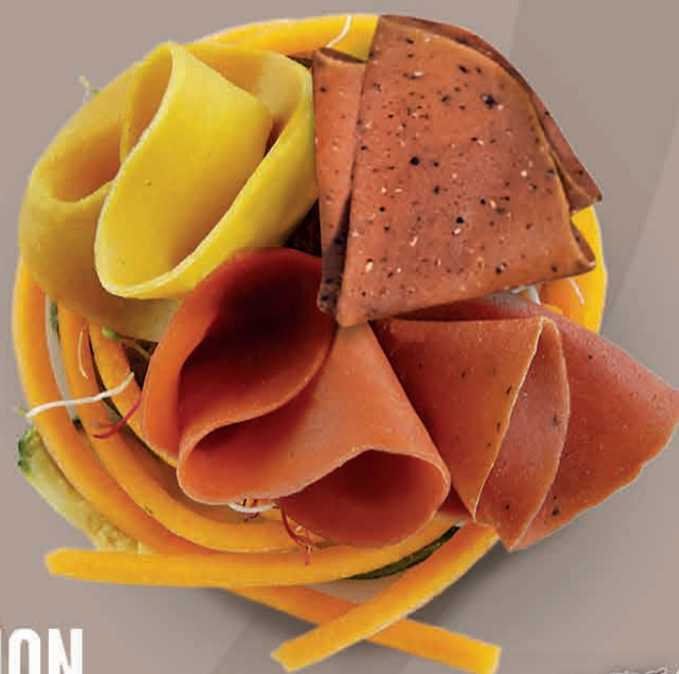
TASTE THE NEW PARTY DUO. THE NEW AND UNIQUE WAFER BITE WITH TWO DIFFERENT FILLING CREAMS.

www.lagogroup.it





LE FAMIGLIE DEL GUSTO



TRADITION. PASSION. INNOVATION.

Le Famiglie del Gusto is a business network based on **the collaboration of three Italian family companies**, specialized in the production of Italian cured meat for over 50 years. The overall competitive advantage is enhanced with organic plant-based products.

The companies are all totally committed to offering **exceptional high-quality products and share common values**, including pride in their work, passion for their products and strong Italian traditions passed down through generations.



45.000

TONS
Annual
Production

9

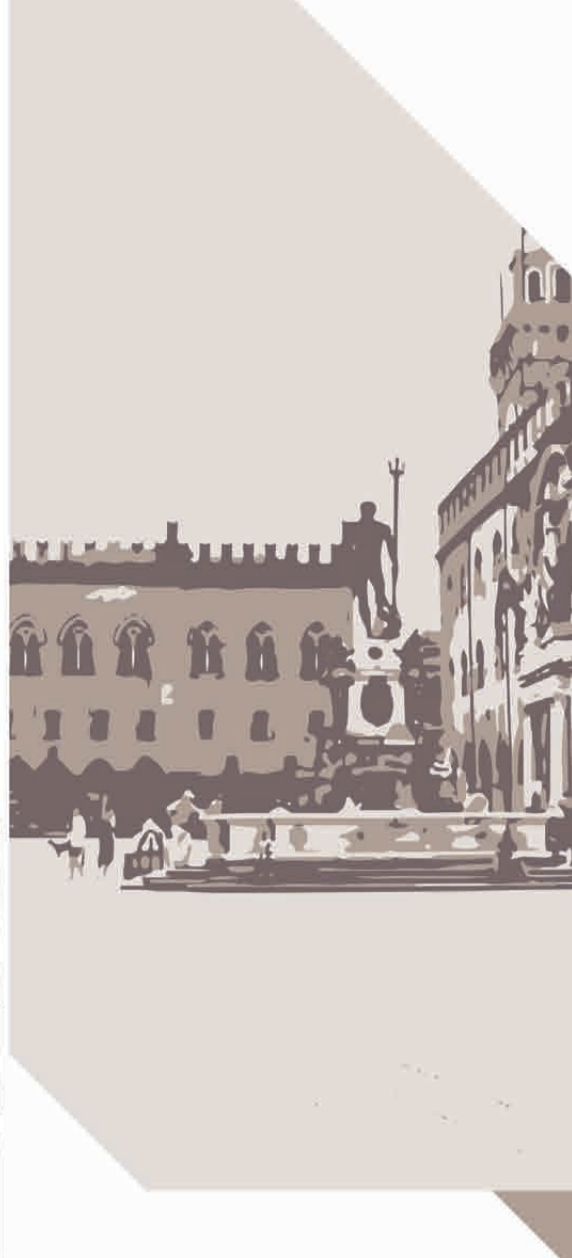
Production
Facilities

300

Total
Employees

170

MIO EUROS
Total
Turnover



A STORY OF
PASSION

A STORY OF
TRADITION

A STORY OF
QUALITY

A STORY OF
INNOVATION

VISIT US AT ANUGA
05-09 October 2019 - Cologne
HALL 5.2 - STAND C060



05-09 OCT 2019
COLOGNE

PRODUCT PREVIEW

LAICA

Hall: 11.2 • Booth: B 59A

www.laica.eu



Extra dark chocolate 72% bars

The Laica 72% Extra dark chocolate bars are created to seek a more intense and unforgettable taste, thanks to a recipe with only natural aromas, without colourings and preservatives. In addition to the version with only 72% extra dark chocolate, designed to satisfy the most demanding consumers and connoisseurs of real chocolate, other variations are available: with soft pistachio cream filling, with orange and cinnamon filling and the novelty of 2019 with lime cream and ginger filling.

Ingredients

Extra dark chocolate 72%; orange/cinnamon flavour cream; pistachio cream; lime/ginger flavour cream

Packaging details

Flowpack 100 g

Shelf life

18 months

International certifications

Brc; Ifs; Iso 22000; Utz; Rspo; Kosher; Sedex; Fairtrade

MOLINO ROSSETTO

Hall: 05.1 • Booth: C 028

www.molinosrossetto.com



Organic Oatmeal

Organic Oatmeal is the latest product by Molino Rossetto. It is part of the line of products packed in briks which are made of Fsc paper with a cap closure, and therefore easy to pour, resealable and resistant, but also recyclable. Thanks to the presence of oats, which guarantees an excellent nutritional supply, it is ideal for breakfast, but it is also excellent in salads or in other recipes. Organic puffed spelt with honey, Organic puffed cappelli wheat with honey and Organic puffed barley with chocolate complete the organic line packed in briks.

Ingredients

Organic Oatmeal

Packaging details

400 g

Shelf life

13 months

OFY MILANO

Hall: 11.3 • Booth: E 021

www.pozzibiscottidautore.com



Biscuits with dark chocolate chips

A delicious biscuit with the intense flavour of dark chocolate and cocoa.

Ingredients

Wheat flour, chocolate chips 20%, powdered cocoa

Packaging details

130g/ paper+polypropylene metallized bag

Shelf life

15 months

International certifications

Iso 9001

PASTIFICIO DI BARI TARALL'ORO

Hall:11.1 • Booth: F 026

www.taralloro.it



Baked Products in Brown Box

The Baked Products in Brown Box line stands out for its havana brown box with the aim of conveying the idea of naturalness, rusticity and simplicity, typical characteristics of the product. Tarallini are smaller (2,5 cm) packed in 250 g bags. The Nodini, Tocchetti and Rustichelle shapes give an original touch to this traditional line.

Ingredients

Tender wheat flour, high-oleic sunflower oil, salt, extra virgin olive oil, rosemary/ lemon/pepper/ olives/ cheese/ onion/ chili pepper/ tomatoes

Packaging details

250 g havana brown box

Shelf life

10 months

Expiry date

12 months

International certifications

It- Bio-007 Agricoltura Italia; Brc; Ifs; Iso 14001; Scs; Sedex Member

PUGLIA SAPORI

Hall: 11.2 • Booth: C 056A

www.pugliasapori.com



Cacio & Pepe Tarallini

The new Cacio & Pepe Tarallini are part of our Gourmet Line, which consists of tarallini produced to meet the needs of consumers who are constantly looking for snacks with unusual and peculiar flavours. The Cacio & Pepe Tarallini are formulated with a blend of ingredients inspired by the Italian dish which gives its name to these snacks: thanks to their unique flavor, they are perfect to accompany happy hours and aperitifs.

Ingredients

Tender wheat flour, white wine, olive oil, cheese and pepper mixture, salt

Packaging details

200 g paper-touch bag

Shelf life

12 months

International certifications

Brc; Ifs; Fssc 22000; Bioagricert Certification For Organic Products

SARCHIO

Hall: 5 • Booth: F 051

www.sarchio.com



Muesli active

Muesli active is an organic and gluten-free muesli, which thanks to the natural presence of oat beta-glucans helps to reduce cholesterol starting from breakfast. Tasty and crunchy for the presence of whole almonds, hazelnuts and pieces of dried apple combined with whole oat flakes, Muesli Active is also rich in fiber, phosphorus, magnesium, copper and manganese.

Ingredients

Whole oat flakes, buckwheat flakes, almonds, toasted hazelnuts, dried apple, crispy rice

Packaging details

250 g

Shelf life

12 months

International certifications

Organic

TERRE DI PUGLIA

Hall: 11.2 • Booth: E 017

www.terredipuglia.it



Taralli gourmet box with fennel seeds

Terre di Puglia presents the new line of Taralli Gourmet Box, Taralli with Fennel Seeds with extra virgin olive oil in an elegant box with window to show the product inside, the iconic Apulian snack which is an excellence of the Italian culinary tradition.

Packaging details

150 g

Shelf life

12 months

I MASINI

Hall: 11.3 • Booth: D 022

www.tipicodisardegna.com



Savoiazone for tiramisù 230gr

The Savoiazone di Sardegna is now available in a new format, the 230 g pack. Born from tradition and innovation, a new recipe designed for tiramisù, with 30% less of fats, 100% Italian ingredients and made only with fresh eggs.

Ingredients

50% of fresh free-range eggs, sugar and wheat flour

Packaging details

230 g pack

Shelf life

5 months

International certifications

Ifs - International Food Standard

TONITTO 1939

Hall: 4.1 • Booth: B071

www.tonitto.com



Lo Stecco

The new Stecco Sorbetto Tonitto is easy to eat. Thanks to 80 years R&D experience, Tonitto has managed to bring all the tastefulness of Sorbetto Tonitto also to the new format. Only essential and natural ingredients, selected among the best raw materials, with no added flavourings or colourings.

Shelf life

3 years

Packaging details

60g x 3 pcs

International certifications

Brc; Ifs; Utz

follow

The spicy you were looking for



COME TO VISIT US

COLOGNE, 05.-09.10.2019

HALL 5.2 STAND E44

SanVincenzo

VERO SALUME DI CALABRIA

PRODUCT PREVIEW

VALLEDORO

Hall: 2.2 • Booth: D 059

www.valledorospa.it



Botton D'oro 200 g

Tasty savory gluten-free biscuits with chickpeas flour, crumbly and tasty with a typical chickpeas flavor. A tasty snack, source of fibers and proteins. Resealable 200g packaging.

Ingredients

Chickpeas flour 60%, cornstarch, sunflower oil, salt, sugar, emulsifier: sunflower lecithin, rising agents (disodium dihydrogen pyrophosphate, sodium hydrogen carbonate) potato starch

Packaging details

200 g/21 units x ct

Shelf life

12 months

International certifications

Ifs; Brc

TEDESCO

Hall: 2.2 • Booth: C 052

www.tedesco group.it



Ore Liete Mini Pandoro frosted with chocolate and chopped pistachio

Traditional Pandoro covered with excellent chocolate and chopped pistachio.

Ingredients

Wheat flour, dark chocolate, eggs, sugar, butter, natural yeast, chopped pistachio nuts

Packaging details

100 g box

International certifications

Brc; Ifc

ALCE NERO

Hall: 5.1 • Booth: F 72 - F 90

www.alcenero.com



Whole wheat penne with lentils

Alce Nero whole wheat penne with lentils are made with whole durum wheat and 100% Italian legumes, mixed with spring water from the Dolomites. They are a tasty alternative to traditional pasta due to a higher protein content and lower carbohydrates. They are a source of fibres thanks to the whole durum wheat, and a source of proteins as they contain 40% of red lentils, the oldest legume ever cultivated. Alce Nero whole wheat penne with lentils (which give them the distinct auburn colour) are excellent with all seasonings and maintain perfect cooking properties.

Ingredients

Organic whole durum wheat (60%), organic red lentil flour (40%)

Packaging details

500 g

Shelf life

36 months

VICENZI

Hall: 2.2 • Booth: B 040-048

www.matildevicenzi.com



Puff pastry sticks with Cinnamon

With their crispness and delicate flavour, the Millefoglie d'Italia puff pastries are the symbol of Vicenzi's fine Italian pastry tradition. Raw materials are carefully selected with great attention to the tradition. The dough's main ingredients are flour, water and butter. The traditional recipe requires that the dough is gently folded back on itself many times obtaining a delicious and fragrant pastry composed of 192 layers.

Ingredients

Wheat flour, sugar, butter, vegetable margarine, salt, Ceylon Cinnamon, flavourings

Packaging details

9g/1pz

International certifications

Brc; Ifs; Kosher; Halal; Iso 9001

ZAGHIS

Hall: 2.2 • Booth: B 058

www.zaghis.eu



Tiramisu 70 g

Made with the original Treviso recipe, lady finger biscuits, mascarpone cream, coffee and cocoa; this product has the characteristic of having a long shelf life.

Ingredients

Cream 46%, coffee 30.6%, ladyfingers 22%, cocoa 1.4%

Packaging details

Weight 70 g

The product is placed into a polypropylene bowl close with a polypropylene film. This bowl is put in a carton paper box.

Shelf life

6 months

International certifications

Ifs

AVESANI

Hall: 7.1 • Booth: A 020 - B 021

www.avesani.com



Chicory and Taleggio Pdo Tortelli – vegetarian Delicacies

Fresh pasta with chicory and taleggio Pdo filling.

Ingredients

Pasta ingredients (45%): wheat flour, durum wheat flour, eggs 22%. Filling (55%): red chicory 28% (red chicory, onion, sunflower seeds oil, carrot fibre), ricotta, taleggio Pdo cheese 14,7% (milk, salt, rennet), bread crumbs (wheat flour, brewer's yeast, salt), mozzarella cheese (milk, lactic ferments, salt, rennet), whole milk powder, potato flour, herbs, salt, yeast extract (yeast extract, salt), onion, spices, flavourings

Average weight

250 g

Shelf-life

Minimum duration: 45 days from shipping. Maximum days: 65 days from production. Validated days: 120.

SCEGLI IL **Re**

Re della Selva . Pork Roast made of the meat of naturally open air bred Italian pigs

Slow growing Italian white pigs, with integrated natural feeding based on barley oat and acorns

Handmade product seasoned only with salt, pepper, wine and fennel

Certified product by 3A PTA Parco

*Antibiotic Free
Respect of the animal welfare
No preservatives*



PRODUCT PREVIEW

MOLINO PEILA

Hall: 11.2 • Booth: A 050

www.molinopeila.it



Preparato per pizza

Gluten-free ready mix, ideal for making pizza and focaccia.

Shelf life

12 months

Packaging details

Cellophane bag 500 g with cardboard

International certifications

Gluten-free, Gmo-free, Brc, Ifs, Iso, Veganok, Kosher

RISERIA VIGNOLA GIOVANNI

Hall: 2.1 • Booth: C 030

www.risovignola.it



Riso Vignola Biologico (organic)

Organic Carnaroli rice grown in Italy with a mulching seeding system.

Shelf life

24 months

Packaging details

Paper Zip Lock Pack – 26.5 Oz (750g)

International certifications

Organic; Usda Organic; Biosuisse Organic; Ibd; Demeter; Fairtrade; Kosher; Ifs; Brc; Stp Gluten Free; Igp Riz De Camargue

DALLA COSTA ALIMENTARE

Hall: 10.2 • Booth: D 080

www.dallacostalimentare.com



Organic Baby Food

To support kids' growth, Dalla Costa proposes this new line of organic durum wheat semolina pasta, enriched with selected organic raw materials. It also contains vitamin B1, which is important for kids' balanced growth. Dalla Costa's Organic Baby Food pasta is small and funny thanks to its shapes: bears, space, missiles (over one year of age), stars and ditalini (over 10 months), rich in flavor and colors because of the presence of organic ingredients such as dehydrated tomato and dehydrated spinach. Dalla Costa's Organic Baby Food line is the result of accurate research and care for young consumers. In this regard, the company has obtained the ministerial authorization for the production of Baby Food organic pasta, according to the directive 2006/125 / CE on cereal-based foods and other foods for infants and young children.

Ingredients

Organic durum wheat semolina, dehydrated organic tomato 0.8% (in red pasta 3%), organic dehydrated spinach 0.4% (in green pasta 1.5%), vitamin B

Average weight

200 g

Characteristics

Bronze die and drying process at low temperature

Packaging

Transparent cellophane with paper header card

Shelf life

36 months

LA MOLISANA

Pad: 11.2 • Stand: D 058

www.lamolisana.it



Organic pasta

La Molisana offers a range of organic pasta made from raw materials grown exclusively through agricultural practices without chemical fertilizers and pesticides. On the pack, the presence of the European Community logo reassures consumers on the origin and quality of food products and on its compliance with the community regulations, with reference to the theme of organic farming. It keeps cooking and is always "al dente". Bronze extrusion makes the surface able to capture sauces like traditional pasta. It is available in 5 sizes: two of long pasta and three of short pasta.

Shelf life

36 months

Packaging details

500 g

Polypropilen



*Breeding, milk,
dairy farm and cream.
That's our toally local supply chain,
which gives us
Butter and
Parmigiano Reggiano cheese*













MONTANARI & GRUZZA SPA - Reggio Emilia - www.montanari-gruzza.it



Freschissimo
Latte di fattoria
della Filiera Panna Ecosostenibile



New range of fresh
creamy butter coming from our sustainable chain
"Filiera Panna Ecosostenibile"

PRODUCT PREVIEW

PASTIFICIO ATTILIO MASTROMAURO GRANORO

Hall: 11.2 • Booth: D 55 A
www.granoro.it



Penne Rigate "Granoro Dedicato"

Thanks to its double rifling and bronze extrusion, Penne Rigate Dedicato guarantees uniform cooking in all its parts and holds the sauce both on the outside and the inside of each single piece. Its increased diameter (compared to classic Penne Rigate) allows it to collect and hold inside even thicker sauces, while preserving its elasticity and texture. It keeps an excellent consistency even if cooked twice while preserving its shape and high quality. The whole Granoro Dedicato line includes 40 shapes.

Shelf life

36 months from date of packaging

Packaging details

500 g
Cellophane

International certifications

Organic Production Method
Iso 14001:2004; Emas; Brc; Ifs; Iso 22000:2005; Kosher; Halal; Ohsas 18001-2007; Sa8000; Aeo

MASTER

Hall: 11.2 • Booth: B 19

www.gnocchimaster.com



Mamma Emma Monoporzioni Striped Gnocchi

Fresh potato gnocchi, steam cooked with the peel. The new freshness saving packaging, composed by 2 singularly sealed monoporzioni will allow the consumer to eat each portion weeks apart from the other. This new packaging will be very useful for people who live alone, which would not eat 400 g of gnocchi in one meal and would be forced to eat the same gnocchi after 3-4 days to prevent the remaining half-package from going bad.

Shelf life

60 days

Packaging details

Thermoformed tray, inside a cardboard cluster

International certifications

Ifs; Brc; Iso2200

PEDON

Hall: 10.2 • Booth: D 071

www.pedon.it



I salvaminuti

The well-known range ready in just 10 minutes is now divided in 6 different clusters, distinguished by their final use. The restyling gives them a new and fresh image. 20 varieties available to meet the demand of modern customers with items characterized by wellness, goodness and quick preparation.

- Classics, the most popular grains
- Soups mix, for the most loved occasions
- Salads mix, hot or cold, perfect for all seasons
- Alternative risottos, grains, pulses and seeds mixes that you can prepare like a risotto
- Rich-in, 3 new varieties for those who choose extra nutritional properties
- Gluten free, 4 varieties certificated gluten free from the Italian Coeliac Association (Aic)

Ingredients

Grains, pulses and seeds

Packaging details

250g

Shelf life

19 months

MOLINO FILIPPINI

Hall: 7 • Booth: A 28 - B 29

www.molinofilippini.com

100% Organic Buckwheat couscous

A complete first course, like pasta and rice, highly digestible, good, low in fats and gluten free: it is the Cous Cous 100% Saraceno by Molino Filippini. A dish that thanks to its nutritional properties is suitable for children, the elderly, sportsmen and all those who love eating healthy and tasty. Buckwheat is a good source of slow-absorption unrefined carbohydrates. It is rich in fibers, minerals and vitamins, in addition it has a high biological value thanks to its protein content. It contains all the essential amino acids we need and has the triple lysine which is necessary for the bones. Naturally gluten-free, it has a high nutritional profile. It cooks in less than 5 minutes saving time, water and gas.

Ingredients

Organic buckwheat flour

Average weight / size

250 g

Characteristics

Gluten Free; Bio; Kosher; Vegan; Fiber Source; Ready in 5 minutes

Packaging

Paper case

Shelf life

18 months



ZINI PRODOTTI ALIMENTARI

Hall: 04 • Booth: D 011

www.pastazini.it



Cauliflower Gnocchi

Gnocchi al Cavolfiore Zini are Zini's latest healthy product. A delicious product, without any compromise. Made of cauliflower (70%), they are rich in vitamins, minerals and represent an important source of antioxidants. This product can be very versatile and can be consumed as a first course, creative side dish of vegetables or even presented as a tasty appetizer. Their low-calorie content makes them particularly suitable for any type of diet. The exclusive patented process of continuous baking, common to all Zini products, makes them incredibly soft, resulting as fresh and soft as if they were handmade. They cook directly in the pan or in a wok with the preferred sauce in just two minutes.

Shelf life

18 months

Packaging details

6x1 kg

The packaging is made with PE material, 100% recyclable

International certifications

Brc; Ifs

MOLINO SPADONI

Hall: 11.2 • Booth: E 051G

www.molinospadoni.it



Teff pasta

Bronze-drawn gluten-free product slowly dehydrated at low temperature. Produced with naturally gluten-free raw materials. The entire manufacturing process is 100% cross-contamination safe. Source of fibres and suitable for vegans. Available in different shapes: penne, paccheri, maccheroni and spaghetti.

Shelf life

30 months

Packaging details

400 g in a carton box

International certifications

Sial Innovation Selection 2018

PASTIFICIO DI BARI TARALL'ORO

Hall: 11.1 • Booth: F 026

www.taralloro.it

Di Bari 100% Italian organic durum wheat pasta

Pasta made from durum wheat semolina of the highest quality cultivated exclusively in Italy. The production process alters as little as possible the raw materials' organoleptic properties and keeps the high percentage of gluten and proteins almost unchanged. Ingredients and shapes are carefully selected and the packaging highlights the artisan production. The presentation of the product in paper bag with four sealings allows a better protection of the content during the transport and the best shelf presentation.

Ingredients

Organic durum wheat semolina, water

Packaging details

500 g in paper bag with four sealing customized by the Di Bari brand

Shelf life

24 months

International certifications

Ifs-Bcr, Iso 14001:2004,

Ou Kosher, Nop/Bio



A.S.T.R.A. BIO / IRIS

Hall: 10.2 • Booth: D 079

www.irisbio.com



Eliche 3 Colours with Spinach and Tomatoes – 500g

Iris special pasta is worked with special dies that enhance the taste and quality of the raw material. The tricolor semolina propellers are produced with an accurate blend of selected grains and enriched with organic vegetables. The traditional method with cold kneading and slow drying at low temperature, makes the tricolor propellers porous, nutritious and suitable for holding any sauce.

Shelf life

36 months

Packaging

Square pack with fin (polypropylene)

International certifications

Bio Icea

SCOIATTOLO – LA TUA PASTA FRESCA

Hall: 11.2 • Booth: A 010A

www.scoiattolopasta.it

Filled Pennette with Genovese Basil Pesto Pdo

A new idea of fresh pasta: tradition and innovation combined together in the first and unique Filled Pennette! Pennette are already stuffed with a delicious Genovese Basil Pesto Pdo. For the first time, the most beloved Italian pasta format melts with the quality of Genovese Basil pesto Pdo. The filled Pennetta is a totally brand new format of patented fresh pasta; the sauce is injected directly into the pasta through a particular manufacturing process. The tasty and high quality filling recalls the fragrance of the authentic fresh basil.

Shelf life

60 days

Packaging details

200 g

Characteristics

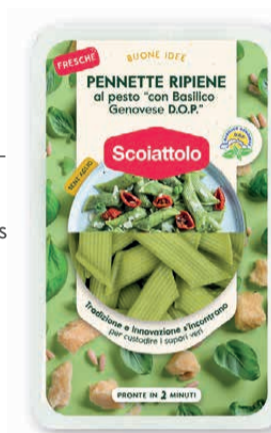
Patented format and production process;

Authentic Italian ingredients

Pdo

International certifications

Pdo certification



end

THE NATURAL SWEETNESS

Dolce Arianna
OIOLI
Gorgonzola DOP

The Gorgonzola OIOLI qualities comes from a story of love and passion for our product; it's the result of the attention and care during all the production phases, founded on the experience of those who have been producing Gorgonzola for over 40 years and does so every day with great enthusiasm.

The Quality with Love

CASA DEL DOLCE, DELICACIES THAT INVADE THE WORLD

THE COMPANY HAS BEEN IN THE CONFECTIONERY MARKET SINCE 1950. CREATIVITY, EXPERIENCE AND INNOVATION ARE THE CHARACTERISTICS THAT DISTINGUISH IT. TOGETHER WITH STATE-OF-THE-ART PRODUCTION EQUIPMENT, WAREHOUSES AND AN EFFICIENT LOGISTIC SERVICE.

Casa del Dolce is a modern and technological company that creates, produces and exports Italian confectionery products to more than 60 countries worldwide. Since 1950, this Italian success story based on passion and experience has managed to transform creative intuitions into successful products. Like Trinketto, the liquid candy loved by children all over the world.

The ancient family recipe: creativity, experience, innovation

Creativity is very important to anticipate timing and the evolution of both society and the market. There is no creativity without research and innovation. The creation of a loved product is the result of a winning blend of technology and know-how with a touch of imagination. A high level of experience is necessary to keep the highest quality standards, products and service.

Attention to the person

In every product only first quality ingredients, like the good Italian tradition teaches us. From container to content: Trinketto is entirely produced in Casa del Dolce. The total control of the process results in a completely safe product for the consumer. BRC/IFS Certification qualifies the commitment and attention to the environment.

Quality and efficiency: nothing sounds sweeter

A modern industrial plant, where technology and imagination create thousands of confectionery products every day destined to Large distribution, cash & carry, normal trade and wholesale. Innovative equipment and logistics facilities make Casa del Dolce a leader in the market.

Through cooperation agreements with the main national and international operators, Casa del Dolce products reach more than two thousand costumers in Italy and in over 60 countries worldwide.

Products for all year-round

Casa del Dolce has designed a product proposal for every retail moment of the year. From summer to Halloween, up to Christmas: the product proposal is updated every 4 months. They know what consumers are looking for and create new product trends: gummy, bubble gum, licorice, candy toys and many other products. They are up-to-date with the latest market trends, constantly striving to innovate and supporting effective sales also through point-of-sale material designed to cover needs both in consuming and exposition format.

Casa del Dolce, una bontà che invade il mondo

Casa del Dolce è un'azienda moderna e tecnologica che crea, consolida ed esporta prodotti dolciari italiani in oltre 60 paesi in tutto il mondo. Una storia italiana fatta di passioni ed esperienze che dal 1950 sa trasformare intuizioni creative in prodotti di successo. Come Trinketto, la caramella liquida amata dai bambini di tutto il mondo. L'azienda produce caramelle destinate alla grande distribuzione, cash & carry, normal trade e all'ingrosso. L'attenzione al mercato, la ricerca, l'innovazione e l'attenzione alla persona sono i punti chiave sui quali l'azienda si focalizza maggiormente.

TRINKETTO THE LIQUID CANDY



WATER, SUGAR
AND TRINKETTO FLAVOR

GLUTEN FREE | WITHOUT COLORINGS

EASY AND SAFE OPENING
12 QUALITY CHECKS FOR BOTTLE

100% PRODUCT IN-HOUSE
FROM THE CONTENT TO THE CONTAINER

how
it's
made

WATCH
THE VIDEO



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DELICATESSEN AND GASTRONOMY CONTEMPORARY

WE WORK EVERY DAY
SO THAT
QUALITY
IS AVAILABLE
TO EVERYBODY.

WE HAVE CALLED IT
"EQUALITÀ"
AND WE ARE PROUD
TO DAILY
SPREAD IT
THANKS.

GIUSEPPE PELLIZZA DA VOLPEDO
1868-1907
IL QUARTO STATO
PARTICOLARE





LA GOLOSA DI PUGLIA, TASTINESS AT HOME

HISTORY OF A FAMILY DAIRY COMPANY SPECIALIZED IN THE PRODUCTION OF APULIAN CHEESES.

The dairy company La Gioia Bella was founded back in 2009 in Gioia del Colle, in the province of Bari by Pasquale Cinieri. Thanks to his intuition and his desire to create a company that produces local cheeses, 100% Apulian and with a unique taste, he created a family business group capable of giving the real taste of Apulia land. The art of the Apulian master che-

ese makers, the passion in creating products that meets the consumers' needs and the search for new flavors to delight the palate are the strengths of the company. In fact, La Golosa di Puglia is the first brand of the dairy company that has gained, over time, a good share of national and international market. La Gioia Bella is the house where good products

are handcrafted. It is the reference point for typical productions throughout the national territory, basing the uniqueness of its products on the collection of milk from local farms. In fact, raw material are directly acquired by local farmers. In this way the authenticity and freshness of the products is guaranteed: a wide choice to best satisfy the different needs of the

most attentive consumers. So, the selection of quality raw materials, associated with scrupulous controls on the production chain, allows the dairy company to have a unique product in terms of flavor and food safety.

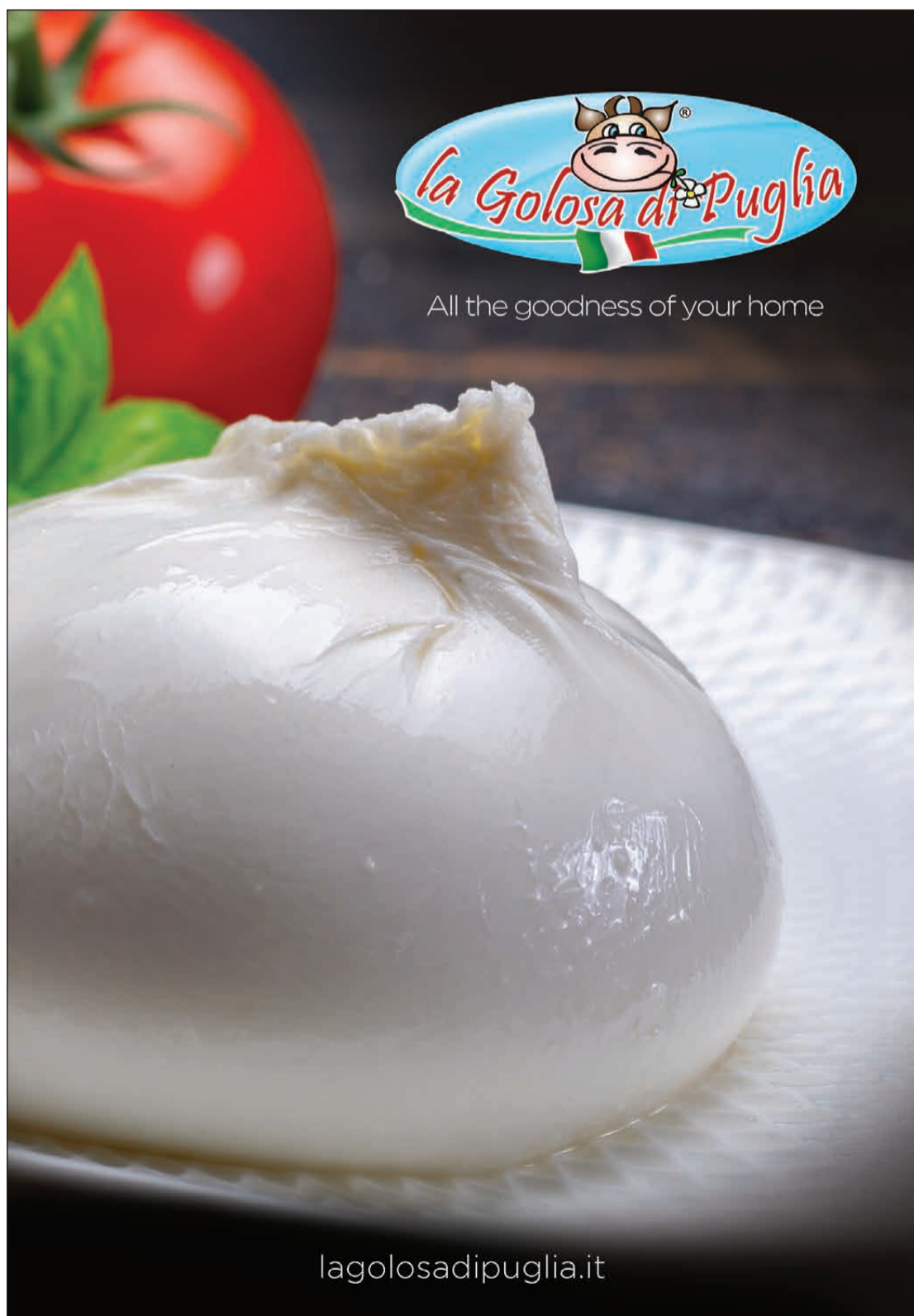
Burrata, the leading product

Burrata is the typical Apulian cheese made of spun paste produced by La Gioia Bella. Although it recalls mozzarella, its texture is much softer and stringier. It is made with cow's milk and has the shape of a white, smooth and soft cloud. Burrata has quickly become popular throughout Italy and then in the world as one of the tastiest and recognizable

typical products of the rich culinary tradition of Apulia.

The production plant of the Group

New and traditional production lines, large working spaces, 2.000 square meters of plant of which 1.400 square meters are used for production, 600 square meters for the temperature-controlled packaging department, 300 square meters of cold storage and 42 employees, make the dairy company La Gioia Bella a great reality. The packaging sector of about 5.000 square meters, added to the 3.000 square meters production, allow a production capacity of over 700 tons of milk per day, with a workforce of over 100 employees.



Good, tasty and genuine, the products of La Golosa di Puglia contain all the authentic flavor of the Apulian tradition.



Handcraft is the key word
Cheeses are made one by one, with great dexterity, according to the Apulian tradition. From the classic Burrata, manually frayed and stuffed, to the Gourmet Burrata, innovative and refined, with more and more delicious fillings, the fresh products, typical of Gioia del Colle, mozzarella fior di latte, nodini and trecce, the seasoned handcrafted and cared. All the products are like they used to be: they are made specifically to bring all the goodness of your home to the table.

La Golosa di Puglia, tutto il buono di casa tua

Il caseificio La Gioia Bella è stato fondato nel 2009 a Gioia del Colle, in provincia di Bari da Pasquale Cinieri. Grazie alla sua intuizione e al suo desiderio di creare un'azienda che produce formaggi locali, 100% pugliesi e con un gusto unico, ha creato un'azienda familiare in grado di regalare il vero sapore della Puglia. L'arte dei maestri casari pugliesi, la passione nel creare prodotti che soddisfano le esigenze del consumatore e la ricerca di nuovi sapori per deliziare il palato sono i punti di forza del caseificio. Infatti, La Golosa di Puglia è il primo marchio dell'azienda lattiero-casearia che ha acquisito, nel tempo, una buona fetta di mercato nazionale e internazionale.



www.pezzana.it

WHITE RIND CREAMY CHEESES

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ALIMENTARIA CHANGES PACE

INTERVIEW WITH JOSÉ ANTONIO VALLS, GENERAL MANAGER OF THE SPANISH EVENT, WHICH WILL BE BACK IN 2020 WITH A COMPLETELY RENOVATED LAYOUT. ITALY WILL BE A PROTAGONIST. HERE, PREVIEWS AND NEWS ON THE INTERNATIONAL TRADE SHOW, WHICH WILL BE HELD IN BARCELONA BETWEEN APRIL, 20TH TO 23RD.

The latest news and previews on the 2020 edition of the main food fair in Spain. An event, which is getting more and more international and will be back next April, from 20th to 23rd, with a completely renovated layout. Focus on the Horeca sector. And on the ecommerce rise. The major market trends. An across-the-board interview with José Antonio Valls, general manager of Alimentaria.

Alimentaria, scheduled next April, from 20th to 23rd, is less than a year away: what changes in 2020?

Next year, Alimentaria will celebrate its 23rd edition. And in 2020, it will have a completely renovated layout. In fact, until the 2018 edition, wine had a central position during the event. But, starting from next year, things will change, as the Barcelona Wine Week was launched: a new international fair, devoted to Spanish products, which will be held from February, 3rd to 5th 2020. As a consequence, Alimentaria will be centred on food, in the attempt of making something different from Anuga or Sial – other major food fairs in Europe -, by emphasizing targeted distribution areas.

Which ones?

We decided to address the Horeca sector. In fact, it is a fast-growing market. And all the different areas of Alimentaria will try to encourage, even more than before, meetings between producers, retailers and buyers. We will focus on some key industries of the food sector: the meat (Intercarn), dairy (Interlact), cannery (Expoconser) and bakery (Snacks, biscuits & confectionary) industries. Alimentaria will also devote great scope to the Mediterranean diet, with

Alimentaria cambia passo

Intervista a José Antonio Valls, general manager della manifestazione spagnola. Che torna nel 2020 con un layout completamente rinnovato. E dove l'Italia sarà assoluta protagonista. Tutte le anticipazioni e le novità sulla kermesse internazionale di Barcellona, in scena dal 20 al 23 aprile prossimi.

olive and vegetal oils (Mediterranea foods), and to food service (Restaurama). In addition, Grocery Foods will gather the main consumer goods companies. Finally, the area devoted to small machinery and equipment for hotels and restaurants will be very important too. It will be in the hall number 6 and 7, besides the Atmosphere area (hall 8), dedicated to lightening and décor.

What will the next edition will be focused on?

On the one hand, we will give great importance to local products, thanks to the Lands of Spain area, which will gather excellence from all the Spanish regions. We will also pay a lot of attention to the latest consumer trends. In a very practical way: at the core of the exhibition, there will be the Alimentaria Trends area, covering 4.500 square meters, where visitors will find Fine Foods, Organic Foods, Free From and Functional Foods, besides Halal Foods.

As for numbers and figures, what's your goal?

At present, with an exhibition area of 100 thousand square meters, Alimentaria is the third food fair in terms of dimensions. A prestigious event renowned internationally. In fact, it packs in over 150 thousand professionals, 30% of them from 156 countries all over the world.

As for the exhibition, we aim at doing better than the previous edition, where there were 4.500 companies from 70 different countries. However, Alimentaria also means 200 events, workshops and conferences, and over 12.500 business meetings.

So, Alimentaria is becoming more and more an international business hub?

That's it. Alimentaria visitors are not only interested in Spanish products, they also come to Barcelona to discover the many different opportunities at an international level that our exhibition offers. Buyers visiting the exhibition mainly hail from Southern and Latin America. In particular, Mexico, where we also host a spin off dedicated to Alimentaria, is a market of great interest, which is more and more opening up. We have been observing that reality for some time, and we are developing it with great care.

How is your incoming activity organised?

We boast a well-structured incoming programme, with more than 1.400 buyers from 76 countries all over the world, that we periodically host. Clearly, we care a lot about Italian buyers, who represent the whole retailing and distribution industry: we invited Coop Centro Italia, Iper Montebello and Magazzini Gabrielli, just to mention some. Anyway, our programme also includes many other big retail companies, such as Mgm Alimentari, Buzzi, Marr and Optimum buying.

How much space is dedicated to Italy at Alimentaria 2020?

Almost 2 thousand square meters will be provided to Italian exhibitors. 200 firms, mainly representing the pasta, oil, fresh products, organic and fine foods industries. Italy is a record-holder

at Alimentaria, for the number of exhibitors and visitors, and occupied areas. We also confirmed our partnership with the Italian Trade Agency (Ita), as well as with the Italian Chamber of commerce and industry for Spain. Moreover, we boast a consolidated collaboration with Assica (Italian trade association representing meat and cold cuts producers) and the Parmigiano Reggiano Consortium. In addition to many other bodies representing typical Italian products. Italy is definitely a key Country for Alimentaria.

So, the next edition will be more and more focused on premium products ...

Exactly. That is what the market keeps asking. And that's why we will devote a specific area to this kind of products, Alimentaria Premium, where a chosen number of Spanish producers of excellence will find space. Real food masters, with a top offer.

There won't be international producers at Alimentaria Premium, will they?

No, at the moment, that area will be devoted exclusively to Spain. But, for the future, we are working to offer a similar opportunity to other countries renowned for their products of excellence, just like Italy.

As for meetings and events, what's in the agenda?

According to tradition, the exhibition will host the Alimentaria 2020 cooking show, as well as areas dedicated to other cooking shows spon-

sored by exhibitors. In addition, almost 50 Michelin-starred chefs will be present to interact with visitors during dedicated masterclasses and debates. Moreover, we also set up The Alimentaria Hub ...

What is that about?

It's a space devoted to different subjects and projects revolutionising the food chain by working on sustainability and tracking through the blockchain. As well as by fighting food waste and supporting digital transformation. And by analysing consumption patterns and big data. It will be a true 'must visit' for visitors. In order to delve into these topics, and many other, and to be updated and to develop contacts, all at the same.

Which are the main trends spreading in the Spanish food industry at the moment?

Currently, the emergence of the e-commerce is a hot topic. Not only in Spain. It is a real challenge for the whole sector. Both for producers and retailers. In my opinion, it is a trend applying across the board. It is about being even closer to consumers, exploring their habits and needs. In Spain, online purchases are still a niche, accounting for 1% of the total sales, but figures are rocketing. Therefore, it is an emerging phenomenon that must be monitored. Especially because big retailers and specialised normal trade are more and more concerned. Then, on the Spa-

nish market, there are other aspects to take care about.

Which ones?

First, digital transformation, which is linked to production efficiency. But, most of all, consumers pay more and more attention to nutritional aspects, health and well-being, which are related to the development of the organic segment, the success of free-from products and the growing vegetarian and vegan trend. In addition, the clean label is becoming a more and more crucial topic.

Last question: what would you suggest doing to a companies taking part to Alimentaria 2020 to maximise their presence at the exhibition?

First of all, I suggest Italian companies not to come to Alimentaria only to start exporting or to expand their market in Spain. The event, in fact, is a preferential gateway to many other markets: there are many visitors and dealers from Latin and South America who can offer them important outlets in diverse areas and channels. That is why Alimentaria boasts consolidated partnerships with the most influential trade associations, both in the distribution and foodservice channel, across America. Then, I can also suggest them preparing carefully their participation at the exhibition. Not only as for contacts and networking activities. But especially with a fitted out stand, besides a well-programmed welcome to dealers.

ITALIAN EXCELLENCE



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

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AFRICAN SWINE FEVER DISRUPTION

ONE YEAR AFTER THE EPIDEMIC BROKE OUT IN CHINA, THE SITUATION IS ALARMING. AND IT DOESN'T ONLY INVOLVE ASIA. RABOBANK'S ANALYSIS SHOWS HOW IT WILL IMPACT ON GLOBAL MARKETS.

Beyond any prediction. In China, losses due to the African swine fever (Asf) are unprecedented and shake markets, disclosing new scenarios. Pork production, in fact, is growing worldwide, except for China, where, in 2019, a sharp decrease is expected. That's the overview depicted by Rabobank, a Dutch financial services provider, that analysed the situation of the global market.

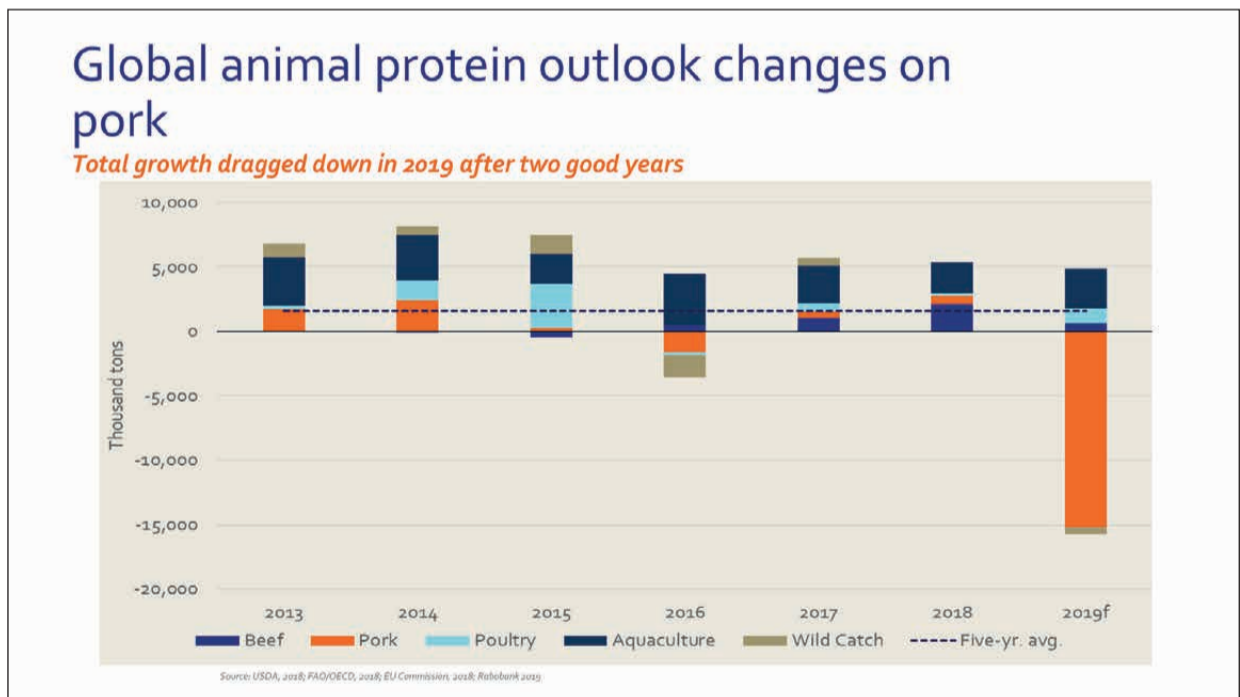
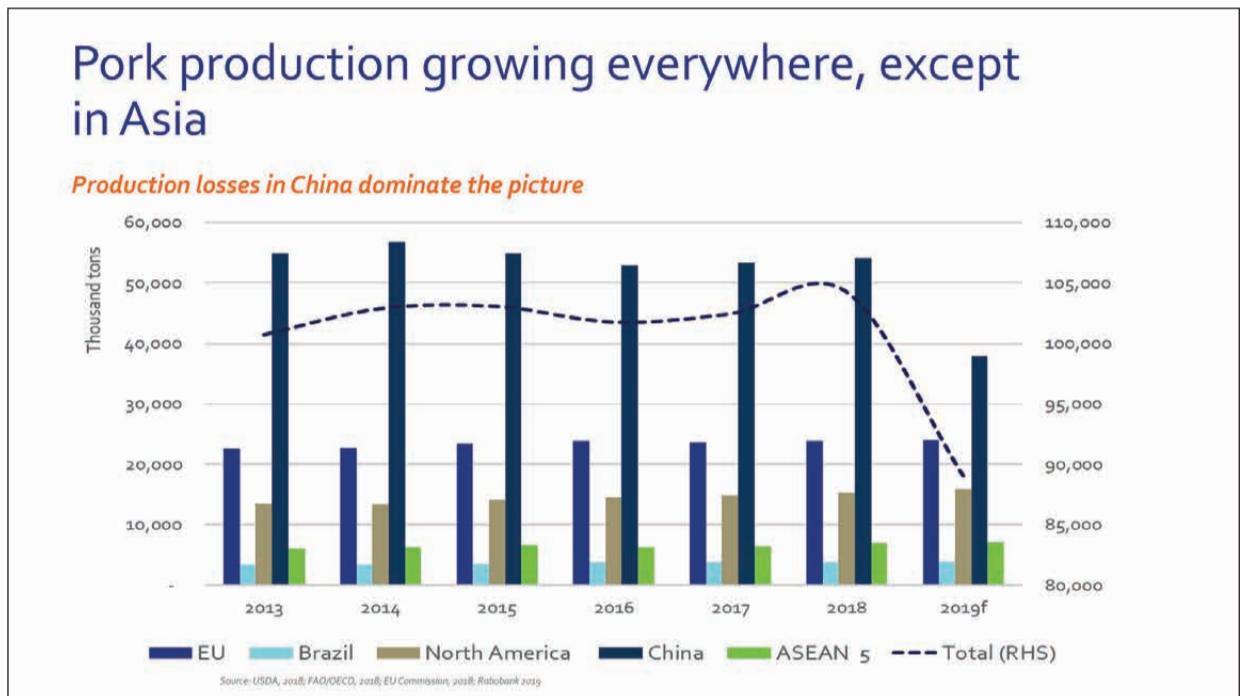
The epidemic's outbreak

The African swine fever is caused by the Asfivirus, which is transmitted via direct or indirect contact and is fatal in almost all cases. It is one of the most devastating diseases hitting pigs and wild boars, anyway, it cannot be transmitted to human beings. Asf first broke out in Eastern Europe in 2014. Then, it spread in Poland, the Baltic Countries, Romania, Hungary, Czech Republic and Bulgaria. While the latest data released by the European Commission, updated on July, 15th 2019, report 290 cases on domestic pigs in Romania, besides worrying data regarding wild boars: 476 in Belgium, 745 in Hungary, 302 in Lithuania and Romania and even 1.373 in Poland. In Italy, the African swine fever is present only in Sardinia, where the number of foci has always been variable over the years since 1978, when it first broke out.

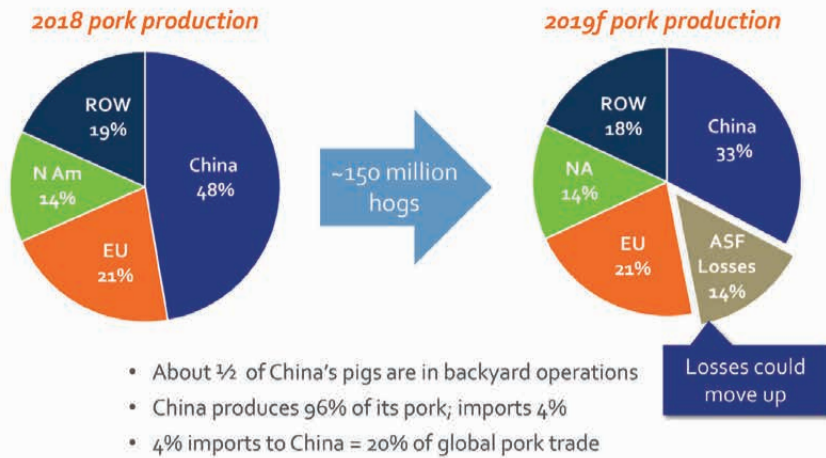
Striking figures

The Asf suddenly started in September 2018, from Liaoning to the provinces in North-Eastern China, and then it fast spread in many areas of the Country. As there exists neither vaccine nor treatment, and as it is particularly violent, to contain the epidemic, the Chinese government obliged farms where cases were reported to kill all animals. And so did every farmer within three kilometres from the concerned farm. Nevertheless, containing and stopping the epidemic's spreading is complicated: scientists haven't understood yet where Asf originated from. And, most of all, new cases aren't always reported, as local governments cut rewards for farmers doing so.

In 2018, China used to produce 48% of pork meat worldwide. At the beginning of 2019, its production went down to 33%. Since the Country has always met the domestic demand thanks to its farms, Asf will turn out be a real godsend for exporters. In fact, the pre-Asf Chinese imports accounted for 20% of the global pork trade, and it will necessarily grow in the near future. In addition, animal proteins demand will increase in order to substitute pork meat. Beef, lamb, fish and poultry imports will rise, and necessarily their prices will rocket. To the benefit of exporters such as the European



China's ASF losses are globally significant

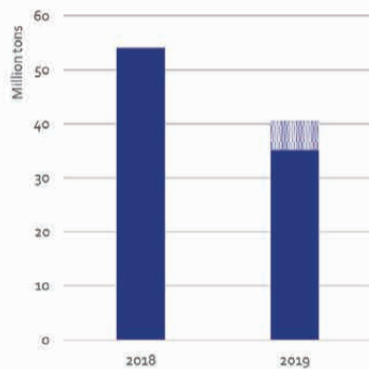


- About 1/2 of China's pigs are in backyard operations
- China produces 96% of its pork; imports 4%
- 4% imports to China = 20% of global pork trade

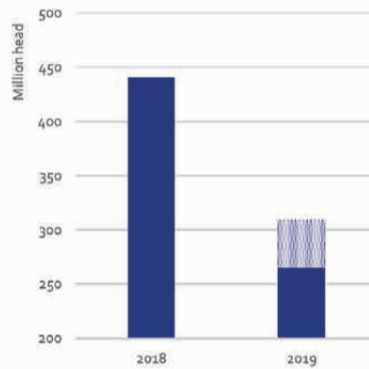
Source: USDA; Rabobank, 2019

Unprecedented losses in China

Pork production down 25-35% in 2019



Herd down 30-40% in 2019



Source: Rabobank, 2019

Union, the United States, Brazil and Canada. Moreover, the epidemic is spreading in South-East Asia too. In fact, since the beginning of February, Asf has hit 52 provinces and cities in Vietnam, where production is expected to decrease by 20% within the end of the year.

Italy: managing new situations

Given the situation, Italy will have to adapt. According to studies carried out by Eurostat and Rabobank, import and export will go up in the future. And prices might increase too compared to other markets. As one third of Italy consumption depends on imports, the Country will have to manage fluctuations in raw materials' prices and to adapt its supply strategies, taking into account consumers' demands and needs. In fact, they pay more and more attention to the healthiness, quality and origin of what they eat.

Terremoto peste suina

A un anno dallo scoppio dei primi focolai nel Liaoning, la situazione è allarmante. E non coinvolge solo l'Asia. Le perdite subite in Cina non hanno precedenti e scuotono il mercato, aprendo nuovi scenari. La produzione di carne di maiale, infatti, cresce ovunque nel mondo, tranne che nel paese della Grande Muraglia, dove, nel 2019, è previsto un drastico calo. Il panorama tracciato da Rabobank, fornitore di servizi finanziari olandese, che ha analizzato la situazione del mercato globale.

follow



*Making Apulian cheeses
the traditional way
with whey starter culture
since 1957*



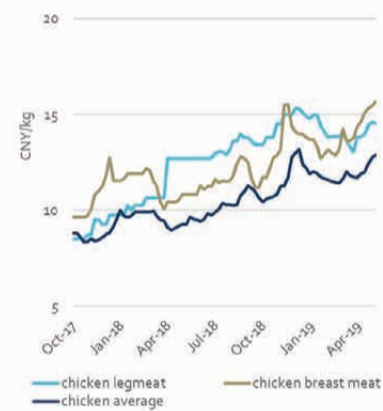


Chinese consumers are already substituting pork

Pork prices show little sign of shortage



Chicken breast meat prices up strongly

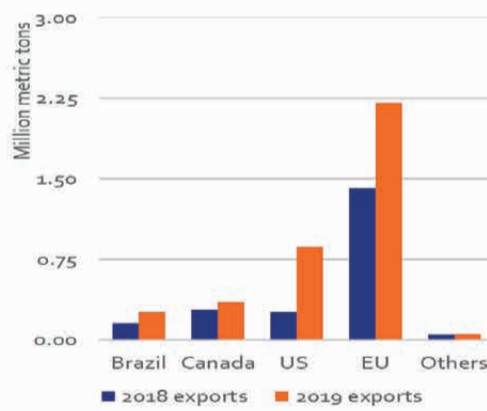


Source: Bayer, Rabobank, 2019

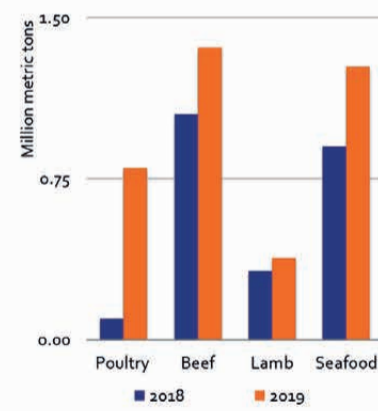


China will demand, and pay for, more protein imports

China's pork imports to grow markedly

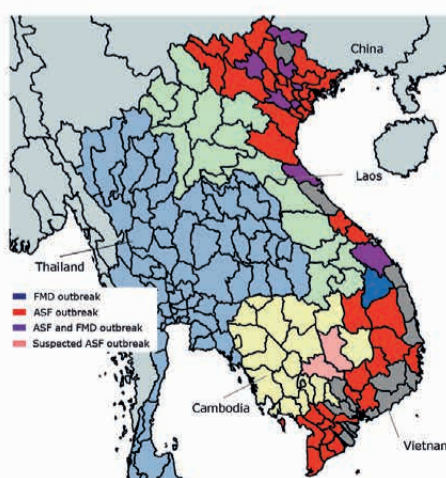


China will increase all imports



Source: China Statistics Yearbooks; USDA, UN Comtrade; Rabobank, 2019

ASF expected to reduce pork production in Vietnam by ~20%



ASF has hit 52 provinces and cities since February 2019

At current pace, and given the development of ASF in China, Vietnam's production losses could reach 20% by year-end

Source: FAO, news media; OIE; Rabobank 2019

ASF continues spreading in Eastern Europe



Source: FLE, OIE, Rabobank, 2019

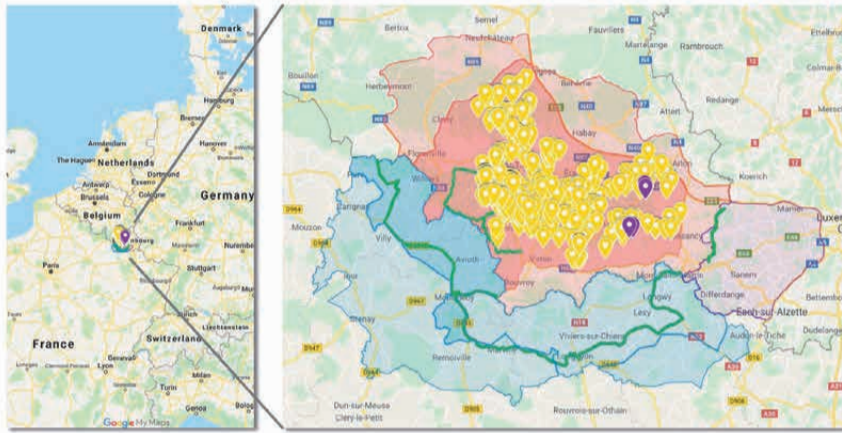
In 2018 exports made up 44% of total production in Poland, with 12% going outside the EU

Russia continues expanding production, to more than 3.2 million tons in 2018, despite ongoing cases of ASF

The Czech Republic has been declared free of ASF, one year after an isolated outbreak

ASF outbreaks in Belgium are slowing, but remain serious

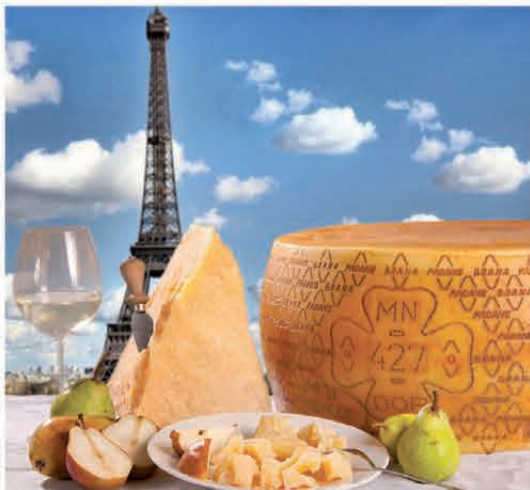
Cases are 1 km to France, 45 km to Germany, and 150 km to the Netherlands



Source: OIE, PigProgress Rabobank 2019



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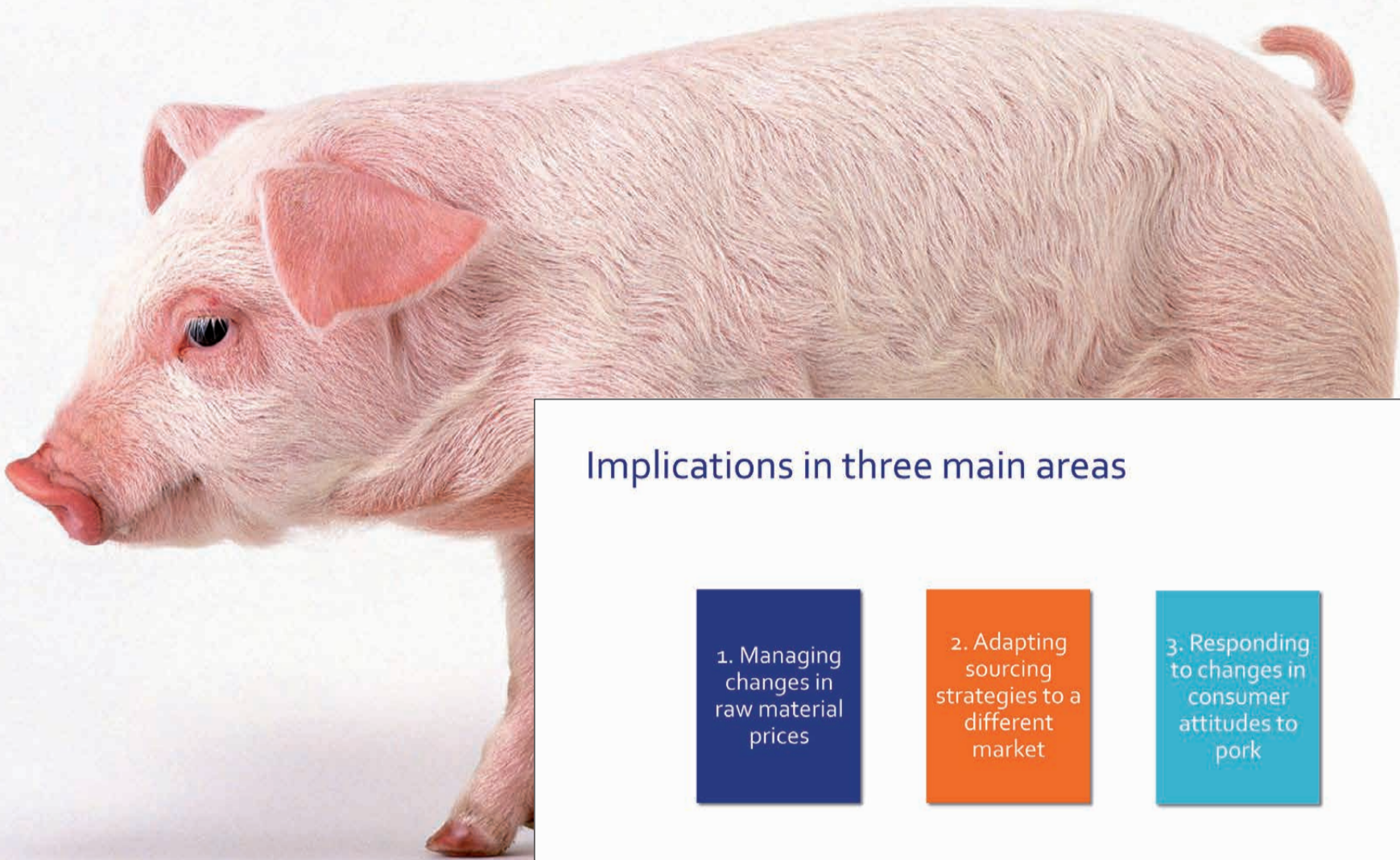
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Implications in three main areas

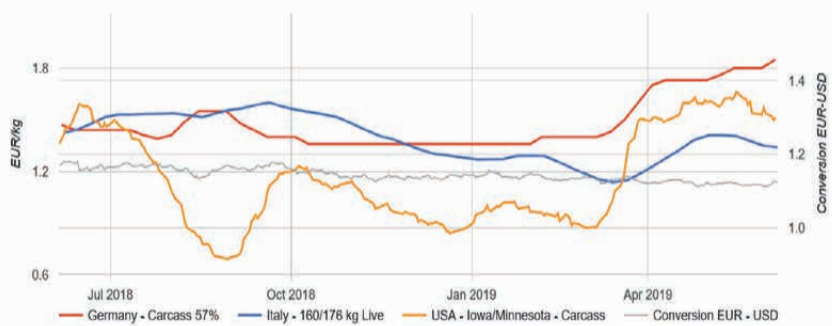
- 1. Managing changes in raw material prices
- 2. Adapting sourcing strategies to a different market
- 3. Responding to changes in consumer attitudes to pork

Source: Rabobank, 2019



1. Rising carcass prices put pressure on the supply chain

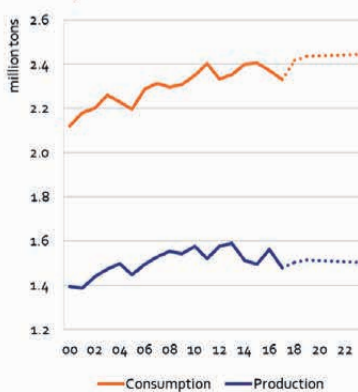
Pig prices in Italy have room to move up relative to other markets



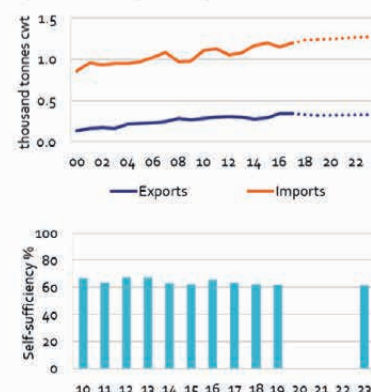
Source: Pig333; Rabobank 2019

Italy imports more than a third of what it consumes

Stable production



Imports and export expected to increase

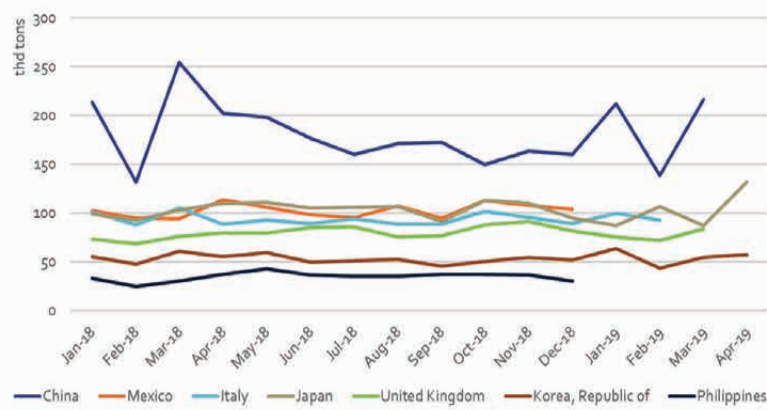


Source: Eurostat; Rabobank 2019

China dominates global pork trade, but Italy also significant

Sourcing to move from transactional to long-term partnership basis

Monthly total pork imports



Source: ITC Trademap, Rabobank 2019

3. Consumers given (another) reason to question consumption

Consumers remain engaged on protein



Online searches show that consumers see eating protein as a 'good' thing – and this is not changing

Source: Google, Rabobank, 2019

Four main drivers of consumer preference



end

kids know it already...
The packaging with the Rose makes all the difference



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GRANA PADANO ... AND MUCH MORE

SIMILAR PRODUCTS, THE RELATIONSHIP WITH PARMIGIANO REGGIANO, THE NEW LOGO. AND TARIFFS IN THE USA. AN ACROSS-THE-BOARD INTERVIEW WITH STEFANO BERNI, GENERAL DIRECTOR OF THE CONSORTIUM.

We are at the Meeting in Rimini. Stefano Berni, general director of the Grana Padano Protection Consortium, is one of the speakers at the conference titled: 'L'economia solidale conviene al Paese', 'Fair economy is convenient for the Country'. Together with Vitaliy Novikov, chief executive officer of Coca Cola-Hbc Italia; Jacques Vandenschrik, president of the European Food Banks Federation; Marco Lucchini, secretary general of Fondazione Banco Alimentare Onlus. To talk about domestic and international subjects. (Very) Hot topics. Stefano Berni doesn't take a step back and address them confidently.

From June, 4th, it isn't possible anymore to produce Grana Padano and similar cheeses in the same room and with the same equipment. It is stated by the new regulation of the Consortium. Your balance?

Actually, having separate production lines was compulsory even before June, 4th. The new regulation states that it is necessary to have different rooms too. In fact, similar cheeses must be produced in different places, which are physically separate from those used to make Grana Padano Pdo. The 12 members of the Consortium, that produce also similar products, have to adapt. As production lines were already distinct, differentiating the rooms isn't so complex. They just need to place dividing walls. Clearly, someone needs more time. In fact, they already asked us to extend the deadline to December. For us, it is not a problem to allow more time, when there is a reason.

You are working on a new brand identity for Grana Padano. Can you reveal something more as for this topic?

As for packaging, which will be disclosed at the beginning of 2021, we thought to adopt a more uniform pack, with some compulsory distinguishing marks on the boxes of all the brands and produ-

cers. It was a long, hard work. We were helped by the università Cattolica of Piacenza and by a specialised agency (Packaging in Italy, from Parma). Regarding the logo restyling, we will need to change the regulation. It will be more modern and eye-catching. The rhombus with the writing Grana Padano won't be replaced, it will just have smoother lines.

When will you launch the new logo?

At least a couple of years will be necessary. We are waiting for the final approval to the last modification of the regulation, which should be definitive within September. Then, we will be able to forward a new request for modifications. There are rules to follow: first of all, the new logo must be presented to the ministry and published officially on the Journal, where everyone can see it and make remarks. Then, it can be sent to Brussels where it is analysed and published on the European Official Journal for any observation by the Member States. Briefly, two years are necessary to modify the regulation. In the past, for minor modifications, there existed the temporary protection; the Italian ministry gave the authorization and, after some months, issued the permit. Now it isn't possible anymore ...

Such a long procedure to change a logo? Incredible ...

It is right that everyone, in Italy and the Eu, has enough time to make observations on such drastic changes. Two years maybe are too much ... We hope the new European governance makes this procedure faster.

As regards prices, the difference between Grana Padano and Parmigiano Reggiano is significant. What's your opinion?

I hope it remains as it is (he smiles, *editor's note*). Generally, over the past years, Grana Padano used to drive ebbs and flows in prices. With Parmigiano always in



Stefano Berni

the lead, of course. This time, on the contrary, Parmigiano has led Grana Padano's prices, this is why I hope it remains as it is. I think Parmigiano Reggiano made a clever choice: extending the ageing period and its turnover. Having less ready-to-sell product in stock and pushing the prices' increase. Sales, in terms of quantities, largely benefited from this initiative. Last year, we experienced unimaginable sales performances (especially in Italy), which reduced our stock. Prices went up by around 30%. At the moment, wholesale prices of Grana Padano and Parmigiano Reggiano are very good. But we are aware that they are too high. Clearly, we hope they last as much as possible, but it is unlikely that Grana Padano 9 months will be sold at more than 8 euros and Parmigiano Reggiano (12 months) over 11 euros for the whole 2020.

Talking about Parmigiano Reggiano, what's your relationship with them? Given their appeal for the lysozyme case ...

Besides their choice – appealing against the ministry's decision not to consider the lysozyme as a preservative of Grana Padano, but as a co-adjuvant that must be written on the label as it may be a potential allergen deriving from eggs -, I think we had, and still have, a good relationship. For example, at the moment, we are working together to tackle the possible threat of tariffs in the United States. Just like we did for all the initiatives related to the Italian and European regulations on production plans. As for the lysozyme case, we are waiting for the judgement of the Regional Administrative Court. But I'd like to say something more.

Please.

Recently, on the occasion of the

Grana Padano e dintorni

I prodotti simili, i rapporti con il Parmigiano Reggiano, il nuovo logo, i dazi Usa. Intervista a tutto campo con Stefano Berni, direttore generale del Consorzio, in occasione del Meeting di Rimini.



election of Nicola Prandini as Coldiretti president, I was invited near Brescia to make a speech titled 'Obbligati ad amarsi', 'Forced to love each other', where I showed, through charts and graphs, that, on the medium term, the prices of Parmigiano Reggiano and Grana Padano have always adjusted to each other. There is no time coincidence, but, by analyzing each semester, it has always been so: two parallel lines with a difference ranging from 2 to 3 euros.

Tariffs in the Usa, it is a hot topic, isn't it?

A lot. It is real problem. 230 thousand wheels of Parmigiano Reggiano and 150 thousand wheels of Grana Padano are affected. If tariffs were really as announced by Trump on twitter, exports would be downsized significantly. If it happened, we are afraid and expect

that two thirds of the two cheeses won't be exported there anymore. If tariffs are equal to the product's price, it means that it is sold at twice today's price. Considering that the American Grana is very similar to ours, the impact on wholesale prices would be devastating for us. When we had the case of Russian tariffs, we were forced to relocate 50 thousand wheels. It wasn't easy, yet affordable. It would be extremely different to relocate almost 400 thousand wheels (around 6% of the total production). Then, Brexit shouldn't be underestimated. They are all international matters that are not favourable to our market.

In March, the new president of the Consortium will be elected. Your expectations and desires?

It will be a hard moment. Cesare Baldrighi will celebrate 21 years as president. There exists a real symbiosis between the whole structure and its top. Baldrighi has proven to be a balanced and competent president. Truly representative. It won't be easy to substitute him. But I'm sure that the next president will continue pursuing its goals.

As for the Horeca. Please, tell us more on your proposal for the restaurants' menus.

According to a research carried out by the università Cattolica of Piacenza and to Iri data, over 35% of the Italian families' food budget is spent away from home. In supermarkets and traditional shops, the Grana Padano share is equal to 54%, similar products account for 13%. Except for high-level restaurants, Parmigiano Reggiano is almost absent from the Horeca sector, where similar products are preferred. People who decide to eat at the restaurant look for fast service and low prices. They do not want to know the ingredients. On the contrary, they are interested in finding a good and low price meal, and a fast service. My sons are an example ...

I can state the same about mine ...

Fast food restaurants, with cheap products, use similar products because they are less expensive. And, considering how they use them, they can easily replace Grana Padano. But it would be different if it was compulsory to write in the menus if they use Grana Padano, Parmigiano Reggiano or a similar product. Or if ham is Pdo certified or not. If olive oil is Italian or from the European community. I think that people would think longer on getting back in a restaurant where Eu olive oil is used. The same applies to ingredients used in supermarkets' gastronomies.

That is a good idea. How can it be applied in practice?

With a specific legislative decree. That I have already written. A couple of lines that state: "Restaurants must indicate, in the menus given to consumers, which products are used as regards olive oils, cheeses and meats". It's simple, a couple of lines. I presented this proposal to Andrea Comacchio and Luciano Nieto, respectively, head of department and head of the technical secretariat of the former Agriculture minister Gian Marco Centinaio.

How is the relationship between cooperatives and industries?

In the Grana Padano Consortium, it is positive. Clearly, if cooperatives' production grows and private companies' decreases. The cooperation must make room to the member farms' propensity to increase production. In fact, as provided by regulations, it must gather all the milk by all the producers with no limitations. In absolute terms, in 2018, cooperation almost reached 63% of the total production. Industries 37%. Nevertheless, I can affirm that, during the meetings of the board of directors, made of 14 cooperative members and 12 industrialist, there have never been strong contrasts. We do not always reach unanimity du-

ring the board's meetings, but discussions are always useful.

What about Coldiretti?

We have a good relationship with them.

But they are trying to arrogantly enter consortia, to count more and more.

Professional associations have always played a role. I think it is understandable. As far as I know, professional associations are present in the consortia (Grana Padano, Parmigiano Reggiano, Asiago and Provolone). Maybe indirectly, through their representatives, but they are in. Representatives from Coldiretti, Confagricoltura and Cia have always participated to the assemblies of the Grana Padano Consortium (and we have at least two meetings a year). Surely, they push to increase their influence. And recently they had tried to add specific articles in ministerial decrees, that were later postponed.

I would like to conclude remembering two prominent persons of the sector, who left us in August: Giovanni Ferrari, founder of the historic cheese factory in Lodi, and Stefano Pernigotti, president of the Latteria di Mantova, who was well-appreciated both by cooperatives and industrials.

I deeply respect Giovanni Ferrari, to whom I am grateful. A clever person and founder of the Grana Padano protection consortium. Last year, in September, we celebrated its 90th birthday in a restaurant. While Stefano wasn't even 60. He was one of the wisest and most far-sighted directors. He could have been chosen to be director of the Consortium. In fact, during his presidency, Latteria Sociale made big steps forward. But, most of all, he was an extraordinary person and a good friend. I tried to stay as close as possible to him when he was suffering. He was at the height of its activity. He was also nice, kind and generous, a measured person. The sector lost a true protagonist.



THE FINOCCHIONA
PGI CONSORTIUM
WILL BE PRESENT
AT ANUGA AT HALL
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FINOCCHIONA PGI CONQUERING MARKETS

Following a very positive 2019, the 'queen' of the Tuscan cold cuts doesn't take a break. Indeed, last year, Finocchiona Pgi experienced a 14.3% increase in production, with almost 1.9 million kilos of fresh paste, meaning 740 thousand pieces that would result in Finocchiona, after the ageing period. As for production, during the first seven months of 2019, the 2018 positive outcome was confirmed: 1.082 million kilos of fresh meat were processed, that is to say 1.200 kilos more compared to the same period in the previous year. A slight 0.12% increase. Which means that Finocchiona consolidates its placement on the market, being more and more appreciated by consumers, thanks to the promotion activities organised by the Consortium.

Last year, 1.43 million kilos of certified Finocchiona were released, a 7.33% growth. The portioned and packed product set a very positive trend too, up by 25.8% compared to 2017 with 343 thousand trays, equal to 457 thousand kilos of product. While, sliced product trays experienced a decrease, with 2.8 million packages. Around 48.5% of the products were sold as an entire piece, while 31.7% were sold vacuum-packed, and 19.7% sliced and packed in trays. The Consortium estimates the 2018 production to be worth 10.7 million euros, and the 2018 sales over 18.5 million euros.

In terms of certified products released, during the first seven months of 2019, another 1.44% increase was recorded, around 12 thousand kilos more. Figures confirmed by data referred to vacuum-packed and sliced products: this kind of packaging keeps on growing, recording in July a 27% increase

compared to the first seven months of 2018, totalling over 300 thousand kilos of packaged product. While more than 1 million trays of sliced product were sold in the first seven months of year, equal to around 110 thousand kilos, a 7.9% decrease.

"We are happy with the results of the first part of the year", states Alessandro Iacomoni, president of the Finocchiona Pgi Consortium, created in 2015. "These figures confirm the success of a typical product, whose taste represents the history and traditions of Tuscany. They also prove the daily commitment and passion of our affiliates, who decide to invest on quality every day. We are optimistic about the second half of the year. We hope to increase our production, getting near, or even exceeding, 2 million kilos of fresh paste".

According to the procedural guidelines, Finocchiona Pgi can only be produced in



Finocchiona Igp alla conquista dei mercati

Crescono nel 2018 i volumi di produzione e commercializzazione dell'insaccato toscano. Che aumenta e consolida il suo successo in Italia e all'estero.

Tuscany. In 2018, Arezzo, with 524 thousand kilos of certified product, passed Siena, with 519 thousand, that was followed by Florence, with 305 kilos. 95.5% of the products were Finocchiona Pgi, with around 1.4 million kilos of certified product. While 0.4% (equal to 5.500 kilos) got the double quality certification of the Finocchiona Pgi of cinta senese Pdo. Also organic products experienced a growth: in fact, in 2018, 60 thousand kilos of organic Finocchiona Pgi were certified, equal to 4.1% of the products released. After some affiliates started this kind of production, the whole Consortium got interested, and intends to pay close attention to this segment also in the future.

Italy is still the reference market with 70.2% of the shares, but exports are increasing, especially in Germany, where 20.6% of certified product are commercialised. Exports towards Eu Countries account for 28.8% of the shares. While in the rest of the world (1%), Japan is surprisingly the first Finocchiona Pgi consumer, followed by Switzerland and Canada. With the aim of consolidating its presence on foreign markets, the Finocchiona Pgi Consortium decided to participate at Anuga, in Cologne, at the beginning of October. "For the second time, we are taking part at Anuga and we are proud to bring a bit of Tuscany with us in one of the most important exhibitions of the sector", explains Mr. Iacomoni. "Germany is our second market, after Italy. We hope to expand our export shares in the Eu and abroad, thanks to this kind of events: as we will have our stand, we will be able to give visibility to our product and to let visitors taste it, especially those who haven't tried it yet".



IN 2018, THE PRODUCTION AND COMMERCIALISATION OF THE TYPICAL COLD CUT FROM TUSCANY WERE ON THE RISE. WHILE, IN THE CURRENT YEAR, THE CONSORTIUM HAS RECORDED A FURTHER GROWTH AND SET AMBITIOUS GOALS. WHICH WILL BE ACHIEVED ALSO BY PARTICIPATING AT ANUGA.



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ARMONIE ALIMENTARI: OUR PRODUCTS' SYMPHONY



THE STORY OF AN EMILIAN FAMILY BUSINESS. FROM ROCKWOOL TO PARMIGIANO REGGIANO '63 ESSENZE DEI PRATI STABILI'. AN INNOVATING PROJECT ON THE PDO CHEESE. INTERVIEW WITH GABRIELE MENOZZI.

I'm in Bibbiano, in the province of Reggio Emilia. Here, Armonie Alimentari has its premises. In front of me, Gabriele Menozzi, a very likable guy and an excellent narrator. With a burning passion for its job and the story of its family. From agriculture to mechanics, to end up in the agri-food industry. Interview with Armonie Alimentari's manager.

How was Armonie Alimentari born?

It was born in Bibbiano, the 'cradle of Formadio', ancestor of Parmigiano Reggiano. The most ancient documents related to this kind of cheese do actually come from my town. Bibbiano's economy is based, today as it was in the past, on the agri-food industry, namely on cheese factories and Parmigiano Reggiano. At present, our town alone produces over 120 thousand wheels per year, from seven different cheese factories, accounting for 3.2% of the total production.

You are a family business. What's your story?

In few words, we were farmers. My grandfather, Ernesto Menozzi, had the chance to study and became an accountant. Once graduated, he went working with his brothers, who had started a pig farming business. He used to deal with accountancy and sales. Then, he decided to change job and was hired by a firm of extruded polystyrene and rockwool. Throughout the years, he managed to become a shareholder of the company, thanks to his passion for his job, and succeeded in starting a second business with my father and uncle. His company grew and today it is one of the main firms in the insulation field.

How did you move from rockwool to the food industry?

In a very simple way. In 2014, we decided to invest on Parmonie, a cracker made of Parmigiano, invented by the baker of Bibbiano between 1999 and 2000. At the be-



ginning, the product was sold loose in the Conad supermarkets in Reggio Emilia and in its bakery. We thought it had a great potential. This is how Armonie Alimentari was born. To produce Parmonie, just like the baker used to. Soon after, it became a success.

A comeback to the Parmigiano Reggiano world.

Of course. Parmigiano Reggiano is a distinguishing ingredient of the Parmonie's recipe, which is the original one, and provides the product a unique taste. We didn't stop here, anyway.

What else did you do?

Besides Parmonie, we tried to understand how to narrate Parmigiano's characteristics and how to promote the qualities of the cheese produced in the Enza Valley. A project came to light: '63 essenze dei prati stabili', '63 essences from permanent pastures'. It started on May, 5th 2018 with the first official conference, where we presented it.

Tell us something more.

Our goal is to make of Bibbiano and permanent pastures a starting point in the history of Parmigiano Reggiano. In the Enza Valley, 45-50% of the agricultural lands are permanent pastures, while in the area between Parma and Bologna, there is medick. Last year, thanks to the union of the local governments of the Enza Valley, the Agriculture Ministry recognised permanent pastures to be a rural and historic

Quando i prodotti sono Armonie (Alimentari)

La bella storia di un'azienda emiliana a conduzione familiare. Dalla lana di roccia a Parmonie e Parmigiano Reggiano '63 Essenze dei prati stabili'. Un progetto innovativo per raccontare e valorizzare la Dop. E una materia prima eccellente: il latte di vacche alimentate a prati stabili. Intervista a Gabriele Menozzi, amministratore di Armonie Alimentari.

heritage. Therefore, they have to be promoted. Here originates a product which belongs to this land, in all senses.

What is a permanent pasture?

It is a multispecies meadow where self-seeded grass and forage are grown. No weeding is done. It is just irrigated and manured. Then you need to wait the grass to grow. And mowings are given to cattle. During the last years, the region has taken a census of all the meadows: on a square meter, there are 63 different species of grass. So, cattle fed with grass from permanent pastures eat an incredible variety of herbs. Therefore, cows produce a different milk, which provides the cheese a distinctive and aromatic flavour.

That is how the brand '63 essenze dei prati stabili' was born ...

Exactly. We wanted to convey emotions, besides the concept of variety related to permanent pastures, so we created that trademark and registered it. Today, Parmigiano Reggiano '63 Essenze', from May 5th, 2018, is produced mainly with forage from permanent pastures. From spring to fall, grass is mowed and is given to cattle. Cows ruminate, they feel better. So, they live longer and produce more.

What is the difference compared to cattle which are not fed with grass from permanent pastures?

The main difference is the complexity and intensity of the aroma of the final product, the fragrance and taste of Parmigiano Reggiano. Just like good wine hails from vineyards, good Parmigiano Reggiano hails from meadows. Nutrition is fundamental.

As a consequence, milk is better and so is the product, right?

I prefer to say that it is different and that we set it off. Blind tests on the various products, as well as chemical tests on fats (saturated and unsaturated), were carried out and some differences came to light. Then, consumers will make their decision. We, Armonie Alimentari, want to make the most of our project. Retailing is giving us confidence.

What does that mean?

It's all about presenting an authentic product in the right way, at a fair price. It is necessary to place the product on the market, to show its characteristics and define a correct price, also for the producer.

What about the future?

Our goal is to maintain and further enhance what we are achieving at present. So, today's sacrifices will allow us to reap the benefits of our efforts. Many retailers are giving us confidence. I hope they'll keep doing it more and more. Clearly, it is difficult to maintain farmers' confidence too. It is necessary to often visit cheese factories. Farmers should consider us as partners, not only as merchants. We need to create a network with them, which is not easy. We have made it, so far.

Out of curiosity, to conclude. Why did you choose the name 'Armonie Alimentari' (editor's note, 'food harmonies')?

It was a sort of 'work in progress'. At first, we needed to name our Parmigiano snacks. They were and are a harmonious product. So, we chose 'Armonie', 'harmonies'. Adding a 'P', like Parmigiano, we got 'Parmonie'. Armonie Alimentari is the direct consequence.



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MADE IN ITALY IN NUMBERS

THE AGRI-FOOD INDUSTRY WENT UP BY 3.1%. EXCEEDING NATIONAL GDP BY MORE THAN THREE TIMES. BOND WITH THE TERRITORY, CRAFTSMANSHIP AND INNOVATION ARE THE MAIN DRIVERS. THE UNIVERSITY OF POLLENZO'S SURVEY.

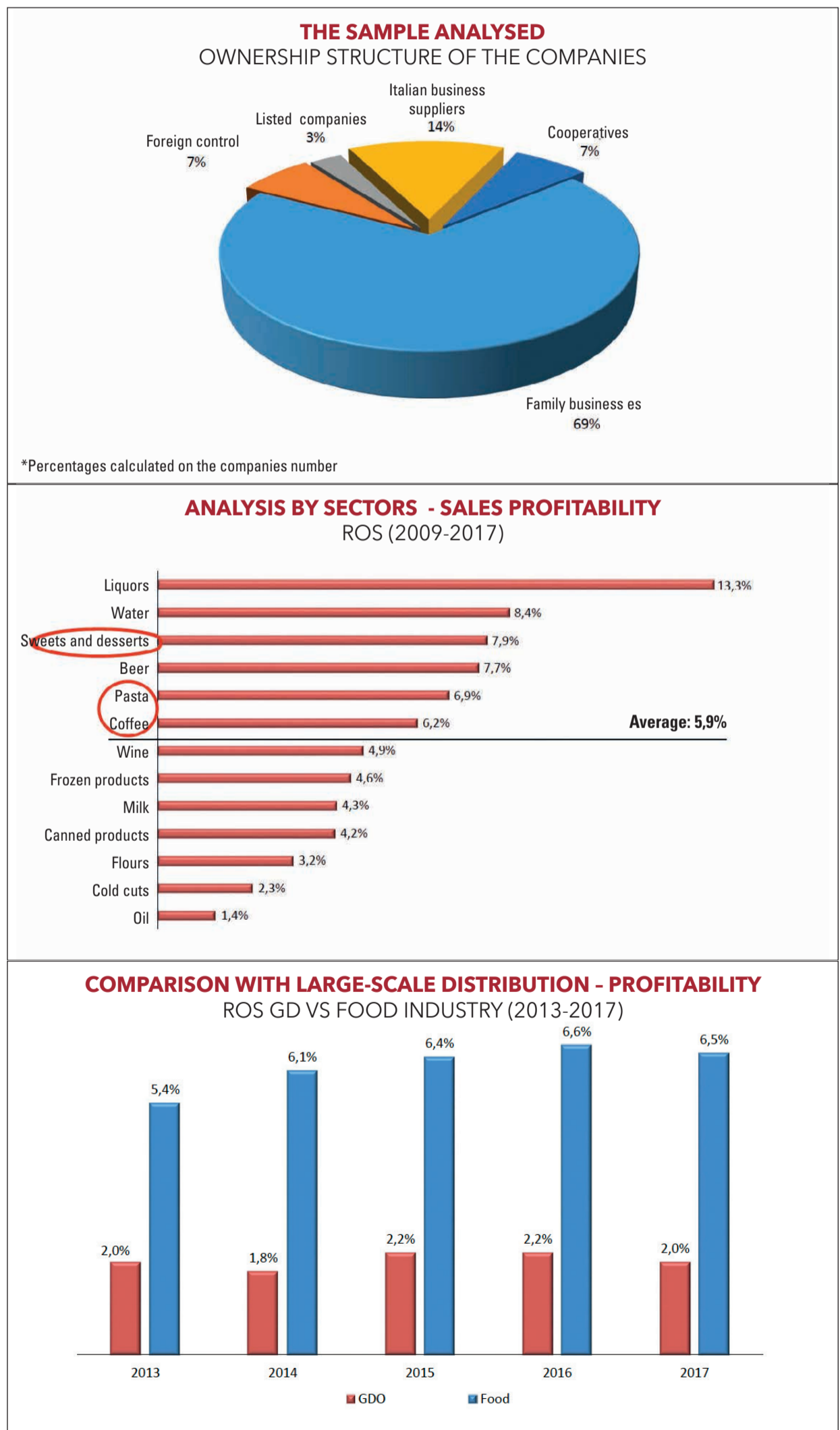
Behind the scenes of the Italian agri-food industry. The Food industry monitor is an observatory - conducted by the University of Gastronomic Sciences of Pollenzo (Unisg), thanks to the support of Ceresio Investors (a Swiss banking group headed by Banca del Ceresio) - which aims at analyzing the performance of the Italian companies in the sector, the medium-term growth and profitability prospects and the determinants of operating profitability, productivity and growth.

The research

The 5th edition of the Monitor presents the economic and competitive data of 823 medium and large companies operating in Italy (for an aggregate turnover of around 63 billion euros), active in 15 sectors (mineral water, beer, coffee, canned products, distillates, sweets, flours, food equipment, milk and derivatives, oil, packaging, pasta, meat products, frozen foods, wine). They account for 71% of the joint-stock companies operating in the Italian food field (chart 1). "It is one of the strongest sectors in the Italian scenario, with many companies able to excel thanks to a strong international inclination", said Alessandro Santini, head of corporate Ceresio Investors, during the data presentation in Pollenzo (Cn), in June. "These companies are currently among the main objectives of private equity funds, the engine of a great part of aggregations, and have excellent growth prospects thanks to mergers, acquisitions and financial support."

The performance

"In 2018 the agri-food sector continues to grow by 3.1%, a value that exceeds the growth of Italian GDP by more than three times", explained Carmine Garzia, relator and speaker at the conference, scientific coordinator of the Observatory and Management teacher at the University of Pollenzo. "The positive trend is set to continue in 2019 and in 2020 at expected rates of around 3% per year". Income performance slowed slightly in 2018 compared to 2017, with prospects of substantial stability over the next two years. The return on investment has a positive trend and in 2019 will return to a double-digit value (10%). The debt ratio continues its downward trend which will continue also in 2020. As for the growth of the various sectors (chart 2), the distillates sector has a historically higher commercial profitability (13.3%), but good performance was also recorded by food equipment (9.6%), of water (8.4%), sweets (7.9%), beer (7.7%), pasta (6.9%) and coffee (6.2%), which are worth more than the sector's average (5.9%). There is a slight recovery in the profitability of the milk sector (4.3%). The segments that grow on the long term (Cagr from 2009 to 2017) are flours, food equipment, frozen foods, coffee,



Source: Carmine Garzia, Food Industry Monitor

Source: Carmine Garzia, Food Industry Monitor

Source: MBRES, 2019



Tutti i numeri del food made in Italy

L'agroalimentare italiano cresce del 3,1%. Superando di oltre tre volte il Pil nazionale. Legame col territorio, artigianalità e innovazione i principali driver. L'analisi condotta dall'Università di scienze gastronomiche di Pollenzo (Unisg), grazie al supporto di Ceresio Investors (gruppo bancario svizzero che fa capo a Banca del Ceresio) – che ha l'obiettivo di analizzare le performance delle aziende italiane del settore, le prospettive di crescita e redditività di medio periodo e le determinanti della redditività operativa, della produttività e della crescita.

oil, packaging and wine. "We continue to observe the development of interesting niche strategies in some typically strong sectors", specified Carmine Garzia. "It is the oil case, where some medium-sized producers have invested in branding and communication, focusing on market niches and premium prices based on perceived quality. We record a similar trend in the flour sector, where medium-sized companies and some large players have focused on products with innovative characteristics for specific uses, such as domestic production of special bread and pizzas". Another interesting sector is packaging. "One of the main drivers of innovation in food for several reasons: consumption habits and formats have changed, often more compact and resistant. Formulations, shelf life and packaging have changed. Finally, the challenge to create low environmental impact packaging is underway".

Sustainable growth rate

The UNISG analysis shows that only four sectors have a satisfactory sustainable growth rate. The value has been calculated taking into account the increase in revenues, commercial margins and the financial structure over a multi-year period (2009-2018). The higher the index, the greater the chances to grow. In particular, according to the three profiles, the sectors that recorded the best performances are: coffee, food equipment, distillates, flours and wine. Sectors such as pasta, frozen foods, packaging, and water occupy (...)

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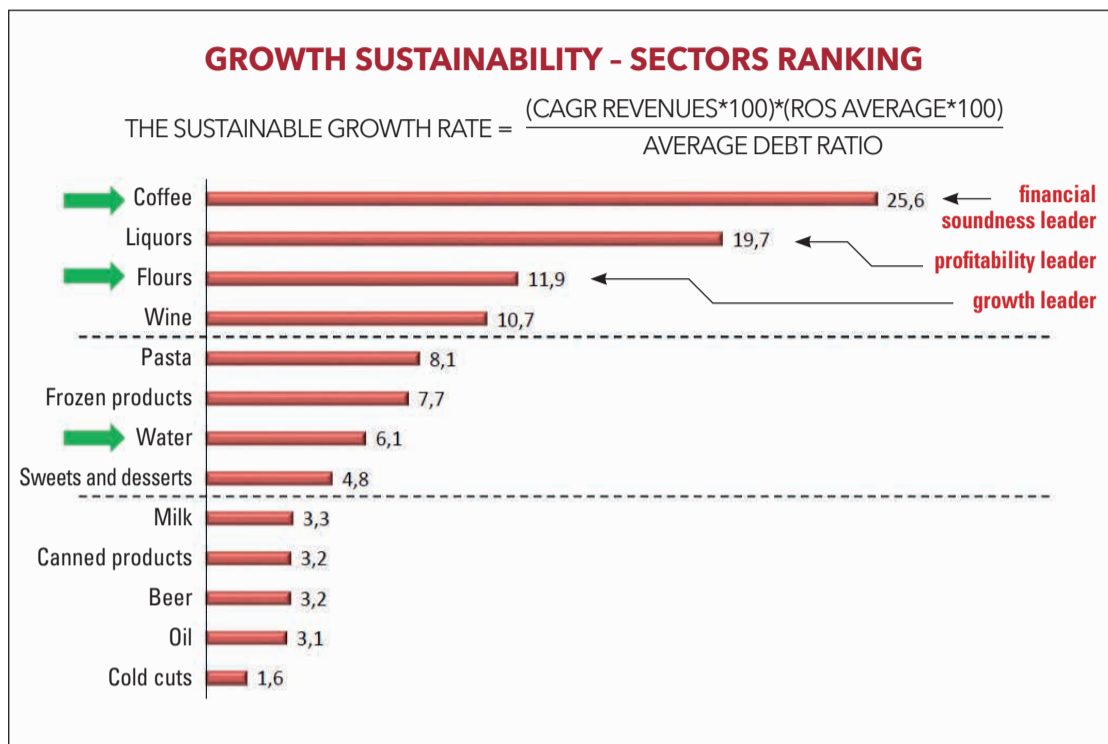


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THE DIFFERENCE

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(...) intermediate positions as they do not stand out in all the three profiles. Perspectives are less positive for compartments such as cured meats, oil and milk.

The strength of tradition

The analysis shows how food companies that focus on craftsmanship have grown in the last 10 years much more than the average of companies that have not made the same choice. Bond with the territory, craftsmanship and innovation in production processes are the main determinants of profitable growth for companies in the sector. The study confirms that craftsmanship helps to develop original products, sold with a premium price. According to the Observatory, the analysis of the business model show that 70% of companies believe they are very tradition-oriented. Innovation focuses on processes, which maintain a strong artisan base and which are reviewed and optimized for industrial production. For almost the entire sample (93%) the selection of raw materials is fundamental for the production process. 69% of the companies have artisan or peasant suppliers. 68% of them apply to local suppliers by keeping long-lasting relationships, supporting their development. Also the analysis of the communication strategies of companies shows that, for the valorisation of its products on the market, 75% of the Italian companies rely on the link with Italian tradition and 54% of companies on the Designations of origin and / or on Slow Food presidia. 46% of companies make use of themes that recall craftsmanship. For 63% of the sample, the communication strategy is in line with the most recent health trends.

A comparison of the food industry with other sectors

The Observatory compares the food industry with other sectors and with the large-scale distribution (chart 3). The first analysis compares the performance of growth, profitability and financial structure of large companies (with turnover above 100 million euros) with those of medium-sized companies (between 100 and 50 million euros). There was a clear improvement in the growth rate of the averages and income performances higher than those of the big companies. Profitability is higher for medium-sized companies with very high values in the sectors: distillates (15.4%), sweets (8.5%) and pasta (8.0%). Wine, coffee, salami and oil are more profitable mainly for large businesses companies, respectively: 8.2%, 7.3%, 2.6%, 2.2%. Important brands grow at higher rates only in the sectors in which trading companies' business model is prevalent, such as for oil and wine. As for the intersectoral comparison, the food sector shows a slight deterioration in the performance. In fact, it emerges that the return on invested capital in 2017 is lower (9.8%) than that of different sectors of the Italian economy such as clothing or mechanics (comparison with Mbres data). Considering the debt ratio evolution of the Mbres sample of Italian companies, even in food there is a downward trend in the long term. 2018 marks the lowest level (2.30) of the debt ratio for the entire period considered (2010-2018).

Forecasts

Forecasts of the 5th edition of the FIM analyse growth, profitability and financial structure of companies operating in the food sector. For the 2019-2020 period by making use of different statistical models. As for the field's turnover, over the next two years, a 5.9% cumulative growth is expected. The debt ratio will decrease, confirming the solidity of companies in the sector. In fact, exports will go up over the next two years (+ 6.7%), especially in the water, cured meat, beer and coffee sectors. The pasta, canned products, food equipment and flour sectors will record worst performances.

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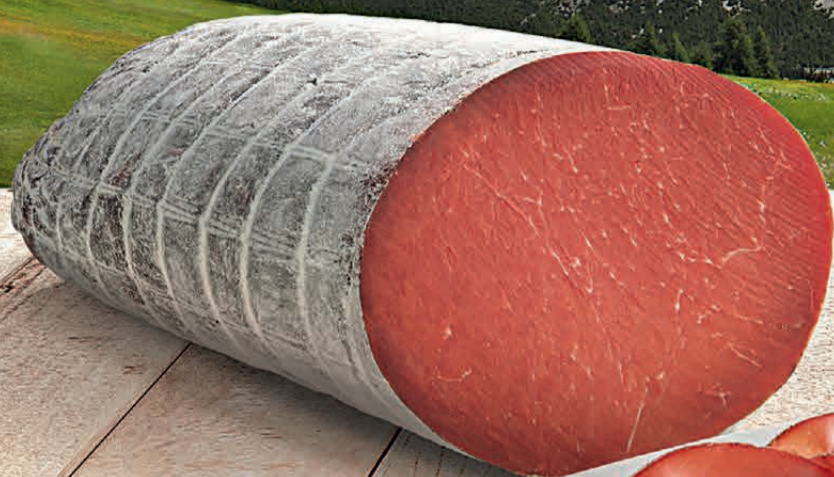
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HEALTHY AND FAST: THAT'S HOW JAPANESE EAT

THE FOOD PROCESSING INDUSTRY IN THE LAND OF THE RISING SUN KEEPS GROWING. AND IT IS ORIENTED TO A TWO-DIRECTIONS PATH. A SURVEY BY THE USDA REVEALS HOW TO ENTER THE MARKET AND THE MAIN EXPORTERS.

Health-oriented products. Frozen foods. Ready-to-eat meals. This is what Japanese consumers demand the food-processing sector, which doesn't stop evolving. On the one hand, they are more and more interested in health and functional foods, in the attempt of having a diversified diet. And they are concerned with food safety. On the other hand, changing lifestyle and habits have brought to an increasing demand for pre-prepared foods. The findings of a survey carried out by the Usda's Foreign Agricultural Service (Fas) of the United States in the past February.

Overall market trends

The Japanese food processing industry has gone up from 211.5 billion dollars in 2017 to 216.8 billion dollars in 2018. And it is oriented to a two-directions path. Producers need to maintain market share with traditional product lines. At the same time, they are always developing creative products to attract new consumers who are interested in innovative foods. That is the reason why they make a wide variety of products, including traditional Japanese foods, Western foods and health-oriented foods for infants and elderly.

Processed foods that are increasing in popularity include yogurt, meat, soups and ramen. While frozen foods consumption has doubled over the past two decades and continues to grow. In addition, as consumers are cooking fewer meals at home, new trends in terms of ready-to-eat products are setting. For example, population demands small-sized packages

that can be finished in one sitting and the so-called 'pre-mixes' – 'prepared mix' - are catching on. Yet, as 70% of the population prefer to live a healthy lifestyle, salad chicken (ready-to-eat chicken breast packed in a small portion), namazake (a traditional sweet fermented rice drink), tomato drinks, and rice snacks are the top growing domestic processed foods. No surprise that 'low-calorie', 'low-fat',

'high-protein' and 'sugar-free' are some of the most common claims on food packaging.

Entering the Japanese market

Conquering the Japanese market is not easy. Regulations on ingredients and additives are very strict. And it is common that the local government requests specific information on product handling and composition. In

Veloce e salutare: così mangiano i giapponesi
Il settore della lavorazione degli alimenti continua a crescere. E segue un percorso a due direzioni: mantenere le quote di mercato con linee di prodotti tradizionali e sviluppare referenze innovative per attirare giovani consumatori. Per soddisfare la necessità di avere cibi che siano facili e veloci da preparare e consumare, e, al tempo stesso, salutarli. Una ricerca del Foreign Agricultural Service, l'ufficio per le relazioni estere della Usda statunitense, rivela come entrare nel mercato e quali sono i principali esportatori nel Paese del Sol Levante.



In addition, local manufacturers require very high standards in terms of quality and consistency. As a consequence, exporters must ensure that products are permitted on the Japanese market. Anyway, the Land of the rising sun has enormous potential. And trade shows are the place to go if a producer wants to export in Japan. In fact, buyers in the food and beverage industry often prefer to find new pro-

ducts there, where they can look at many all at once.

Exporters in Japan

The United States are Japan's main agricultural trading partner, having 25.7% of the market share. Yet, recently, many other actors have come on stage thanks to new free trade agreements that reduce or eliminate food and agricultural tariffs: the Trans-Pacific Part-

nership and the Eu-Japan free trade agreement. The European Union, Canada, Australia, Chile and Mexico are among the exporters. In further details, the United States are the leading supplier of fresh pork and beef, and soybean. While the Eu, New Zealand and Australia mainly export cheeses. Finally, China is the second larger fruit and vegetables exporter in Japan, competing with the United States.

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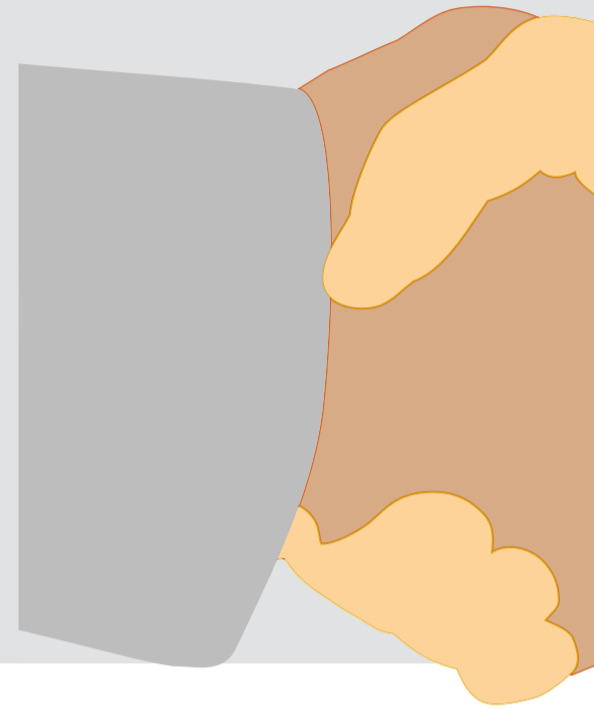
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No barriers. No protectionism. The economic partnership agreement between the European Union and Japan, which entered into force on February 1st, 2019, helps the two countries shaping global trade rules in line with high standards and shared values. By removing over 90% of duties on exports. In addition, 205 Pgi agricultural products are protected and exporting services is now much easier. Eu firms already exported to Japan over 58 billion euros in goods and 28 billion euros in services every year. Thanks to the partnership, they will be able to save 1 billion euros. While, as far as



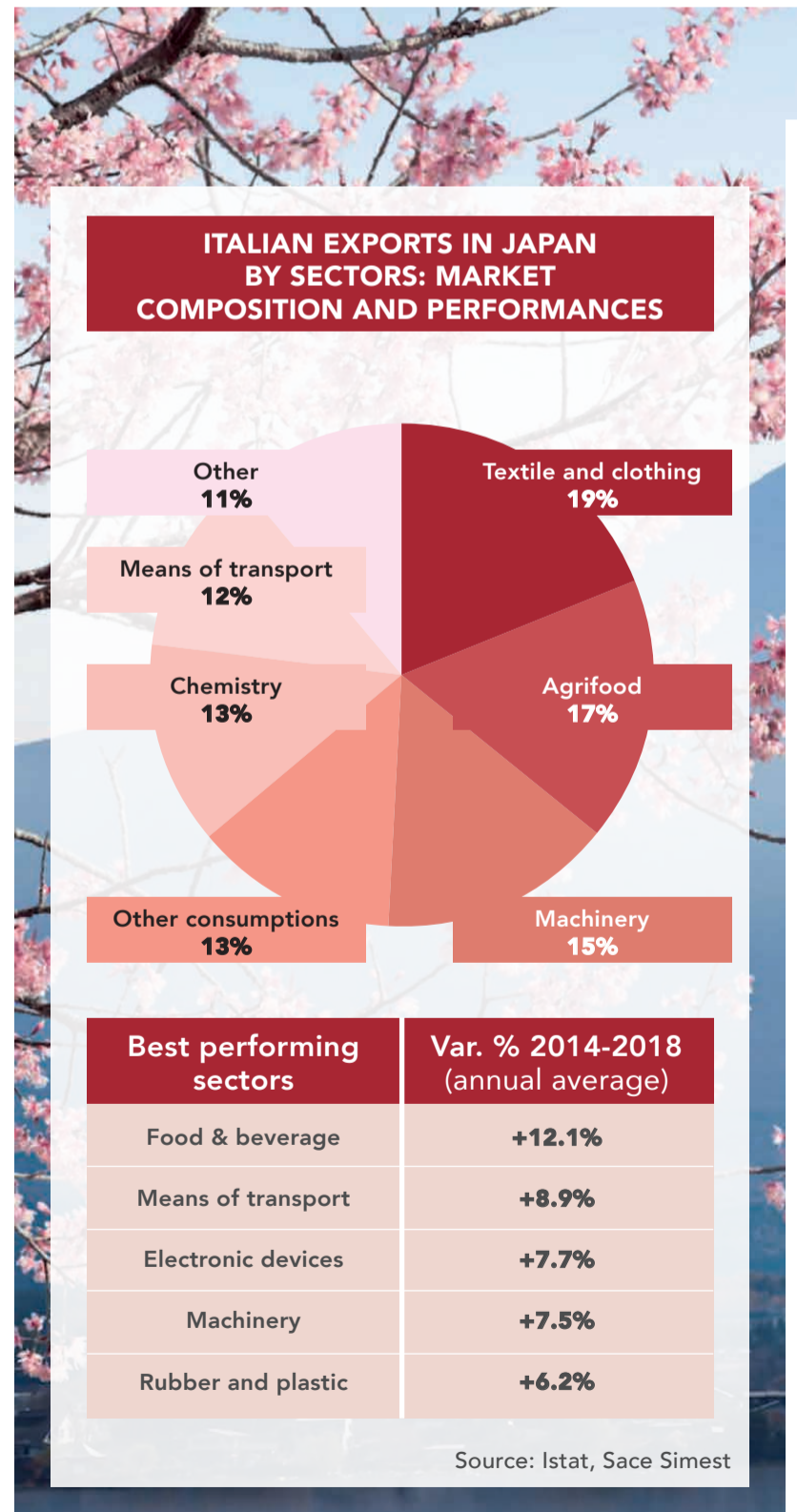
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NEW OPPORTUNITIES

made in Italy is concerned, in 2019, Italian exports have gone up by over 17%, equal to 3.6 billion euros, according to a survey carried out by Sace Simest, that specialises in supporting Italian companies which want to grow on the global market. In further detail, food and beverage imports from Italy rank second among the fastest growing sectors: +47,4%. And, the Japanese customs administration has revealed that, in July, imports from Italy increased by 11.3%. According to Sace Simest, sales volume of made in Italy products will reach 6.7 billion euros within the end of the year.



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COUNTRY INSIGHT

TRADE SHOWS: WHERE BUYERS GO



FoodEx Japan

When: March 10th – 13rd, 2020
Where: Makuari Messe, Chiba (Japan)

FoodEx is the Asia's largest exhibition dedicated to food and beverage and is a true gateway to Asian markets. In 2020, the 45th edition of the fair will be held. And 85 thousand buyers from food service, distribution, and trading companies are expected to attend the event over the four days. Also buyers from abroad will be taking part. In 2020, attention will be given to the expansion of business opportunities domestically and internationally upon the activation of the Trans-Pacific Partnership.



Supermarket trade show

When: February 12th – 14th, 2020
Where: Makuari Messe, Chiba (Japan)

The Supermarket trade show is part of the 'Food table in Japan' exhibition: the starting point for food business, together with the 'Delicatessen trade show', the 'Kodawari food fair' and the 'Gais-hoku food table'. It focuses on supermarkets. And offers the latest information on the food distribution industry and gives visitors - who are mainly supermarkets and retailers, food trading firms and wholesalers, and food manufacturers - the opportunity to meet and find new partnerships, networks and trends. In 2019, over 88 thousand people visited the show, where 2.176 exhibitors were present, making the Supermarket trade show one of the biggest exhibitions in Japan.

MARKET STRUCTURE

How imported product tend to enter and move through the traditional Japanese distribution system:

INGREDIENT PRODUCTS WILL MOST LIKELY BE HANDLED BY A:

- 1**
GENERAL TRADING COMPANY
- 2**
FIRST-LINE WHOLESALER
- 3**
SECOND-LINE WHOLESALER
- 4**
FOOD PROCESSOR

TRADING COMPANIES PLAY THE FOLLOWING SERVICES:

- 1**
IMPORT PROCESSING
- 2**
FINANCING
- 3**
CUSTOMS CLEARANCE
- 4**
WAREHOUSING
- 5**
PREPARATION OF ORDER AND SHIPPING DOCUMENTATION

Large food processors and retailers are increasingly purchasing sizeable quantities of product directly from trading companies.

Source: Japan - Food Processing Ingredients - Japan Food Processing Sector Annual Report (Usda)

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il buon cioccolato
the good chocolate

TOP GROWTH SECTORS

BEEF & BEEF PRODUCTS



Beef and Beef Products

Demand for U.S. lean beef and products continues to increase, mainly through the food service and restaurant channels. This longstanding growth can be attributed in part to Japan's aging population and single-person households, coupled with health conscious attitudes. U.S. lean beef lends itself to larger portion sizes when compared to traditional highly marbled Japanese beef. New and existing restaurant chains that feature U.S. beef are expanding rapidly as overall beef consumption continues to climb.

FISH PRODUCTS



Fish Products

Japan has the highest rate of seafood consumption in the world, and at \$14.9 billion in 2018 is the second largest importer. Shrimp, tuna, salmon, and squid are the top imports. Japan is the third largest export market for the United States, valued at \$843 million in 2018. The top U.S. export is Alaskan Pollock (Surimi), followed by roe and sockeye salmon. The United States is not a major supplier of shrimp or tuna. Other major seafood suppliers are China, Russia, Chile, Vietnam, Thailand, and Norway.

PROCESSED VEGETABLES



Processed Vegetables

After China, the United States is the second largest supplier of processed vegetables, with roughly 20 percent of the import market share in volume. The United States is a major supplier of prepared potatoes, tomato paste, and prepared sweet corn. Higher consumption of home-meal replacements is expected, which will bolster producer demand for processed vegetables.

TREE NUTS



Tree Nuts & Peanuts

U.S. tree nuts are increasing in popularity in the convenience health snack sector, as detailed in the Tree Nuts Market Overview. Almonds, walnuts, pecans, and peanuts, in plain, roasted and salted forms, are common in single-serve snack packaging at convenience stores across Japan. These serve the large fast-paced health conscious working population. In addition, candy - and/or chocolate-coated tree nuts snacks continue increasing both sales and the scope of new product offerings. The Japanese food service industry is beginning to explore new salad creations, many of which incorporate tree nuts.

WINE AND BEER



Wine and Craft Beer

Recently, the Tokyo ATO published a Wine Market Overview and a Craft Beer Market Overview. Since publishing, U.S. Census Bureau Trade Data was released for 2018 showing that U.S. premium wines and craft beer are continuing to gain sales. Last year, total U.S. wine exports to Japan reached \$91.2 million, up slightly from \$90.8 million in 2017, while total beer exports came to \$11.0 million, a one-year increase of 74 percent.

PEANUTS



DISTILLED SPIRITS



DRIED FRUIT



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Lamb and Lamb Products

The U.S. recently gained access for lamb and lamb products after a 14-year absence from the market. As a result, U.S. lamb and lamb products are expected to see growth in the coming year among high-end hotels and restaurants. For more details, read Japan Reopens Market to U.S. Lamb.

Source: Japan - Food Processing Ingredients - Japan Food Processing Sector Annual Report (Usda)



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ONCE UPON A TIME IN RUSSIA

A HUGE MARKET, WHERE MADE IN ITALY IS PROTAGONIST, FROM FOOD TO FASHION. YET, BORDERS ARE STILL CLOSED, FROM 2014, DUE TO THE FREEZE ON IMPORTS FOLLOWING THE UKRAINIAN CRISIS. A GREAT OPPORTUNITY FOR THE AGRI-FOOD INDUSTRY, THAT WAS MISSED AND MAY NOT RETURN.



Winston Churchill called it "a riddle, wrapped in a mystery, inside an enigma". Actually, in Russia, not only territories are infinite, so is the number of mysterious and unpredictable things. The Country is undoubtedly different from the common stereotype we often have in Europe. But it is also extremely different from one city, or even neighbourhood, to the other. One thing is clear, instead: made in Italy is extremely appealing for Russian consumers, who love Italian food, music, lifestyle and fashion. Visiting the two 'capital cities', Saint Petersburg and Moscow, means making a trip between two opposite ways of being Russian and two utterly different cities. The first is more Europe-oriented; the second, Moscow, represents the authentic Russian spirit. But some people say that none of them truly embodies Russians' nature, the character of the people living in the boundless plains of the Great Mother, which stretch from west to Asia and the North Pole. Saint Petersburg is the easiest city to visit for

Europeans. In fact, since its foundation and in its palaces' architecture, mainly designed by Italian architects, Peter - as it is affectionately called by its residents - represents Russians' desire for Europe. The tsars' love for the European beauty, art and lifestyle. And when visiting the Ermitage, you can perceive their passion for Europe. Here, thousands of masterpieces of the greatest artists of all times are shown - many of them are Italian. But, as it has often happened, they were not stolen during wars. On the contrary, they are the result of painstaking and meticulous research of tsars and Russian patrons. With no doubts, Moscow is a more difficult city: everything is huge, there is twice the population of Saint Petersburg, it is so large that it can take even three hours by train or underground to move from the suburbs to the city centre. Also its inhabitants are less relaxed than in Peter. What about food? Russia is for sure one of the best countries to taste different cuisines and the most varied foods. The choice is un-

*“Russia cannot be understood with the mind alone,
No ordinary yardstick can span her greatness:
She stands alone, unique –
In Russia, one can only believe”.*

Fëdor Ivanovič Tjutčev, Russian writer and poet



bounded. Just like Russians' passion for food. And you can eat and drink anything at anytime, all day and night long. Surely, the number of signs recalling made in Italy and our cuisine leaps out. No matter how authentic it is. Including a restaurant of the British chef Jamie Oliver, who is still shining here, contrary to the Uk, with its interpretation of the Italian cuisine. When visiting Russia, it is even clearer what an opportunity it may have been for made in Italy. Due to the freeze on imports, that started back in 2014, as a reaction towards the Eu sanctions for the Ukrainian case. A missed opportunity that today is even more significant as, after a period of crisis, consumption in Russia has started increasing again. And only Moscow and Saint Petersburg, which are wealthy markets, reach over 20 million inhabitants. One third of the Italian, French and British population, just to make some examples.

“Bread and pasta are better. Even if Italian brands ...”

My guide, in Moscow,

is a strict Italian teacher, who was born before the Perestrojka. She has a terrible memory of that period. When she used to go to the supermarket with her mother and found empty shelves, with just one roll of toilet paper and an anchovies jar. Irina – that's her name – explains to me that before imports were stopped, she used to buy many Italian products. Especially promotion goods, because of their prices. Anyway, she tells that Russia is growing, in particular in terms of products' quality. “We'll be self-sufficient in the future. But, Italian pasta doesn't overcook ...”, she says while smiling. She has an in-depth knowledge agricultural themes, which isn't surprising in Russia, where self-sufficiency is a heartfelt topic and a reason of national pride.

Shopping lovers: malls and food courts

Russians love shopping, tasting, spending many hours in shopping malls looking at displays in shop windows. In general, Russians are very prone to consuming, especially food. (...)

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C'era una volta in Russia

Un enorme mercato, dove l'Italia è protagonista, dall'alimentare alla moda. Ma le frontiere sono ancora chiuse, dal 2014, per il blocco delle importazioni a seguito della crisi ucraina. Una grande opportunità persa per il made in Italy. Che potrebbe non tornare più.

(...) And shopping districts are considered as real gathering spaces, also because of their beauty, huge dimensions and wide food offer. In some cases, malls are located in historical buildings, such as Gum in the Red Square, which is characterised by a spectacular roofing in glass and steel. Built back in 1893, it was the first covered shopping gallery in Russia and, since its inauguration, it has always been one of the most fashionable places in Moscow. Here, all luxury brands in the world, from Italian to French labels, are sold at very expensive prices compared to Europe. But is also possible to eat caviar and many other Russian delicatessens, included the renowned ice-cream. Which is venerated. And, ready-prepared, is served on a wafer cup. In fact, all shopping malls have enormous food courts, where, besides fast foods, self-service restaurants and Russian restaurants, there's a wide offer varying from sushi to typical Siberian dishes.

products can be found. Meat, fish and cheese are absolute protagonists in the different regional Russian cuisines and in restaurants. That is why explicit advertisements on animal proteins can be found here and there. Such a thing, in the European Union, may cause controversies and rabid debates. Like McDonald's, that, for launching the new chicken burger, has drawn, under the hamburger, chicken feet, in case it wasn't clear enough that it is made of meat from an animal that was bred and slaughtered.

Mad for made in Italy: from cappuccino to gorgonzola marshmallows

In Moscow, a half of the restaurants recall Italy: in the sign or the dishes, hard not to find references to the mediterranean Country. In coffee bars, where thousands of coffee variations, served with bakery products, are available, the most frequently pronounced word - and the most frequently drunk product - is cappuccino. Clearly, for Italians, it is not a proper cappuccino: too much milk. But it shows how much Russians are passionate about Italy. Names of Italian products are often used to describe recipes and give them an international and refined touch. So, grana and parmesan rule the roost in many menus and, during the cruise to the Finland Gulf, (awful) gorgonzola marshmallows are served: hot sponges with an indefinite taste, that vaguely recall the noblest Italian blue-veined Pdo cheese. Italy is everywhere, despite its product are blocked at the frontiers.

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WHAT AN ORGANIC

A NEW GLOBAL SALES RECORD FOR THE AREA. THAT CROSSES THE FATEFUL THRESHOLD OF 100 BILLION DOLLARS IN THE FOOD & BEVERAGE SECTOR. WHILE THE GROWTH TREND SEEMS NOT TO SLOW DOWN.

The 'organic rush' keeps growing. And markets all over the world attest this as unquestionably true, by reaching new records in 2018. As for food & beverage, the threshold of 100 billion dollars has been knocked down and the global turnover increased by 6% in the previous 12 months. To be precise, as reported by Ecovia Intelligence, the turnover for organic food and agriculture reached 105 billion dollars worldwide, with the most significant contribution coming from North America and Europe, which are now worth 90% of global sales combined. However, it is noteworthy that, even if the business pace it's still set by the Western Countries, since 2005 their impact has reduced by 7%. This happened also because some Countries, such as China, India or Brazil, started to gain importance. Over the years they developed a strong export tradition of organic products and now they also began generating a strong consumption over their national territory.

rica and Europe, which are now worth 90% of global sales combined. However, it is noteworthy that, even if the business pace it's still set by the Western Countries, since 2005 their impact has reduced by 7%. This happened also because some Countries, such as China, India or Brazil, started to gain importance. Over the years they developed a strong export tradition of organic products and now they also began generating a strong consumption over their national territory.

Un altro anno da bio

Cresce la febbre del bio. A certificarlo, in maniera inconfutabile, i mercati di tutto il mondo. Che nel 2018 hanno fatto segnare nuovi numeri record. Abbattuta, nel food & beverage, la fatidica soglia dei 105 miliardi di dollari, con il giro d'affari globale a compiere un passo in avanti del 6% sui 12 mesi precedenti. Nord America ed Europa restano i paesi ad aver contribuito in maniera preponderante al risultato, con il 90% delle vendite. Tuttavia, si osserva l'emergere di alcuni Paesi, come Cina, India o Brasile, che dopo aver sviluppato nel corso degli anni una forte tradizione nell'export di prodotti bio, ora cominciano a generare anche solidi consumi in ambito nazionale.

Great Britain: growth comes from a better service

Organic market grew in 2018 for the eighth year in a row in Great Britain. And is now worth 2.3 billion pounds, after recording an increase of +5.3% in the last 12 months in comparison with 2017 (source: Soil Association). 1.5% of food & beverage traded in the UK is organic, and the sale target for the sector is expected to reach about 2.5 billion pounds in 2020. The biggest contribution to growth over the last year - but probably also in the future - came from home delivery, that has grown by 14.2% and whose turnover now represents over 320 million pounds. 14% of the whole sector, in percentage terms. Home delivery is expected to be the most dynamic channel from now until 2023. And if Mass-market retailers keep leading the field in terms of business (+3.3% in 2018, with sales over 1.5 billion pounds), home delivery will soon be worth a quarter of the whole organic market. Good results also for the stores that sell only organic products, which were able to confirm their market share (stable at 16.3%), thanks to a 6.2% growth in the previous 12 months. Among the products that produced the best performances last year, milk and dairy, ready meals and canned goods, beer, wine and spirits. On the contrary, baby food, bakery products and sweets signed a decrease in sales.

France: operation overtaking...

In the previous 12 months, France signed a record increase in sales of organic products. Confirming the growth trend that characterized the transalpine market in the last year. In figures, organic food consumption registered a strong 15% increase in 2018, that brought the sector turnover to 9.7 billion euros (source: Agence Bio). And now that 5% of foods purchased by the French is represented by organic products, Germany, the most important European market for the sector, seems no more unreachable. Mass-market retailers qualify as the first sale channel in France too, with a 49% share of the total business. The other part is represented by specialty stores, the second channel for organic products with 34% of the market share, followed by direct selling (12%) and the combination of normal trade and food service (5%). Grocery represents a 23% share of the total amount of organic food purchased, ranking first per product category. Followed by fruit and legumes (19%), dairy products and eggs (17%), spirits (12%) and meat (10%), in the ranking products most bought by the French.

Rises and falls: Us leading more than ever

Us confirms itself as the most important market for organic products in the world. In 2018, according to a research carried out by Organic Trade Association, the sales for the organic sector in the United States reached 52.5 billion dollars, with a 6.3% increase over 2017. Food and non-food sectors both benefited from the increase; the first one registered a turnover of 47.9 billion dollars (+5.9% over the last 12 months) and the second one reached 46 billion dollars (+10.6%). 5.7% of food sold in the Us is organic. Fruits and vegetables get the lion's share, with a business amount of more than 17.4 billion dollars in 2018 (+5.6% on 2017) and 36.3% of the total sales of organic food in the Country. Followed by dairy products and eggs, that in the Us reach 6.5 billion dollars combined (+0.8% on 2017).

Spain keeps a fast pace

In 2018 Spain confirmed the positive trend that brought the Country among the top 10 markets for organic products worldwide and gained more than 12 percentage points on 2017 (source: EcoLogical). Not only grew the turnover on a national scale, reaching 1.686 billion euros, but also the amount of money spent per capita, that exceeded 36 euros per year. While organic products gained a more considerable share of the global sales in food industry (now at 1.69% of the market), according to the previous data, the organic sector is expected to reach a turnover of 2 billion euros by the end of 2019.



WORLD



Scandinavia ebbs and flows

The turnover generated by organic products in Sweden is just a bit higher than in Denmark, and in the previous 12 months the sector gained 28.8 billion Swedish kronor (more than 2.7 billion euros), a 4% increase on 2017 (source: Ekoweb). In Stockholm and outskirts, organic products were expected to represent more than 10% of the global food & beverage purchases, but instead the results narrowly missed a double-digit percentage, stopping at 9.6%. This highlights a slowdown in the organic sector of the Country and now the 2019-2028 growth forecast has been downsized to one billion Swedish kronor per year (about 95 million euros), instead of the two billion previously expected. Norway obtained significantly positive results, even if the amount of organic products purchased is way smaller: in 2017 the sector increased by 8% and sales reached 300 million euros during the last 12 months (source: Landbruksdirektoratet). Organic products in Finland have similar results, with a turnover that was slightly bigger than the Norwegian one in 2018: in 2017 the Finnish market increased by 9% and is now worth 336 million euros, which translates into a 2.4% share of the global food sector of the Country (source: Pro Luomu).

Denmark is greener than ever

After leaving the first place in the ranking for purchases per capita to Switzerland (288 vs 278 euros), organic products in Denmark keep obtaining astonishing results. In 2018 the sector increased by 14% in comparison with the previous year (source: Organic Denmark), with 51.4% of the Danish buying organic foods every week. In fact, the sector represents now 11.5% of the global food sales. Among the most purchased products in Denmark there are carrots, oat, yoghurt, oil and milk. And the business in 2018 was worth over 16 billion Danish kroner (more than 2.14 billion euros).

Russia: 2025 is on the horizon

Organic products in Russia are worth 160 million euros. 20% of the turnover comes directly from the inner production, according to the Russian organic association (Nos). While the largest exporters for the Country are France, Germany and Italy. However, the 2018 data, released by the Moscow office of Ita-Ice, does not depict a comprehensive overview of the sector. As a matter of fact, according to the Russian union for organic agriculture (Soz), the turnover could increase up to 235 million euros in 2020, when the law on the organic market is expected to be put into effect. And the ministry of Agriculture plans to reach a 5 billion euros turnover by 2025, "considering the potential of the fallow land, the considerable water resources, the increasing use of technology and the growth of demand".



Germany leads Europe

In Europe, Germany still represents a landmark for the organic market. In 2018 the turnover of the Country in this sector was equivalent to 10.91 billion euros, with a 5.5% increase compared to 2017 (source: Ami). The first sale channel is still represented by Mass-market retailers (6.43 billion euros, +8.6% on 2017), followed by specialty stores (2.93 billion euros, +0.8%) and a mix of normal trade, farmers' markets and online retail (1.55 billion euros, +2.4%). Now organic products in Germany represent almost 5.3% of the business. In the last 12 months the best growth results came from the sales of flours (+10.3% in volume and +12.5% in value on 2017), eggs (respectively +2.7% in volume and +6.7% in value), milk (+6.4% and +5.8%), red meat (+08% and +4%), cheese (+6.8% and +3.3%) and vegetable oils (+6.7% and +2.7%). If in 2018 the amount of purchased organic vegetables was, more or less, the same of the previous year, fruits and bread suffered a real debacle, with a 6-percentage points loss in volume on 2017.



Switzerland has the biggest consumption per person

Every year, more and more Swiss choose to buy organic products. As a matter of fact, 56% of them now buy organic foods once a week or more (source: Bio Suisse). Not only: Switzerland is also the Country with the biggest per capita purchases, because they spend 360 Swiss francs per year (over 288 euros). So is no coincidence that in 2018 the Swiss organic sector was worth more than 3 billion euros, with a 13.3% growth of the turnover in the last 12 months, that translates into a 9.9% share of the global food market of the Country. Every category of products has recorded an increase in Switzerland. At the first place in the ranking there are still eggs, followed by fresh bread and vegetables, salad and potatoes.

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A GLIMPSE ON VINES AND WINES

A REPORT ON THE GLOBAL VITIVINICULTURE SITUATION: PRODUCTION AND CONSUMPTION, IMPORT AND EXPORT VOLUMES. THE MAIN DATA RELATED TO 2018.

During the 42nd World Congress of Vine and Wine in Geneva, Switzerland, Pau Roca, General Director of the OIV, the International Organization of Vine and Wine, presented the 2018 balance sheet of the world wine situation. An important tool to understand how the international vine and wine market evolves, and an overview on the vitivinicultural sector. The report covers the areas under vines, grape production, wine production and consumption, as well as wine import and export volumes. The balance showed that in 2018 the world's wine-growing area represents 7.4 million of hectares; the global grape production reaches 78 million of tons; the world wine production (excluding juice and must) is estimated at 292 million of hectoliters, the world wine consumption is estimated at 246 million of hectoliters and the world wine trade accounts for 108 million of hectoliters in volume and 31 billion euros in value. The different sections in this report are focused on presenting the rate of production and consumption, as well as the degree of balance between these sectors in the wine market. Coming up a glimpse on the world vitiviniculture situation with the main data in 2018.

Increase in the vineyard area

The size of the global vineyard area (regardless of the final destination of the grapes and including vines not yet in production) in 2018

reached 7.4 million of hectares and is slightly higher than in 2017 (+24 thousand of hectares). Spain remains the leading country for area cultivated with 969 thousands of hectares, ahead of China (875 thousands of hectares) and France (793 thousands of hectares). The Chinese winegrowing area continues to increase (+10 thousands of hectares between 2017 and 2018). On the other hand, the European Union's vineyards seem to have curbed their rate of decline and stood at 3.324 thousands of hectares in 2018 (+10 thousands of hectares /2017).

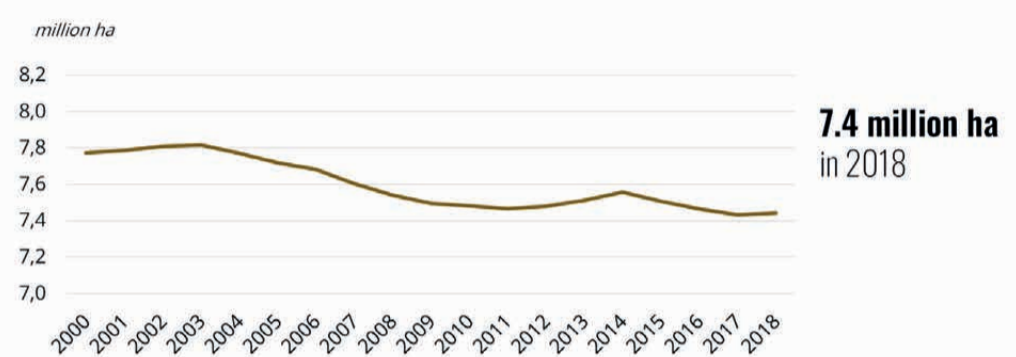
Increase in grape production

In 2018, the global production of fresh grapes (grapes intended for all types of use) reached almost 78 million of tons. Since 2000, the grape production trend has been on the rise (+1% per year), despite the decrease in the vineyard area (-3% over the same period). This is mainly due to a rise in yields resulting from the continuous improvement of vinicultural techniques in China. Despite an 11% drop in production in 2018 the country was the world's leading producer with 11.7 million of tons (15% of global grape production), followed by Italy (8.6 million of tons), the USA (6.9 million of tons), Spain (6.9 million of tons) and France (5.5 million of tons). The top three European producers recorded a 28% increase in production.

A historical wine production

Global wine production

WORLD AREA UNDER VINES



Decrease of the global area under vines since 2014, mainly driven by the decline of the vineyard area in Turkey, Iran and Portugal

In 2018 the world vineyard increases its surface of 24000 ha (+0,3% / 2017)

*Vineyards destined for the production of all types of grapes, and including both bearing and non-bearing areas.

Sources: OIV, FAO

Main vineyards *

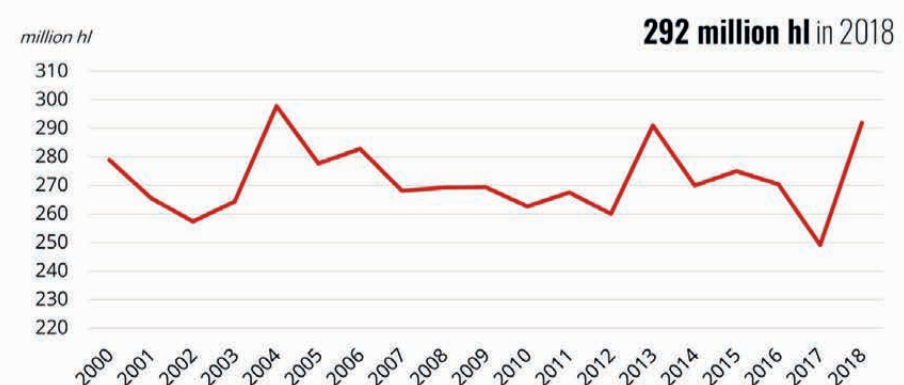
thousand ha	2014	2015	2016	2017	2018	2018/2014 Variation in volume	2018/2014 Variation in %
Spain	975	974	975	968	969	-6	-1%
China	813	847	858	865	875	62	8%
France	789	785	786	788	793	4	0%
Italy	690	685	693	699	705	15	2%
Turkey	502	497	468	448	448	-54	-11%
USA	450	446	439	434	439	-11	-2%
Argentina	228	225	224	222	218	-9	-4%
Chile	213	214	214	213	212	-1	0%
Portugal	224	204	195	194	192	-31	-14%
Romania	192	191	191	191	191	-1	0%
World	7 557	7 509	7 464	7 425	7 449	-108	-1%

a) Countries with area under vine of more than 32 kha

Sources: OIV, FAO

WORLD PRODUCTION OF WINE

(JUICES & MUSTS EXCLUDED)



With a 17% increase compared to 2017 (+43 million hl), wine production in 2018 is the 2nd highest since 2000

Sources: OIV, FAO

(excluding juices and must) in 2018 is one of the highest since 2000 with a volume of 292 million of hectoliters, representing an increase of 17% compared to 2017. It should be remembered that 2017 was marked by very difficult weather conditions that had affected production in many countries. Italy (54.8 million of hectoliters) confirms its position as the leading world producer, followed by France (48.6 million of hectoliters) and Spain (44.4 million of hectoliters). The level of production in the United States remains high (23.9 million of hectoliters). In South America, production increased significantly: in Argentina (14.5 million of hectoliters), in Chile (12.9 million of hectoliters). And South Africa (9.5 million of hectoliters) suffered an unfavourable drought. As a result of the drop in the grape yield, wine production in China (9.1 million of hectoliters) is in a 2nd year of recession with -22% over the 2017/2018 wine year.

Stabilised wine consumption

The available data show a stabilisation of global consumption in 2018, estimated at around 246 millions of hectoliters. Since 2014, the trend has therefore been towards a stabilisation or recovery in consumption in European countries, which have traditionally been consumers, as well as the development of new consumption poles, especially in Asia. With 33 million of hectoliters, the United States confirms its position as the biggest global consumer country since 2011, followed by France (26.8 million of hectoliters), Italy (22.4 million of hectoliters), Germany (20 million of hectoliters) and China (17.9 million of hectoliters).

International wine trade increases in terms of value

In 2018, the world wine trade volume was slightly down compared to the 2017 level (-0.7%), with 108 million of hectoliters, but its value increased by 1.2% to reach 31 billion of euros. By looking at the repartition by type of packaging in 2018, (...)

Uno sguardo sulla situazione vitivinicola mondiale

Durante il 42° Congresso mondiale della vigna e del vino a Ginevra, in Svizzera, Pau Roca, il direttore generale dell'OIV, l'Organizzazione internazionale della vigna e del vino, ha presentato il bilancio 2018 mostrando una panoramica del settore viticolo. La relazione riguarda le aree vitate, la produzione di uva, la produzione e il consumo di vino, nonché i volumi di importazione e di esportazione. Dal bilancio è emerso che nel 2018 la superficie viticola mondiale è ascesa a 7,4 milioni di ettari; la produzione mondiale di uva ha raggiunto i 78 milioni di tonnellate; la produzione mondiale di vino (esclusi succhi e mosti) è stimata in 292 milioni di ettolitri; il consumo mondiale di vino è stimato in 246 milioni di ettolitri e il commercio mondiale di vino raggiunge i 108 milioni di ettolitri in volume e i 31 miliardi di euro in valore.

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WINE

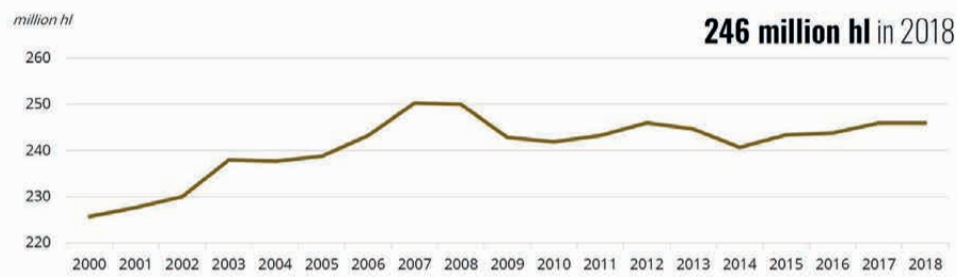
Major wine producers ^a

million hl	2014	2015	2016	2017	2018	2018/2017 Variation in volume	2018/2017 Variation in %
Italy	44.2	50.0	50.9	42.5	54.8	12.3	29%
France	46.5	47.0	45.3	36.3	48.6	12.3	34%
Spain	39.5	37.7	39.7	32.5	44.4	11.9	37%
USA [*]	23.1	21.7	23.7	23.3	23.9	0.5	2%
Argentina	15.2	13.4	9.4	11.8	14.5	2.7	23%
Chile	9.9	12.9	10.1	9.5	12.9	3.4	36%
Australia	11.9	11.9	13.1	13.7	12.9	-0.8	-6%
Germany	9.2	8.8	9.0	7.5	10.3	2.8	38%
South Africa	11.5	11.2	10.5	10.8	9.5	-1.4	-12%
China	13.5	13.3	13.2	11.6	9.1	-2.6	-22%
World	270	275	270	249	292	43	17%

a) Countries with a wine production of more than 1 million hectoliters

Sources: OIV, FAO

GLOBAL WINE CONSUMPTION



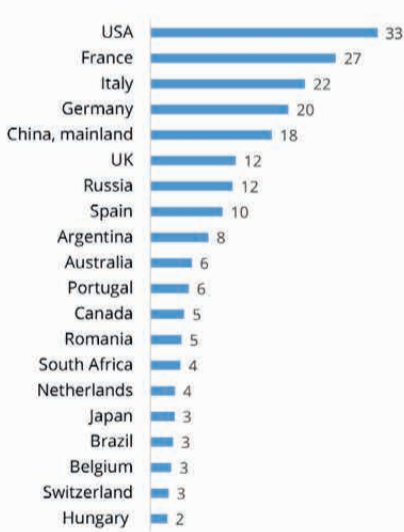
After the 2008 economic crisis, global wine consumption has been fluctuating between 241-246 mhl

Since 2014 we observe a steady growth in consumption which seems to stabilize in 2018

Sources: OIV, FAO

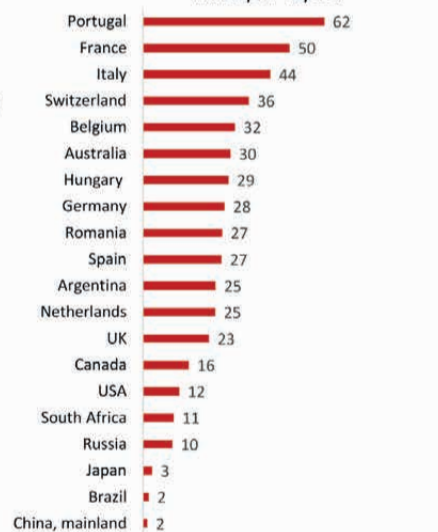
WINE CONSUMPTION

Total consumption 2018
million hl



Breakdown of these countries by consumption per capita

Per capita (+15) consumption 2018
litres per capita



Sources: OIV, FAO

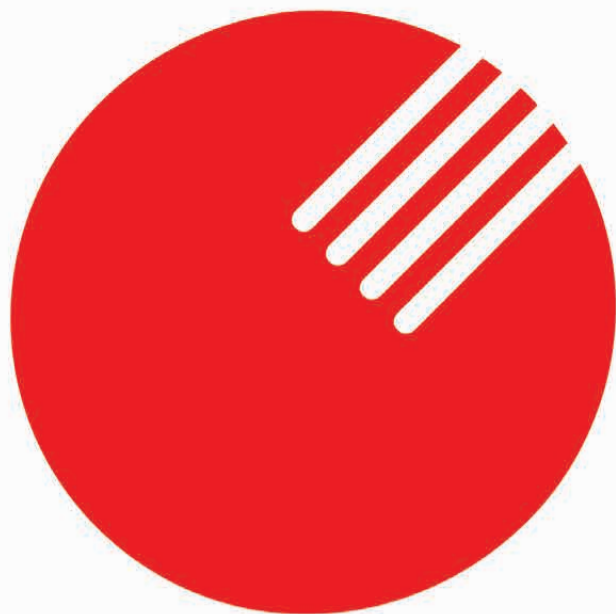
(...) in terms of volume, bottled wine represents 54%, followed by bulk wine (33%), sparkling wines (9%) and BiB (4%). However, in terms of value, bottled wine represents 69.7% of the total value, in the second position we find sparkling wines at 19.8%, bulk wines at 8.6% and BiB at only 2%. Spain (21.1 million of hectoliters), Italy (19.7 million of hectoliters) and France (14.1 million of hectoliters) continue to be the main exporters of wine, accounting for more than 50% of the world volume in 2018. The top five importing countries, Germany (14.7 million of hectoliters), the United Kingdom (13.2 million of hectoliters), the United States (11.5 million of hectoliters), France (7.1 million of hectoliters) and China (6.9 million of hectoliters) continue to account for more than half of global imports in volume terms in 2018.

2019 harvest season: Italy confirms its world leadership
Forecasts for the 2019 grape harvest season were presented in Rome on September 4th by the Wine Observatory. For the first time, Unione Italiana Vini, Ismea and Assoenologi have worked together to provide an even more complete and detailed picture of the viticulture situation. Following the processing carried out at the end of August, the 2019 national production of wine is estimated at 46 million of hectoliters with a 16% of reduction compared to the 2018 record year when 55 million of hectoliters had been touched (Agea data

based on production declarations). Despite a less generous harvest season, Italy aims at maintaining the world leadership for 2019 as well because neither France (43.4 million of hectoliters - estimated on August 19th by the French Ministry of Agriculture) nor the Spain (probably 40 million hectoliters) would seem able to overcome it. "With the 2019 harvest season, we return to the average of recent years, marking a marked decline compared to last year's exceptional production with a variable quality, between good and excellent depending on the area, which allows us to look to the future with optimism and confidence", commented Ernesto Abbona, chairman of Uiv. "It is reasonable to expect prices to remain on Denomination wines, which will remain less subject to the downturn if they remain within the disciplinary volumes, just as last year they were less affected by the increase in production, and a possible upward adjustment of bulk price lists due to the drop harvest also in France and Spain. We maintain the world production primacy, but in a difficult geopolitical context where worrying signs are arriving from some important markets for our wine, while new prospects for development are opening thanks to free trade agreements. The internal market shows a slightly growing trend, even if in a context of decisive change that invites us to a more careful reflection on new strategies to adopt towards our traditional consumer".



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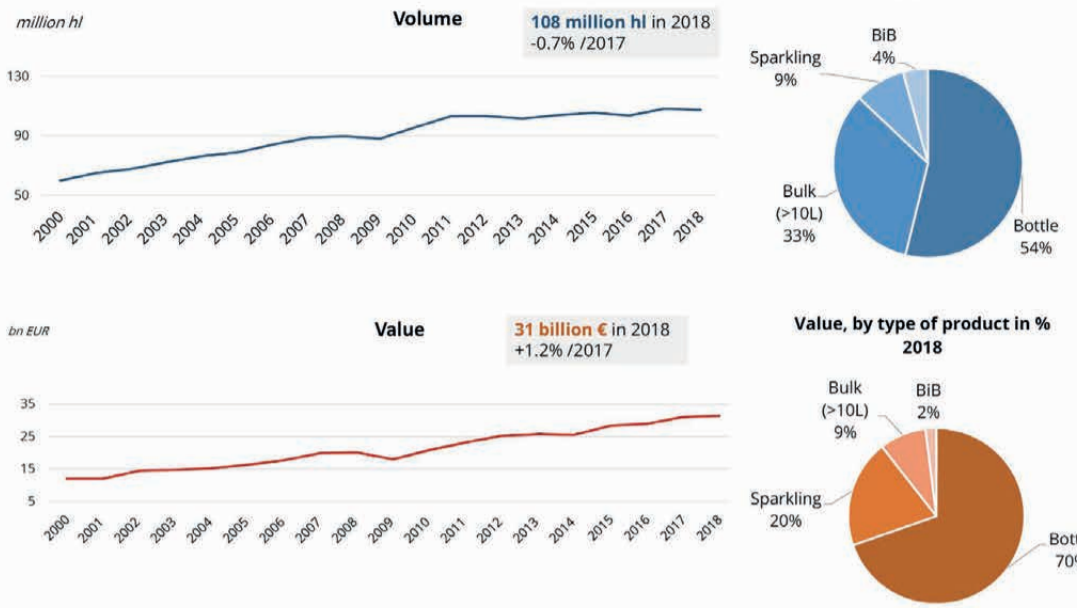
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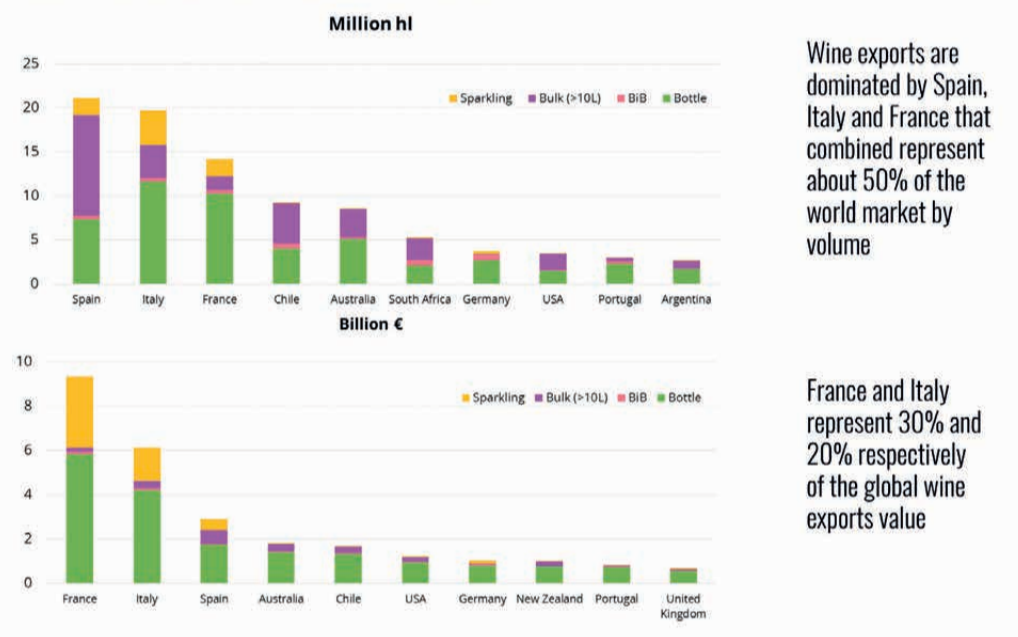


WINE

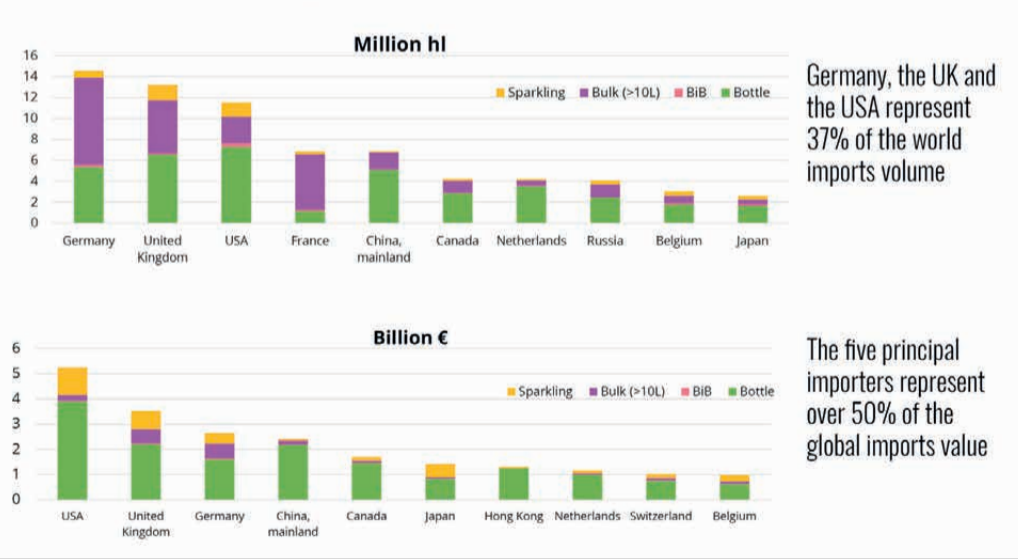
GLOBAL WINE TRADE



MAIN WINE EXPORTERS IN 2018



MAIN WINE IMPORTERS IN 2018



World wine trade by type of product

Value	billion €	2014-2018					2018/2014	
		2014	2015	2016	2017	2018	Variation (bn €)	Variation in %
Sparkling	4.7	5.2	5.4	5.8	6.2	1.5	33%	
Bottled	18.4	20.4	20.9	22.1	21.9	3.5	19%	
Bulk + BiB	2.7	2.8	2.8	3.1	3.3	0.6	21%	

Volume	million hl	2014-2018					2018/2014	
		2014	2015	2016	2017	2018	Variation (mhl)	Variation in %
Sparkling	7.2	7.6	8.1	9.4	9.3	2.1	29%	
Bottled	57.5	57.3	56.3	58.6	57.9	0.4	1%	
Bulk + BiB	39.4	40.7	39.5	40.4	40.3	1.0	3%	

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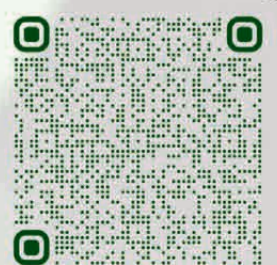
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