



The history of a family company.
Yesterday, Today, Tomorrow.

70
ANNIVERSARY

It's always **us**, but bigger



www.caseificiolongo.it

The history of a family company. **Yesterday, Today, Tomorrow.**



It's always us: Caseificio Longo, the family Company, the Tomino del Boscaiolo ones, those who make you feel at home.

It's always us: those who come from the 1950s, in Bosconero, when Antonio Longo and his wife Franca started their business in a small family workshop, when just one single product was crafted with care and love: the Tomino del Canavese, prepared with milk collected in neighboring stables, which, even today, is packaged by hand.

It's always us: those who make the cheese in the same way as 70 years ago, whether it is 200 liters of milk or 1500 quintals.

It's always us: a family with a mission, to bring well-being to our territory. For this reason, today as in the 1950s, the milk selected for cheese production always comes from Piedmont.

It's always us: those who believe that a company is a bit like a family. And a family would no longer be a family if someone did not care about the happiness of others and did not use all means to achieve it.



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ITALIAN TRADE AGENCY
ICE - Agenzia per la promozione all'estero e l'internazionalizzazione delle imprese italiane

THE ITALIAN FOOD MAGAZINE

BUYER'S • GUIDE

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EDITORIAL

by Federica Bartesaghi

WHEN THE GOING GETS TOUGH...

In the year that has just begun, the food & beverage industry is going to face global-scale challenges. If today the sector is alive and kicking, it is due to exports that, in recent years, have represented the engine of many small, medium and big companies, in Italy too. 2019, nevertheless, has been characterized by a series of dangerous threats to trade among the world's largest economies, with the imposition of new, heavy barriers (especially monetary barriers) between countries.

The worst events took part in the last months of the year, when the United States started a threatening 'New Deal': on the past 18th October, the US Administration announced the imposition of new custom tariffs on the import of a long number of European products, after the WTO ruled in favor of the United States in the dispute over Boeing-Airbus (see article on page 16). Total value of EU goods subjected to the new tariffs (of between 10 and 25%) is close to 6.5 billion euro, of which 4.3 billion connected with the food & beverage sector. If total f&b US imports from Italy were worth 5.48 billion dollars in 2018, the new tariffs affect around 482 million dollars, equal to 9%.

Just one month later, on the first days of December, president Trump was back to threaten EU countries with new tariffs if they decided to apply a tax on revenue from digital services of

major US-based tech companies like Google, Apple, Facebook and Amazon. In France, such a law has already come into force and therefore starting from 2020 the country could face additional duties of up to 100% on certain products, including champagne and cheese.

But if the situation on the 'Western front' remains critical, things are not going better on the Eastern one. On the past December, Russian president Vladimir Putin decided to extend once again the embargo on the imports of food products from Europe, first applied in 2014. The decision was made after the EU Commission prolonged until 31st July 2020 the restrictive measures imposed to Russia in response to the annexation of Crimea during the Ukrainian revolution, which should have been lifted on the 31st January 2020.

Nevertheless, for the Old World the greatest obstacle in 2020 could arrive from the 'inside', where the United Kingdom is finally ready to leave the Union after two years and a half since the referendum held on the 23rd June 2016. A leave that, excluding some sensational last-minute twist, should take place on the 31st January, leading to a totally new and threatening trade scenario on both sides of the Channel.

Food & beverage companies would do better to roll up their sleeves and sharpen their knives. 2020 has just begun.

QUANDO IL GIOCO SI FA DURO...

Nell'anno che è appena cominciato, la partita per il food & beverage si giocherà su scala mondiale. Perché se oggi il settore è vivo e florido, lo deve proprio all'export, che negli ultimi anni ha rappresentato un volano per l'economia di piccole, medie e grandi imprese, anche nel Bel Paese. Il 2019, tuttavia, è stato caratterizzato da una profonda rottura nell'equilibrio commerciale tra le grandi potenze, attraverso l'imposizione di nuove e pesanti barriere al commercio. In prevalenza di natura monetaria.

Il vero e proprio tracollo si è verificato negli ultimi mesi dell'anno, che hanno visto gli Stati Uniti imporsi come promotori di questo 'New Deal': lo scorso 18 ottobre l'amministrazione Usa ha imposto

nuove sanzioni a un gran numero di prodotti europei, in seguito al via libera del Wto in merito al caso Boeing-Airbus (vedi articolo a pagina 16). Dazi che vanno dal 10 al 25% su un'ampia gamma di prodotti, per un totale di 6,5 miliardi di importazioni, di cui 4,3 miliardi riconducibili al food & beverage. Per l'Italia, su un totale di 5,48 miliardi di dollari di importazioni agroalimentari Usa (dato 2018), l'ammontare interessato dai nuovi dazi è di circa 482 milioni di dollari, vale a dire il 9%.

Solo un mese e mezzo dopo, ai primi di dicembre, il presidente Usa è tornato a minacciare i Paesi Ue con nuove sanzioni, qualora decidessero di far pagare le tasse ai giganti americani del web (Google, Amazon, Apple,

Facebook). In Francia, una legge di questo genere è già in vigore. E infatti a partire dal 2020 il Paese rischia di trovarsi gravato di nuovi dazi fino al 100% su svariati prodotti, tra cui e formaggi e lo champagne.

Ma se il fronte occidentale resta caldissimo, non accenna a raffreddarsi nemmeno quello orientale, dove sempre lo scorso dicembre il presidente Putin ha deciso di prorogare nuovamente l'embargo su una lunga lista di importazioni agroalimentari europee, imposto per la prima volta nell'ormai lontano 2014. Una decisione presa in seguito al rinnovo, da parte della Commissione Ue, delle sanzioni imposte alla Federazione Russa dopo l'annessione della Crimea durante il conflitto in Ucraina, che sa-

rebbero dovute scadere il 31 gennaio 2020 ma resteranno invece in vigore fino al 31 luglio 2020.

Per il Vecchio continente, tuttavia, il più grande ostacolo di questo 2020 potrebbe arrivare dall'interno, con il Regno Unito ormai pronto ad abbandonare definitivamente - dopo due anni e mezzo dal fatidico referendum del 23 giugno 2016 - l'Unione europea. Un'uscita che, escludendo qualche clamoroso colpo di scena, dovrebbe concretizzarsi il prossimo 31 gennaio, creando uno scenario commerciale inedito e preoccupante su entrambe le coste della Manica.

Alle aziende del settore agroalimentare non resta quindi che rimboccarsi le maniche e affilare i coltelli. Il 2020 è appena cominciato.

VICENZOVO

Italy's most popular Ladyfinger

Made with high quality ingredients
from our traditional family recipe

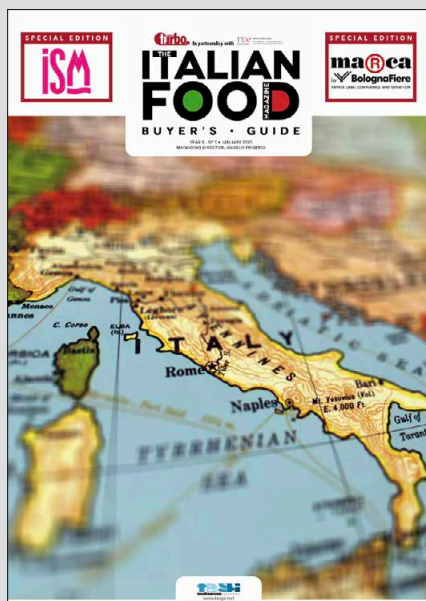


www.matildevicenzi.com

*Source: Nielsen YE 2019 Italy



Italian Fine Pastry.
Since 1905



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**THE ITALIAN
FOOD**
BUYER'S • GUIDE

THE ITALIAN FOOD MAGAZINE

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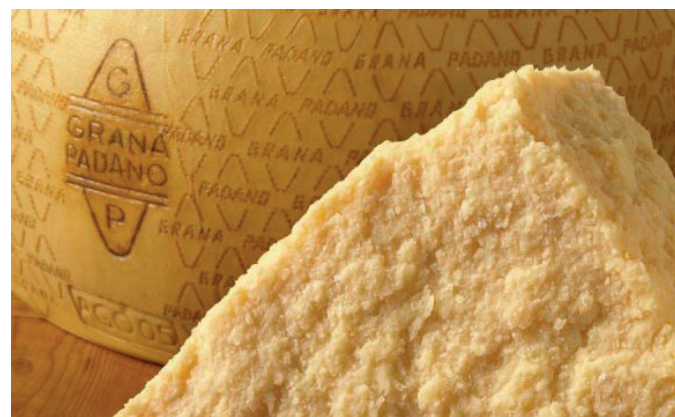
NEWS

GRANA PADANO: PRODUCTION UP BY 5.24% IN 2019

In 2019, 5,182.585 wheels of Grana Padano were produced, with an expected 5.06% increase (equal to 149,297 more wheels). With over 2 million wheels, exports account for 41% of the branded product, growing 5.24% over 2018. Germany is once again the first international destination market, with an expected total of 517,000 wheels.

Grana Padano: produzione a +5,24% nel 2019

Nel 2019 sono state prodotte 5.182.585 forme di Grana Padano, con un incremento stimato del 5,06% (pari a 149.297 forme in più). Con oltre 2 milioni di forme, l'export rappresenta il 41% del prodotto marchiato e fa registrare una crescita del 5,24% sul 2018. La Germania si conferma il primo mercato estero di destinazione, con un totale previsto di ben 517mila forme.



IMPORTS OF HAZELNUTS: THE EU SAYS NO TO A ZERO DUTY REGIME FOR TURKEY

The customs authorities of the EU have rejected Germany's request to extend a zero duty regime to the import of hazelnuts from Turkey. The request was motivated by an alleged decrease in the Italian product between 2019 and 2020, due to adverse climatic events in the peninsula, which was immediately denied by CIA (Italian farmers' association). According to them, "the adverse climatic impact was negative, but certainly not to the point of threatening to cut off supplies to German market." The association also believes that "Germany's motivation is purely instrumental. Since it's the first destination market for Turkish hazelnuts (25%): the zero duty may create a dangerous precedent, with the opening to subsidized imports that would cut out our country, the main Turkish competitor."



Import di nocciole: l'Ue respinge la richiesta di azzerare il dazio alla Turchia

Il comitato doganale europeo ha respinto la richiesta della Germania di azzerare il dazio di importazione delle nocciole dalla Turchia. La richiesta tedesca era motivata dalla prevista riduzione di prodotto italiano nel 2019-20, a causa degli eventi climatici sfavorevoli nella penisola. Una previsione smentita da Cia-Agricoltori italiani, secondo cui "l'impatto climatico avverso non è stato così negativo da compromettere le forniture richieste dal mercato tedesco". L'associazione ritiene anche che "la motivazione della Germania sia puramente strumentale. Berlino è già il primo mercato di sbocco per le nocciole del Paese della Mezzaluna (25%): il dazio zero potrebbe creare un precedente, aprendo il fronte a importazioni agevolate che taglierebbero fuori il nostro Paese, principale competitor turco".

ICE-PROMETEIA REPORT: FOOD EXPORTS ON A GROWING TREND THANKS TO CHINA

In the next two years, trade of agricultural commodities and food items could be growing at a fast pace. This was highlighted by the 2019 edition of the Ice-Prometeia report, according to which Italian foreign trade will grow at a rate of at least one percentage point above the average. After the 1% increase experienced in 2019, the food sector should increase by a further 3.3% in 2020 and 4.7% in 2021, due to the growing demand for Italian products. The export of Italian goods will grow mainly thanks to the demand of China: in the last five years, Italian exports to the country have grown beyond the average and food is probably the sector with the greatest growth potential.

Ice-Prometeia report: export alimentare in crescita grazie alla Cina

Nei prossimi due anni il commercio di commodity e prodotti agroalimentari potrebbe accelerare. Lo rivela il rapporto Ice-Prometeia 2019, secondo cui il commercio estero italiano crescerà con un ritmo superiore di almeno un punto percentuale rispetto alla media. Dopo il +1% registrato nel 2019, l'alimentare dovrebbe segnare nel 2020 un aumento del 3,3% e del 4,7% nel 2021, intercettando la crescente domanda di prodotti italiani. L'esportazione di made in Italy crescerà soprattutto grazie alla Cina. Infatti, negli ultimi cinque anni, l'export verso la Grande Muraglia è cresciuto oltre la media dei concorrenti e quello del food sarebbe il comparto con le migliori prospettive per il futuro.

NESTLÉ IS SELLING ITS US ICE CREAM BUSINESS TO FRONERI

Swiss multinational Nestlé agreed to sell its US ice cream business to UK-based ice cream maker Froneri for 4 billion euro. Nestlé's popular US brands include Häagen-Daaz, Outshine, and Drumstick. Froneri, one of the world's largest ice cream companies, was created in 2016 as a joint venture between the UK-based R&R Ice Cream (owned by French private equity firm PAI Partners) and Nestlé. Nestlé's US ice cream business was worth 1.8 billion dollars in 2018. The acquisition – which turns Froneri into the second largest manufacturer globally – is expected to close in the first quarter of 2020. Following this deal, Nestlé will continue to manage its remaining ice cream businesses in Canada, Latin America and Asia as part of its current market structure.

Nestlé cederà il business americano di gelati a Froneri

Nestlé venderà il suo business americano di gelati a Froneri, una joint venture tra la stessa Nestlé e Pai Partners, creata nel 2016 proprio per focalizzarsi sul settore del gelato. Il gruppo svizzero ha raggiunto un accordo del valore di quattro miliardi di dollari (3,59 miliardi di euro) con Froneri. Che vanta una presenza importante anche in Italia con i marchi: Gelati Motta, Antica Gelateria del Corso e Nuii, la nuova linea di gelati lanciati nel 2019. L'operazione si dovrebbe chiudere nel primo trimestre del 2020, dopo le approvazioni delle autorità competenti. Nestlé continuerà a detenere e gestire direttamente gli asset nel settore del gelato in Canada, America Latina e Asia. Il Gruppo comprende i marchi Häagen-Daaz, Drumstick e Outshine e nel 2018 ha avuto un giro d'affari di 1,8 miliardi di dollari.

BARILLA: LOGISTICS AGREEMENT SIGNED WITH GTS RAIL

Barilla has signed an agreement with GTS, a private railway company specialized in the transportation of cargo, to generate a shift from road to rail for what concerns the delivery of its products to European countries. The service is expected to start in 2020, with a dedicated freight train on a railroad connecting Parma to Germany. Thanks to this agreement, the equivalent of approximately 4,000 trucks will be pulled off the road.

Barilla: siglato accordo logistico con la compagnia ferroviaria Gts

Barilla ha sottoscritto un accordo con la compagnia ferroviaria privata Gts, specializzata nel trasporto merci, per trasferire dalla strada alla rotaia le spedizioni dei prodotti del Gruppo in tutta Europa. Il servizio dovrebbe attivarsi a partire dal 2020 con un treno merci dedicato su una linea che collega Parma alla Germania. Grazie a questo accordo saranno eliminati dalla strada l'equivalente di circa 4mila Tir.



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NEWS

LAGO GROUP SIGNS AN AGREEMENT WITH BOUVARD INTERNATIONAL

The Lago Group company, specialized in the production of pastry and bakery products, has signed an agreement with the Bouvard Group, EU producer of biscuits and baked goods. The agreement allows the Bouvard Group (14 factories in Europe and the US, and a turnover of over 350 million



euro) entry into the capital of Lago Group (two factories and a turnover of over 52 million euro) held by the Lago family, which will continue to manage the com-

pany assisted by the new managing director, Pierre Josselin. Thanks to this partnership, Lago Group will consolidate its own brand leadership by expanding its product portfolio through the large product range of Bouvard Group which, with its commercial strength and its know-how in private label and co-manufacturing, will be able to offer products made by Lago Group factories.

Lago Group: siglato accordo con Bouvard International

L'azienda dolciaria Lago Group ha siglato un accordo con il Gruppo Bouvard, produttore europeo di biscotti e prodotti da forno. L'intesa prevede l'ingresso del Gruppo Bouvard nel capitale di Lago Group detenuto dalla famiglia Lago, che proseguirà nella gestione dell'azienda coadiuvata dal nuovo amministratore delegato, Pierre Josselin. Grazie a questa partnership Lago Group, azienda con due stabilimenti e un fatturato di oltre 52 milioni di euro, consoliderà la leadership a marchio proprio ampliando il suo portafoglio prodotti grazie all'ampiezza della gamma del Gruppo Bouvard. Che vanta un fatturato superiore a 350 milioni di euro, 14 stabilimenti tra Europa e Usa e una consolidata presenza in Italia attraverso le controllate Bouvard Italia e Forneria Guspari. Inoltre, grazie alla sua forza commerciale e al suo know how nella private label e nel co-manufacturing, il Gruppo potrà offrire i prodotti realizzati negli stabilimenti di Lago Group.

MORE PROTECTION AND PROMOTION FOR PECORINO ROMANO PDO IN JAPAN

More protection for Pecorino Romano PDO, which registered its brand also in Japan, a highly interesting market for Italian cheese. In 2017, the country's total consumption of cheeses reached 325 thousand tons (+6.5%), or 2.5 kilos per capita. With regard to Pecorino Romano PDO alone, in the last three years the Consortium exported around 4,000 quintals of cheese, for a turnover of 3 million euros. The Protection Consortium, thanks to the financial support of the European Union, has therefore launched the 'Chizu' (cheese in Japanese) project in 2019, aimed at better promoting its products. A 1 million euro project that will start rolling out in 2020.

Più tutela e promozione per il Pecorino Romano Dop in Giappone

Più tutela della Dop per il Pecorino Romano, che ha registrato il proprio marchio anche in Giappone, un mercato particolarmente interessante per i formaggi del Bel Paese. Nel 2017, infatti, il consumo totale di formaggi è stato di 325 mila tonnellate (+6,5%), ovvero 2,5 chili pro capite. Mentre per quanto riguarda il Pecorino Romano Dop, solo nell'ultimo triennio il Consorzio ha esportato circa 4 mila quintali di formaggio, per un giro d'affari di 3 milioni di euro. Il Consorzio di tutela, grazie al supporto economico dell'Unione Europea, ha perciò avviato nel 2019 il progetto 'Chizu' (formaggio in giapponese), volto alla promozione dei suoi prodotti. Un progetto da 1 milione di euro che verrà avviato nel 2020.



INALPI PRESENTS THE NEW PROTOCOL FOR THE 10TH ANNIVERSARY OF COMPRAL LATTE

On the past December Compral Latte celebrated 10 years since its foundation. The cooperative, established in 2009 from the collaboration between Inalpi, Coldiretti and Ferrero, brings together 225 breeders from the provinces of Cuneo and Turin. The project, which was studied by Inalpi in collaboration with the Faculty of Agriculture of the University of Piacenza, is based on a special algorithm that calculates milk optimal price and provides a guarantee for equal treatment. The breeders of the Inalpi certified and short supply chain are required to comply with a protocol that, during the meeting for the celebrations of the 10th anniversary of Compral Latte, has been further updated with 104 new control points on animal welfare, soil and water management, quality of raw milk, environmental impact and workers' rights. The work done has led the Moretta-based company to acquire new important clients, like Kraft, which from January 2020 will be supplied with pasteurized milk for the preparation of baby food.

Inalpi presenta un nuovo protocollo per i 10 anni di Compral Latte

Lo scorso 17 dicembre Compral Latte ha festeggiato 10 anni dalla sua fondazione. La cooperativa, nata nel 2009 dalla collaborazione tra Inalpi, Coldiretti e Ferrero, oggi riunisce 225 allevatori delle province di Cuneo e Torino. Basato sull'indicizzazione del prezzo del latte alla stalla, attraverso la creazione di un algoritmo, il progetto è stato studiato da Inalpi in collaborazione con la Facoltà di Agraria dell'Università di Piacenza. Agli allevatori della filiera corta e certificata Inalpi è richiesto di rispettare un protocollo che, proprio durante l'incontro per i festeggiamenti del decennale di Compral Latte, è stato aggiornato con 104 punti di controlli su benessere animale, gestione del suolo e delle acque, qualità della materia prima latte, impatto ambientale e diritti dei lavoratori. Il lavoro svolto, si legge in un comunicato stampa di Inalpi, ha portato l'azienda di Moretta ad acquisire nuovi grandi clienti. In particolare Kraft, che da gennaio verrà rifornita di latte pastorizzato destinato alla preparazione di pappe per bambini.

PARMIGIANO REGGIANO AND WHOLE FOODS SIGN HISTORIC AGREEMENT

The Parmigiano Reggiano PDO Protection Consortium has signed a historic agreement with the US retailer Whole Foods Markets to increase the sales in its over 500 stores (487 in the United States, 14 in Canada and 7 the United Kingdom). The agreement highlights three concrete actions aimed at providing "adequate product presentation" inside its stores to help consumers distinguish Parmigiano Reggiano from similar products. First, Whole Foods will organize two events a year to increase the visibility and the participation of the public at the opening ceremony of Parmigiano Reggiano wheels. The agreement also provides for an exchange of information and marketing data collected through the chain's network and social media. In addition, Whole Foods Markets will place informational material provided by the Consortium in every point of sale, to highlight the characteristics of Parmigiano Reggiano and the differences with similar products.

Storico accordo con Whole Food Markets per il Parmigiano Reggiano

Il Consorzio del Parmigiano Reggiano ha siglato un "accordo storico" con la statunitense Whole Food Markets (WFM) per aumentare i volumi della Dop in oltre 500 punti vendita. La catena americana (487 negozi negli Stati Uniti, 14 in Canada e 7 nel Regno Unito) si impegna a sviluppare tre azioni concrete per incrementare le vendite e offrire "un'adeguata presentazione" del prodotto all'interno dei supermercati. La prima misura riguarda l'organizzazione di due eventi all'anno per aumentare la visibilità e la partecipazione del pubblico a cerimonie di apertura della forma di Parmigiano Reggiano. Il secondo punto dell'accordo prevede uno scambio di informazioni e dati di marketing raccolti tramite la rete e i social media. Il terzo punto riguarda l'impegno a collocare materiali informativi del Consorzio in ogni supermercato, al fine di pubblicizzare le caratteristiche del Parmigiano Reggiano e spiegare le differenze rispetto ai prodotti simili.



COLOGNE, 2-5 FEBRUARY 2020

50 YEARS OF ISM.

ARE YOU READY TO CELEBRATE?



In 2020, the International Sweets and Biscuits Fair (ISM) organized by Koelnmesse is celebrating its 50th anniversary. The remarkable success of the event - today the number one trade show in the world for trade professionals in the sweets and snacks industry - began in Cologne in 1971 as a 'spin-off' of Anuga, the world's largest trade fair for food and beverage.

The ISM premiere kicked off in a comparably modest way: 351 companies exhibited new products to 5,800 trade visitors. The impressive figures recorded in the following years underline the dynamic upswing of the trade fair. Since 1971, the number of exhibitors has increased by over 500% (from 351 up to around 1,700); the exhibition space

expanded by more than 600% (from 16,500 m² up to 120,000 m²); and the number of international trade visitors rose by over 500% (from 5,800 up to around 38,000). In 2019, ISM is expanding its exhibition space to include Hall 3.1. In addition, in order to lend the trade fair an even more target group-specific alignment, the familiar 'New Snacks' section is to be divided up into the sections 'Trend Snacks' and 'Natural Snacks'. This gives the suppliers of snack alternatives the opportunity to present their product portfolio to a wide audience.

In the following pages, a preview of the latest product innovations as well as most beloved sweet and savory treats presented by Italian exhibitors at the German event.



ADR
CANESTRELLINI
HALL: 4.2 BOOTH: D040
www.sassellese.it



PRODUCT DESCRIPTION

Today the Canestrellini, a smaller version of the Ligurian Canestrello, represent one of the jewels in the crown of ADR production. Small in size but big in flavour, they have a round shape, with a scalloped edge and a hole in the centre. Made with shortcrust pastry and preservative-free, they are an inimitable specialty due to their pleasant mouth-watering crumbliness and the dusting of very white icing sugar applied after baking which, as a result of the exclusive technique, remains unchanged for the entire shelf life of the product. In addition to the standard packaging, an elegant and fancy gift box is also available.

SHELF LIFE

11 months.

PACKAGING DETAILS

Schell 4.93 Oz (140 g.)

INTERNATIONAL CERTIFICATIONS

Iso 9001, Ifs, Brc, Iso 14001/Rspo Roundtable on sustainable palm oil for levels Mass Balance and Segregation.

AMARELLI LICORICE FACTORY
CARDBOARD BOXES -
10 FLAVOURS
HALL: 4.2 BOOTH: E0324
www.amarelli.it



PRODUCT DESCRIPTION

A refined and surprising selection to taste licorice in all its nuances.

SHELF LIFE

3/5 years.

PACKAGING DETAILS

60 g. cardboard boxes in elegant turnkey counter display.

ANTICA TORRONERIA PIEMONTESE
ASSORTED SWEET TRUFFLES AND
SMALL TRUFFLES
HALL: 4.2 BOOTH: D020
www.torrone.it



PRODUCT DESCRIPTION

The range now includes 14 flavors to satisfy even the most demanding palates. Excellent raw materials and innovative combinations in order to exalt the qualities of Antica Torroneria Piemontese's sweet truffles.

SHELF LIFE

12 months.

PACKAGING DETAILS

7 g. or 14 g. size. Bulk or boxes.

INTERNATIONAL CERTIFICATIONS

Ifs, Brc, Fda, Smeta, Organic.



PRODUCT PREVIEW

CASA DEL DOLCE
TRINKETTO GRAPE FLAVOR
HALL: 10.2 BOOTH: B090
www.casadeldolce.it



PRODUCT DESCRIPTION

Soft drink with grape flavor.

SHELF LIFE

18 months.

PACKAGING DETAILS

70ml X 24 pcs, 6 for carton.

INTERNATIONAL CERTIFICATIONS

Brc, Ifs.

SAPORI
IDEE GOLOSE
HALL: 11.2 BOOTH: D061
www.sapori.it/en



PRODUCT DESCRIPTION

A soft filling with cherries and almonds covered with delicious dark chocolate, in convenient single portions.

SHELF LIFE

6 months.

PACKAGING DETAILS

12 g. cardboard packaging.

INTERNATIONAL CERTIFICATIONS

Iso 9001, Brc, Ifs.

DECO INDUSTRIE
FORNAI & PASTICCIERI – ITALIAN
PASTRY TRADITIONAL BISCUITS
HALL: 5.2 BOOTH: G018
www.decoindustrie.it



PRODUCT DESCRIPTION

The new range of Fornai & Pasticceri biscuits represents the goodness of the best Italian pastry tradition. A complete line of eight different biscuits with a sublime and delicate taste, baked to perfection in the most typical forms of the Italian biscuit tradition: Krumiri, Canestrelli and Cookies. Selected and high quality ingredients make those biscuits the ideal assortment to satisfy the global segment of 'snack biscuits', currently a growing trend.

SHELF LIFE

12 months.

PACKAGING DETAILS

250 g. square bottom bag.

INTERNATIONAL CERTIFICATIONS

GMOs free, no hydrogenated fats, recycling packaging materials.

DOLCERIE VENEZIANE
BOUQUET FOR YOU
HALL: 4.2 BOOTH: E028
www.dolcerieveneziane.it



PRODUCT DESCRIPTION

Romantic hand-made bouquet, with a high quality heart of milk chocolate. Special for all events: St. Valentine, Mother's Day, Woman's day, Easter and Christmas season. A unique and exclusive product.

SHELF LIFE

24 months.

PACKAGING DETAILS

80 g.

DOCIARIA MONARDO
ASSORTED CHOCOLATES
HALL: 4.2 BOOTH: B011
www.dolciariamonardo.com



PRODUCT DESCRIPTION

Elegant and prestigious pack of delicious milk chocolates (assorted pralines, gianduiotti, tegolini).

PACKAGING DETAILS

400 g. box.

SHELF LIFE

18 months.

INTERNATIONAL CERTIFICATIONS

Ifs, Brc, Fda.

IL FORNAIO DEL CASALE
GALANI DEI DOGI PETIT
HALL: 3.2 BOOTH: B009
www.gecchele.com



PRODUCT DESCRIPTION

Typical Italian carnival product.

SHELF LIFE

120 days.

PACKAGING DETAILS

150 g.

INTERNATIONAL CERTIFICATIONS

Ifs certification higher level.

FRACCARO SPUMADORO
ORGANIC CLASSIC CROISSANT
HALL: 4.2 BOOTH: B013
www.fraccarospumadoro.it



PRODUCT DESCRIPTION
Fraccaro Spumadoro's croissant are a naturally leavened oven baked product. Made with Icea certified sourdough starter, vegetable margarine without hydrogenated fats and natural flavors.

SHELF LIFE
6 months.

PACKAGING DETAILS
175 g. (35g x 5pz)

INTERNATIONAL CERTIFICATIONS
Icea.

GANDOLA BISCOTTI
I SOLITI BUONI
HALL: 4.2 BOOTH: B025
www.gandola.it



PRODUCT DESCRIPTION
Stuffed biscuits.

SHELF LIFE
10 months.

PACKAGING DETAILS
250 g.

GHIOTT FIRENZE
GHIOTTINI
HALL: 4.2 BOOTH: D039
www.ghiott.it



PRODUCT DESCRIPTION
Ghiottini are almond cantuccini biscuits, made in Florence with passion since 1953, according to the same original recipe. Made with fresh barn eggs and only natural aromas.

SHELF LIFE
15 months.

PACKAGING DETAILS
200 g. bag.

INTERNATIONAL CERTIFICATIONS
Brc, lfs.

follow

ITALIAN EXCELLENCE



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

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



PRODUCT PREVIEW

**HDI HOLDING DOLCIARIA
ITALIANA - SORINI**
BISCUITS CRUNCHY BROWNIES
HALL: 3.2 BOOTH: C019
www.sorini.it



PRODUCT DESCRIPTION
Milk chocolate filled with milk cream and cocoa brownies with crunchy biscuits.
SHELF LIFE
18 months.
PACKAGING DETAILS
200 g. net weight. 7.05oz

ICAM CIOCCOLATO
VANINI BARS BAGUA PERÙ -
DARK CHOCOLATE 62%
WITH FIGS AND ALMONDS
HALL: 10.2 BOOTH: G030
www.icamcioccolato.com
www.vaninicioccolato.com



PRODUCT DESCRIPTION
A new formulation that offers a mix of flavors perfectly blended, alternating on the palate soft and sweet notes with more pronounced nuances. The figs, typical fruits of the Mediterranean area, with their sweet taste are perfectly linked to the crunchiness of toasted almonds for a sweet and energetic taste at the same time.
PACKAGING DETAILS
100 g. bar
INTERNATIONAL CERTIFICATIONS
All the recipes bear the logo of the Barred ear, indicating all the gluten free recipes, and the bean to bar logo, which guarantees the excellence of the product. The chocolate bars are also Sustainable Trade certified.

IDB
PANETTONE CLASSICO ANTICA
PASTICCERIA MUZZI
HALL: 3.2 BOOTH: A029
www.idbgroup.it



PRODUCT DESCRIPTION
Classic panettone awarded three stars by international Taste Institute Bruxelles.
SHELF LIFE
240 days.
PACKAGING DETAILS
1.000 g.
INTERNATIONAL CERTIFICATIONS
Brc.

INCAP
'CESARE CARRARO' GIFT BOXES
HALL: 4.2 BOOTH: E038 (AREA B)
www.incap.it



PRODUCT DESCRIPTION
Wooden or metal gift boxes available in different sizes. They can contain hard candies or soft jellies and their graphics are customizable. They come in a refined packaging with a ribbon and a branded tag. There is a small quantity required for a minimum order, without further printing plant costs. Particularly suitable for duty free shops.
SHELF LIFE
36 months.
PACKAGING DETAILS
Metal boxes: g. 150/300/400 (filled in with hard candies); g. 125/250/350 (filled in with hard candies); wooden boxes: g. 300/400 (filled in with gelées); g. 250/350 (filled in with gelées).
INTERNATIONAL CERTIFICATIONS
Halal, Kosher, Haccp.

LAGO GROUP
MINI ROLL WAFERS (4 SKU'S)
HALL: 10.2 BOOTH: H081
www.lagogroup.it



PRODUCT DESCRIPTION
Rolled wafer bites, filled with soft cream.
SHELF LIFE
18 months.
PACKAGING DETAILS
125 g. bag.
INTERNATIONAL CERTIFICATIONS
Ifs, Halal, Kosher.

LAICA
ASSORTED BOULES
HALL: 3.2 BOOTH: B018
www.laica.eu



PRODUCT DESCRIPTION
Pralines of fine milk, white, rose and extra dark chocolate that contain cream fillings, cereals and grains. The delicious Laica boules are enclosed in the new bags completely dedicated to their classic goodness. Taste and imagination for a unique and timeless pleasure.
SHELF LIFE
12/18 months depending on the type of boule.
PACKAGING DETAILS
Bag 100 g., 450 g. and 1 kg.
INTERNATIONAL CERTIFICATIONS
Brc, Ifs Food, Utz, Fairtrade, Rspo, Kosher, Iso 22000, Sedex.

MANGINI
CHOCOLATE TRUFFLE
HALL: 5.2 BOOTH: M018
www.manginicaramelle.eu



PRODUCT DESCRIPTION
 Sweet truffle with hazelnuts and chocolate.
SHELF LIFE
 1 year.
PACKAGING DETAILS
 Around 7 g. 1 kg bulk/70 g. bag
INTERNATIONAL CERTIFICATIONS
 Ifs Food Version 6.1, November 2017

ORE LIETE
ICEREALI WITH GINGER
HALL: 4.2 BOOTH: B029
www.orelieteperugia.it



PRODUCT DESCRIPTION
 A new biscuit from the iCereali line with a rich and natural taste. The authentic taste and the unmistakable crunchiness of cereals combined with the pungent warmth of the succulent stem ginger for a unique combination. A high-fiber biscuit with no colourings, no hydrogenated fats and no GMO ingredients to spice up your healthy life.
SHELF LIFE
 12 months.
PACKAGING DETAILS
 250 g.
INTERNATIONAL CERTIFICATIONS
 Brc, Ifc.

TARTUFLANGHE
TRIFULÒT POCKET BOXES
HALL: 4.2 BOOTH: C029
www.tartuflanghe.com



PRODUCT DESCRIPTION
 Delicious sweet pralines in a colored box, suitable for every moment of consumption. Available in three flavors: white, black and pistachio.
SHELF LIFE
 9 months.
PACKAGING DETAILS
 105 g.
INTERNATIONAL CERTIFICATIONS
 Brc, Ifs, 'Eccellenza Artigiana'.

MELEGATTI 1894
125TH ANNIVERSARY
SPECIAL EDITION
ORIGINAL PANDORO 1 KG
HALL: 4.2 BOOTH: B009
www.melegatti.it



PRODUCT DESCRIPTION
 An elegant gift pack in limited edition, produced to celebrate the 125th anniversary of Melegatti 1894. It contains the inimitable Pandoro Originale, made with fresh butter and eggs, "0" type soft wheat flour and Melegatti 1894 mother yeast jealously guarded for more than 125 years, which gives the product the softness and the unmistakable taste of Melegatti fine confectionery.
SHELF LIFE
 6 months.
PACKAGING DETAILS
 1000 g.

The original
Trinketto
AMERICAN GRAPES FLAVOUR

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 hall 26 stand A118
ISM
 COLOGNE
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 hall 10.2 stand B090

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PRODUCT PREVIEW

TERRE DI PUGLIA
MINI BREADSTICKS - FINGER BITES
LEMON AND GINGER
HALL: 10.2 BOOTH: H064
www.terredipuglia.it



PRODUCT DESCRIPTION

Terre di Puglia presents the new line of snack on the go: mini breadsticks - finger bites lemon and ginger. Sweet mini breadsticks, with a delicate and lively taste, made according to the ancient Apulian recipe with the finest ingredients, without the addition of artificial flavors, preservatives, colorings or hydrogenated fats.

PACKAGING DETAILS
200 g. bag.

SHELF LIFE
18 months.

INTERNATIONAL CERTIFICATIONS
Brc, Ifs.

TIPICO
SAVOIARDONE FOR TIRAMISÙ
HALL: 11.2 BOOTH: C052
www.tipicodisardegna.com



PRODUCT DESCRIPTION

The new Savoiardone di Sardegna is presented in a new format, the 230 g. pack. From tradition and innovation it is made with a new recipe designed for tiramisù, with less 30% of fat, 100% Italian ingredients, made only with free-range fresh eggs shel- led by the company.

SHELF LIFE
5 months.

PACKAGING DETAILS
230 g. pack

INTERNATIONAL CERTIFICATIONS
Ifs.

VALLEDORO
BOTTON D'ORO
HALL: 4.2 BOOTH: B028
www.valledorospa.it



PRODUCT DESCRIPTION

Delicious savory gluten-free biscuits with chickpea flour. A crumbly and tasty snack, with a typical chickpea flavor, rich in fiber and protein.

PACKAGING DETAILS
Resealable 200 g. packaging. 12 units x carton.

SHELF LIFE
8 months.

INTERNATIONAL CERTIFICATIONS
Ifs, Brc.

VERGANI SECONDO
CHOCO STICKS
HALL: 11.2 BOOTH: B041 – B049
www.vergani.it



PRODUCT DESCRIPTION

Mini chocolate sticks assortment (dark 85%, dark 70%, extra fine milk).

SHELF LIFE
24 months.

PACKAGING DETAILS
180 g. bag.

INTERNATIONAL CERTIFICATIONS
Brc, Ifs, Iso 9001, Hccp.

VICENZI
PUFF PASTRY STICKS WITH CINNAMON
HALL: 10.2 BOOTH: B071
www.matildevicenzi.com



PRODUCT DESCRIPTION

With their crispness and delicate flavour, the Mil- lefoglie d'Italia puff pastries are the symbol of Vi- cenzi's fine Italian pastry tradition. The careful se- lection of raw materials is noticeable from the very first glimpse. The dough's main ingredients are flour, water and butter. The traditional recipe requi- res that the dough is gently folded back on itself many times obtaining a delicious and fragrant pas- try composed of 192 layers. Puff pastry with cinna- mon are delights at first bite, thanks to the flavour of Ceylon Cinnamon used.

PACKAGING DETAILS
9 g./1piece.

SHELF LIFE
12-365.

INTERNATIONAL CERTIFICATIONS
Brc, Ifs, Kosher, Halal, Iso 9001

WITOR'S
NOISETTE
HALL: 10.2 BOOTH: A018 - B019
www.witors.it



PRODUCT DESCRIPTION

Dark chocolate with hazelnut filling and whole hazelnut.

SHELF LIFE
15 months.

PACKAGING DETAILS
Flat Bottom Bag 200g., individually wrapped.

INTERNATIONAL CERTIFICATIONS
Utz.

Nuremberg, Germany

12-15.2.2020

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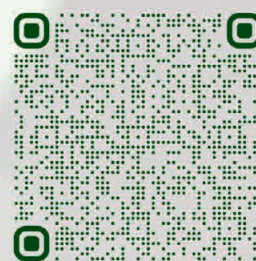
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TRADE TARIFFS: A SHARED CONCERN

A NOMISMA ANALYSIS OF CUSTOM DUTIES
IMPOSED BY THE UNITED STATES ON IMPORTS
OF FOOD & BEVERAGE FROM THE EU.
ITALY, FRANCE, GERMANY, SPAIN AND THE UK
ARE THE MOST AFFECTED.

US F&B IMPORTS SUBJECT TO A 25% TARIFF.
THE 5 MOST AFFECTED EU COUNTRIES

Supplying country	Import subject to 25% tariff (mln dollars, 2018)	Incidence on total f&b US imports
France	1,272.89	20%
Spain	849.11	35%
Italy	482.11	9%
Germany	423.68	19%
Uk*	1,794.02	60%

* of which 1.6 billion dollars are related to imports of Scotch Whisky, only partially subject to the tariffs and therefore not yet included in the total.

Source: Nomisma

Total value of EU goods interested by the new tariffs on US imports is close to 6.5 billion euro, of which 4.3 billion connected with the food & beverage sector. It all started in 2004, with the Airbus-Boeing trade dispute: Europe was accused of providing massive subsidies (23 billion dollars) to planmaker Airbus, which were illegal according to the United States. In response, the EU said that Boeing also received important subsidies from the US government. In the end, the Word Trade Organization (WTO) ruled in favor of the US, granted President Donald Trump’s administration the right to levy billions against imports of European goods. A Nomisma analysis based on 2018 import data of 113 food & beverage products included in the US list highlights the most affected EU countries.

Italy: the worst consequences for cheese and deli meats

If total f&b US imports from Italy were worth 5.48 billion dollars in 2018, the new tariffs affect around 482 million dollars, equal to 9%. Half of this value is connected with cheeses, mainly PDO cheeses, like Parmigiano Reggiano, Grana Padano and Pecorino Romano. Wine, olive oil and pasta were not included in the ‘black list’, while spirits is the second most hist product category: (25% import tariff, affecting 167 million dollars).

For Italian deli meats, that find in the US their second largest market on a global scale (US imports were worth 116 million euro and around 10,000 tons in 2018), the situation is far more complicated. Until the 18th of October custom duties were low (0.8 cent/kg). Now, a shipping is charged one quarter of its total value: a 25% tariff that affects salami and mortadella, with the exclusion of seasoned raw ham (with or without bone), speck and cooked ham.

France: still wines become more expensive

Still wines are the most affected f&b category in France, with an export value of 1.3 billion dollars (20% of total French f&b exports to the US). Both Champagne and French cheeses were not included in the list (so far).

Spain: olive oil and wines the most penalized

The Spanish products included in the blacklist account for around 35% of the country’s total f&b exports to the US. Olive oil and wines are the most affected product categories. Overall, exports to the US of these two sectors generate 700 million euro. Fresh cheeses and some pork meat products were also affected.

United Kingdom: target on spirits

Spirits, especially whiskey, are the country’s most affected product category. Nevertheless, the list specifies that the import of this kind products will be taxed only in part and not on the whole amount. It is worth noticing that, in 2018, US imports of Scotch Whiskey were worth 1.6 billion dollar. If we sum up this value with the one generated by other British goods included in the list, the result is that US tariffs affect almost 60% the total f&b imports from the UK.

Germany: main tariffs on spirits

With regards to Germany, the value generated by imports subject to the new tariffs is the lowest of the five top exporters considered by Nomisma’s analysis: about 424 million dollars, 19% of the total f&b trade to the US. Also in this case, spirits represent the most affected product category.

Dazi amari per tutti

Nomisma analizza le misure imposte dagli Stati Uniti sull’agroalimentare europeo. Un mercato da 4,3 miliardi di euro. Italia, Francia, Germania, Spagna e Regno Unito sono i top exporter. I settori più colpiti, Paese per Paese.

DISCOUNT (R)EVOLUTION

A NIELSEN ANALYSIS EXPLORES THE DEVELOPMENT OF DISCOUNTERS ACROSS EUROPE. A SALES CHANNEL THAT HAS PASSED FROM 15,000 STORES IN 1990 TO 42,000 IN 2017.



The Nielsen research company recently analyzed the market scenario of discount retailers across Europe. One of the key findings is the accelerated evolution experienced by hard discounters in the past 10 years, when they passed from their initial simple model of offering just low price and private label products to more experimental retailers, trialing new growth tactics and appealing to a broader shopper base.

Shopping at discounters now resembles the shopping experience in super- and hypermarkets, with a greater focus on A-Brands, longer opening hours, loyalty programs, and advertising. But that's just the

beginning. According to Nielsen, hard discounters continue to become much more sophisticated in their business models, offering permanent listings for A-brands, including price promotions, much greater focus on their assortment, focus on sustainability, overhaul of their private label, and big efforts in redesigning their stores.

What's behind their growth

Historically, hard discounters had store expansions to thank for their buoyant growth. In 1990, according to Nielsen there were approximately 15,000 hard discounter stores in Europe. A number which expanded

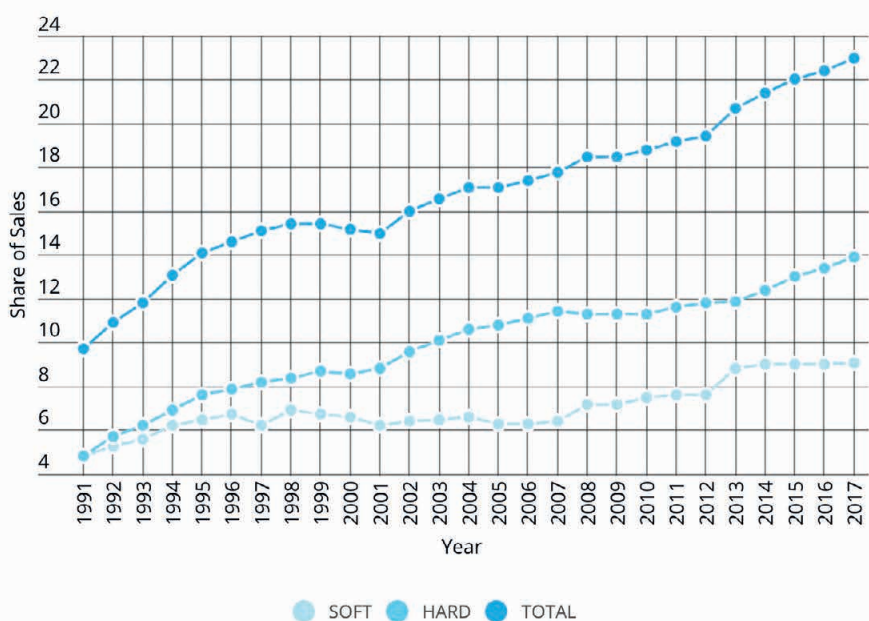
to 42,000 in 2017. In Europe as a whole, the limitations of growth by new openings has been reached. Despite the number of stores stagnating in recent years, discounters still managed to gain share.

Hard discounters, which drive growth in discounters overall, have turned to A-Brands as a driver. The latter drive half of 8.8% overall discounter growth, with only 30% market share - outstanding performance compared to Private label brands. Moreover, A-Brands create additional net demand in discounters by expanding assortment, while PLB's new listings fail to do that.

L'evoluzione del discount

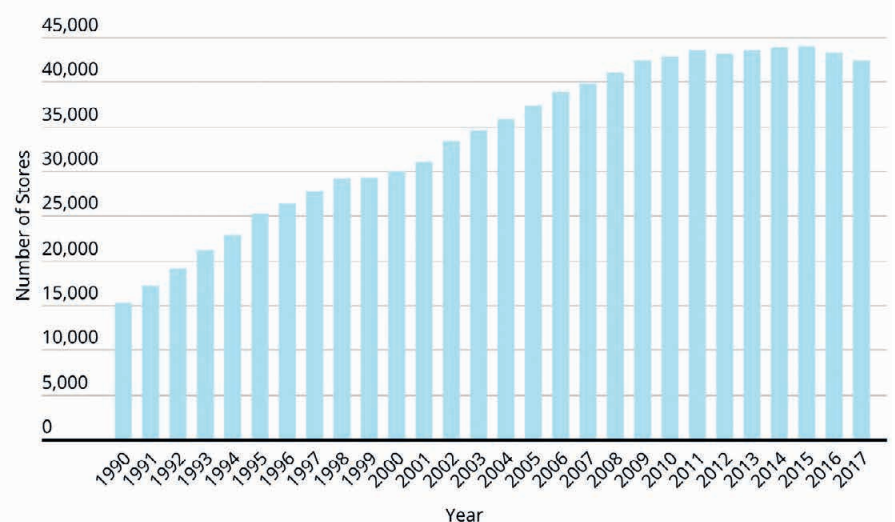
La multinazionale di ricerche di mercato Nielsen ha analizzato lo scenario dei discount in Europa. Un canale che, negli ultimi 10 anni, ha rivoluzionato totalmente il proprio modello di business, passando dall'offrire prodotti a basso costo e prevalentemente a marchio del distributore a un'esperienza d'acquisto che si avvicina molto a quella di super e ipermercati. Con l'inclusione in assortimento di molti brand aziendali, orari di apertura più ampi, programmi di fidelizzazione e promozioni.

DISCOUNTERS SHARE OF SALES: EUROPE



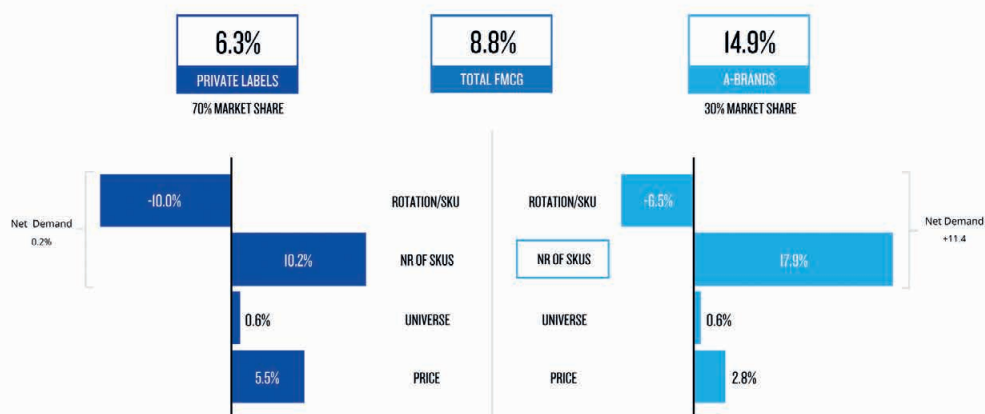
HARD DISCOUNTER STORE EXPANSIONS STAGNATE IN EUROPE

Universe of Discounter Stores (Hard and Soft) in Europe



A-BRANDS DRIVE HALF OF DISCOUNTERS GROWTH

FMCG% VALUE GROWTH IN EUROPEAN DISCOUNTERS (HARD+SOFT), 2018 VS 2016



Source: Nielsen



TRADE SHOWS 2020

THE GLOBAL AND ITALIAN TRADE EXHIBITION'S CALENDAR



	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
JANUARY	Wed 1	Thu 2	Fri 3	Sat 4	Sun 5	Mon 6	Tue 7	Wed 8	Thu 9	Fri 10 FOOD & WINE EXPO (GOLD COAST - QUEENSLAND) foodandwineexpo.com.au	Sat 11	Sun 12 WINE PROFESSIONAL (AMSTERDAM) http://web.bellavita.com	Mon 13 BELLAVITA EXPO (AMSTERDAM) http://web.bellavita.com	Tue 14	Wed 15 AFP ANFAS FOOD PRODUCT (ANTALYA) www.anfasfoodproduct.com	Thu 16 SANA UP (BOLOGNA) http://sanaup.sana.it	Fri 17	Sat 18 MARCA (BOLOGNA) www.marca.bolognathere.it	Sun 19 WINTER FANCY FOOD SHOW (SAN FRANCISCO) www.specialtyfood.com/shows-eSabs	Mon 20	Tue 21	Wed 22 BIO-BEURS (ZWOLLE) www.bio-beurs.nl	Thu 23	Fri 24	Sat 25	Sun 26 MILLESIME BIO (MONTPELLIER) www.millesime-bio.com	Mon 27	Tue 28	Wed 29 IPPE (ATLANTA) www.ippeexpo.org	Thu 30	Fri 31
FEBRUARY	Sat 1	Sun 2	Mon 3	Tue 4 SIRHA (BUDAPEST) www.sirha-budapest.com	Wed 5 FRUIT LOGISTICA (BERLIN) www.fruitlogistica.de	Thu 6	Ven 7	Sat 8	Sun 9	Mon 10 WINE PARIS (PARIS) www.wineparis.com	Tue 11	Wed 12 BIOFACH (NUREMBERG) www.biofach.de	Thu 13	Ven 14	Sat 15 FOODNOVA (RIMINI) www.foodnova.eu	Sun 16	Mon 17	Tue 18 DAIRY TECH (MOSCOW) http://md-expo.ru	Wed 19	Thu 20	Ven 21	Sat 22 GOLOSITALIA (BRESCIA) www.golostalia.it	Sun 23	Mon 24	Tue 25	Wed 26 SALON DU FROMAGE (PARIS) www.salon-fromage.com	Thu 27	Ven 28	Sat 29		
MARCH	Sun 1	Mon 2	Tue 3 NATURAL PRODUCTS EXPO WEST (ANAHEIM) www.expowest.com	Wed 4 FHA HORECA (SINGAPORE) www.fhahoreca.com	Thu 5	Fri 6	Sat 7	Sun 8	Mon 9 ANUFOOD BRAZIL (SAN PAOLO) www.anufoodbrazil.com	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15 AFRICA FOOD MANUFACTURING (IL CAIRO) www.africa-foodmanufacturing.com	Mon 16	Tue 17	Wed 18	Thu 19	Fri 20	Sat 21	Sun 22 FOODEXPO (HERNING) www.foodexpo.dk	Mon 23	Tue 24 PROPAP VIETNAM (HO CHI MINH CITY) www.propapvietnam.com	Wed 25	Thu 26	Fri 27	Sat 28	Sun 29 HOTELX (SHANGHAI)	Mon 30	Tue 31 GASTRONORD
APRIL	Wed 1 B/OPEN (VERONA) https://en.hotelex.cn	Thu 2	Fri 3	Sat 4	Sun 5	Mon 6 DJAZAGRO (ALGERI) www.djazagro.com	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11	Sun 12	Mon 13	Tue 14	Wed 15 WINE & GOURMET JAPAN (TOKYO) www.wineandgourmetjapan.com	Thu 16	Fri 17	Sat 18	Sun 19 VINITALY (VERONA) www.vinitaly.com	Mon 20	Tue 21	Wed 22 VINORUS (KRASNODAR) www.vinorus.ru/en-GB	Thu 23	Fri 24	Sat 25	Sun 26	Mon 27	Tue 28	Wed 29	Thu 30	
MAY	Fri 1	Sat 2	Sun 3	Mon 4	Tue 5	Wed 6	Thu 7	Fri 8	Sat 9	Sun 10	Mon 11	Tue 12	Wed 13	Thu 14	Fri 15	Sat 16	Sun 17	Mon 18 LONDON WINE FAIR (LONDON) www.londonwinefair.com	Tue 19	Wed 20	Thu 21	Fri 22	Sat 23	Sun 24	Mon 25	Tue 26 SPS IPC DRIVES (PARMA) www.spsitalia.it	Wed 27	Thu 28	Fri 29 GOOD FOOD & WINE SHOW (MELBOURNE) www.goodfoodshow.com.au	Sat 30	Sun 31
JUNE	Mon 1	Tue 2 EXPO PACK MEXICO (MEXICO CITY) www.expopackmexico.com.mx	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	Mon 8	Tue 9	Wed 10	Thu 11	Fri 12	Sat 13	Sun 14	Mon 15	Tue 16	Wed 17 PROPAP ASIA (BANGKOK) www.propapasia.com	Thu 18	Fri 19	Sat 20	Sun 21	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26	Sat 27	Sun 28 SUMMER FANCY FOOD SHOW (NEW YORK) www.specialtyfood.com/shows	Mon 29	Tue 30	
JULY	Wed 1	Thu 2	Fri 3	Sat 4	Sun 5	Mon 6	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11	Sun 12	Mon 13	Tue 14	Wed 15	Thu 16	Fri 17 FOOD & WINE EXPO (CANBERRA) http://foodandwineexpo.com.au/shows/canberra	Sat 18	Sun 19	Mon 20	Tue 21	Wed 22 MYFOODTECH (KUALA LAMPUR) https://myfb.com.my/myfoodtech	Thu 23	Fri 24	Sat 25	Sun 26	Mon 27	Tue 28 FHI (JAKARTA) www.foodhotelindonesia.com	Wed 29	Thu 30	Fri 31
AUGUST	Sat 1	Sun 2	Mon 3	Tue 4	Wed 5 WOFEX WORLD FOOD EXPO (MANILA) www.wofex.com	Thu 6	Fri 7	Sat 8	Sun 9	Mon 10	Tue 11	Wed 12	Thu 13	Fri 14	Sat 15	Sun 16	Mon 17	Tue 18	Wed 19	Thu 20	Fri 21	Sat 22	Sun 23	Mon 24	Tue 25	Wed 26	Thu 27	Fri 28 GOOD FOOD & WINE SHOW (PERTH) www.goodfoodshow.com.au	Sat 29	Sun 30	Mon 31
SEPTEMBER	Tue 1	Wed 2	Thu 3	Fri 4	Sat 5	Sun 6	Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19	Sun 20	Mon 21 NATEXPO (LYON) www.natexpo.com	Tue 22	Wed 23 WARSAW FOOD EXPO (WARSAW) www.warsawfoodexpo.pl	Thu 24 ANNAPORNA ANUFOOD INDIA (MUMBAI) www.anufoodindia.com	Fri 25	Sat 26	Sun 27	Mon 28	Tue 29	Wed 30	
OCTOBER	Thu 1	Fri 2	Sat 3	Sun 4	Mon 5	Tue 6	Wed 7	Thu 8	Fri 9	Sat 10	Sun 11	Mon 12	Tue 13	Wed 14	Thu 15	Fri 16	Sat 17	Sun 18	Mon 19	Tue 20	Wed 21	Thu 22	Fri 23	Sat 24	Sun 25	Mon 26	Tue 27	Wed 28	Thu 29	Fri 30	Sat 31
NOVEMBER	Sun 1	Mon 2	Tue 3 YUMMEX (DUBAI) www.yummex-me.com	Wed 4	Thu 5	Fri 6 MERANO WINEFESTIVAL (MERANO) www.meranowinefestival.com	Sat 7	Sun 8	Mon 9	Tue 10	Wed 11 SIAL INTERFOOD (JAKARTA) www.sialinterfood.com	Thu 12	Fri 13	Sat 14	Sun 15	Mon 16	Tue 17	Wed 18	Thu 19	Fri 20	Sat 21	Sun 22	Mon 23	Tue 24	Wed 25	Thu 26	Fri 27	Sat 28	Sun 29	Mon 30	
DECEMBER	Tue 1	Wed 2 WORLD BULK WINE EXHIB. (AMSTERDAM) *	Thu 3	Fri 4	Sat 5	Sun 6	Mon 7	Tue 8	Wed 9	Thu 10 SIAL MIDDLEEAST (ABU DHABI) *	Fri 11	Sat 12	Sun 13	Mon 14	Tue 15	Wed 16	Thu 17 PACPROCESS MEA (IL CAIRO) www.pacprocess-mea.com	Fri 18	Sat 19	Sun 20	Mon 21	Tue 22	Wed 23	Thu 24	Fri 25	Sat 26	Sun 27	Mon 28	Tue 29	Wed 30	Thu 31

FOOD ORGANIC WINE TECHNOLOGIES
* DATES TO BE CONFIRMED

LA NOTA
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ITALIAN WINE BUYER'S GUIDE
ITALIAN FOOD BUYER'S GUIDE

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WINE EXPORT: ITALY (CAN) DO IT BETTER

MARKET TRENDS AND LEADING PLAYERS IN THE 2019 EDITION OF THE VINITALY OBSERVATORY-NOMISMA WINE MONITOR. ITALY RANKS SECOND ON A GLOBAL SCALE, AFTER FRANCE, THAT TOPS THE 10-BILLION-THRESHOLD.

In 2019, Italian wine exports celebrate ten consecutive record-setting years, posting 6.36 billion euros in value, up by 2.9% over 2018. Italy retains second place among the world's wine-making superpowers, followed by Spain (losing 7%) in third place. France, with a 7.8% leap in sales, strengthens its leading position in the ranking, and breaks through the 10-billion-euro export barrier for the first time, according to estimated described in the Vinitaly Observatory-Nomisma Wine Monitor. Data were presented for the first time in Verona, on the past December, during the wine2wine training and networking event organised by Vinitaly at Veronafiere.

"2019 saw further growth for Italian wine exports, with significant increases on markets such as Japan, where the free trade agreement with the European Union has facilitated trade. This took place against a market scenario that, on the contrary, is dominated by protectionist policies and trade wars that do not benefit growth in exports in the least, Italy included," said Denis Pantini, manager of the Vinitaly Observatory-Nomisma Wine Monitor.

The 'seven sistes of wine'

According to the Observatory, which analysed market trends for the top seven wine exporting countries - namely France, Italy, Spain, Australia, New Zealand, Chile and USA - cross-referenced with flows to the 10 main importer countries, 2019 will close on a positive note for the Italian wine trade, and even more on a global scale. The increase in imports from the 'seven sisters of wine', despite uncertainty as regards duties and economic crises, will be 3.6%, with peaks for New Zealand (+10.2%) and Chile (+5.8%), while Australia (-0.3%) and the USA (-3.7%) will post downturns.

Export vinicolo: l'Italia può fare meglio

Cresce del 2,9%, nel 2019, l'export di vino italiano, con un controvalore di 6,36 miliardi di euro. Il Bel Paese si aggiudica così il secondo posto tra le superpotenze enologiche mondiali, dopo la Francia e prima della Spagna. Le stime, contenute nell'Osservatorio Vinitaly-Nomisma Wine Monitor, evidenziano che nel 2019 le 'sette sorelle del vino' (Francia, Italia, Spagna, Australia, Nuova Zelanda, Cile, Usa) metteranno a segno un +3,6% complessivo. Per l'Italia, recuperano i vini fermi (+3,3%), rallentano gli sparkling (+5,8%) e calano gli sfusi (-10%). Sul fronte delle destinazioni, la domanda di vino italiano vedrà il Giappone campione di crescita (+17%), seguito dalla Russia (+11,1%) e dal Canada (+6,2%). Bene gli Usa (+5%), primo mercato al mondo, mentre in negativo la Gran Bretagna (-2,8%), la Svezia (-0,8%) e la Cina (-3,8%).

Italy ranks second place globally

According to the report, Italy's performance suggests that there is still significant room for improvement, starting from the average price (down by 2%) through to greater reactivity on emerging markets and less dependence on increasingly mature historic markets (Germany and United Kingdom).

Overall, Italian still wines are expected to experience a significant recovery (+3.3%), while sparkling wines - the frontrunners in recent years - will 'slow down' to +5.8%, again in the wake of contraction on the UK market. Falling prices, instead, penalise bulk wine (-10%). More in detail, demand for Italian wine will see Japan in the forefront in terms of growth, with an increase in value of more than 17% to almost 200 million euros, followed by Russia - making a strong recovery

(+11.1%) even after last year's good performance - and Canada (+6.2%). The USA, n.1 global wine market, will perform well (+5%) at around 1.8 billion euros, although the increase will be lower than the average for overall imports (+7.5%) and above all the +11.4% performance achieved by France (very close to 2 billion euros). "The race to purchase products before additional pre-duties are applied will be a favourable circumstance," the report says. Great Britain was down 2.8%, following a sharp decrease in the demand for Italian sparkling wines, as well as Sweden (-0.8%) and China (-3.8%), where, nonetheless, Italy will perform better than average as regards Chinese imports thanks to a good recovery in the second half year.

The Asian 'big deal'

"Market analysis reveal a highly competitive snapshot in this sector. Competition has grown in direct proportion to a business sector increasingly crucial for the economies of individual countries," said Giovanni Mantovani, Ceo of Veronafiere. "There is no need to say that Asia will play a key role in this game - he added - where we aim to work with determination and decisiveness. We have set up a joint company - Shenzhen Baina International Exhibition - with our Chinese partners to organise WineToAsia scheduled 9-11 November 2020 in the new Shenzhen World exhibition centre." WineToAsia is a b2b event. The first edition envisages attendance by 400 exhibitors and from the outset will have an international scope, by attracting Italian and European companies as well as others from China and the New World.

IMPORTS 2019: 2ND YEAR OF DROP FOR CHINA. GERMANY IS ALSO DECREASING. RUSSIA & JAPAN ON A GROWING TREND

VAR % 2018/17	WINE IMPORT (MLN EURO, 2019)	VAR % 2019/18
+0.3%	Usa 5,641	+7.5%
+1.9%	UK 3,833	+8.4%
+4.4%	Germany 2,601	-3.1%
-2.1%	China 2,188	-9.4%
+1.5%	Canada 1,750	+3.4%
+0.7%	Japan 1,644	+15.9%
+0.2%	Switzerland 1,080	+5.4%
+1.7%	Russia 1,014	+13.3%
+3.1%	Sweden 685	+3.5%
-1.7%	Brazil 333	+4.3%

Source: Vinitaly Observatory - Nomisma Wine Monitor

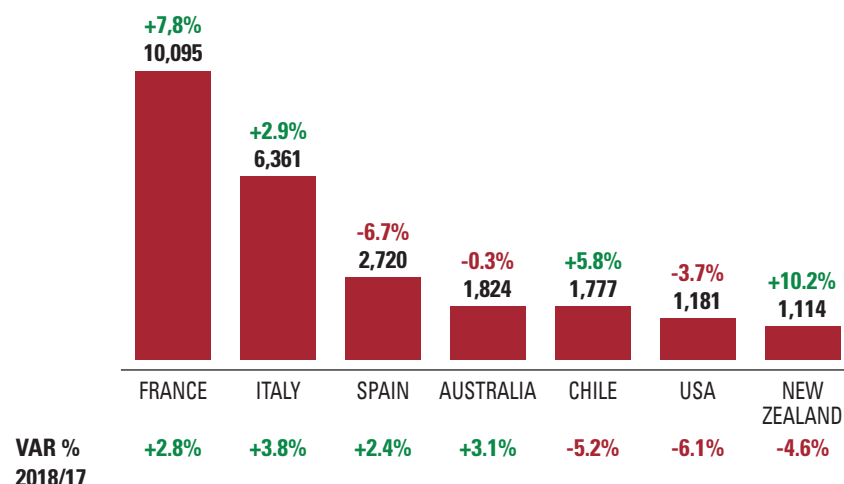
IMPORTS FROM ITALY: DOWNTURN FOR UK, CHINA AND SWEDEN. JAPAN AND RUSSIA ON A RISING NOTE

VAR % 2018/17	WINE IMPORT FROM ITALY (MLN EURO, 2019)	VAR % 2019/18
+2.1%	Usa 1,763	+5.0%
+4.7%	Germany 970	+3.0%
+4.5%	UK 727	-2.8%
-1.0%	Switzerland 378	+2.9%
+0.7%	Canada 376	+6.2%
+3.9%	Russia 294	+11.1%
-2.8%	Japan 195	+17.3%
+1.1%	Sweden 160	-0.8%
-0.2%	China 137	-3.8%
+0.2%	Brazil 35	+0.7%

Source: Vinitaly Observatory - Nomisma Wine Monitor



TOP EXPORTERS: FRANCE RETAINS LEADERSHIP. ITALY WIDENS THE GAP WITH COMPETITORS



Source: Vinitaly Observatory - Nomisma Wine Monitor

STILL WINE IMPORTS FROM ITALY: IMPROVING RESULTS OVER 2018

VAR % 2018/17	WINE IMPORT FROM ITALY (MLN EURO, 2019)	VAR % 2019/18
-0.5%	Usa 1,306	+3.1%
+1.9%	Germany 718	+7.3%
0%	UK 393	+2.0%
+0.1%	Canada 318	+5.7%
-2.7%	Switzerland 287	+3.9%
-3.2%	Russia 185	+13.9%
-4.0%	Japan 150	+15.2%
+1.0%	China 116	-6.4%
+1.0%	Sweden 94	+0.9%
+0.1%	Brazil 30	+2.4%

Source: Vinitaly Observatory - Nomisma Wine Monitor

IMPORT OF SPARKLING WINES FROM ITALY: A DECREASE REGISTERED IN MATURE MARKETS

VAR % 2018/17	WINE IMPORT FROM ITALY (MLN EURO, 2019)	VAR % 2019/18
+11.6%	Usa 427	+13.4%
+10.8%	UK 318	-6.4%
+17.6%	Russia 111	+13.0%
+1.5%	Germany 87	-2.1%
+8.3%	Switzerland 61	+4.3%
+8.8%	Canada 51	+13.2%
+36.0%	Sweden 43	+0.7%
+2.1%	Japan 41	+26.2%
-5.7%	China 19	+9.9%
+1.0%	Brazil 4	-11.4%

Source: Vinitaly Observatory - Nomisma Wine Monitor

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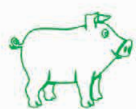
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COMING SOON



ALIMENTARIA GETS A

THE 2020 EDITION OF THE SPANISH AGRI-FOOD TRADE FAIR WAS PRESENTED ON DECEMBER 13TH. FOCUS ON LOCAL PRODUCTS' QUALITY AND SECTOR'S TRENDS. A NEW SYNERGY WITH HOSTELCO. RENDEZVOUS IN BARCELONA FROM APRIL 20TH TO 23RD.

Save the date: Barcelona, April 20th to 23rd 2020. The Spanish wine and food sector and its quality will be on stage. With special attention to the whole supply chain, from the primary sector and services, to the food trends' evolution and consumers' needs. Besides premium products and foreign gastronomy. It's Alimentaria, one of the main trade fairs at a global level for food professionals. That was presented to the foreign press on Friday December, 13th at Cosmo Caixa, the science museum of Barcelona. A fascinating place, at the foot of the Collserola, which, given the sunny day, stroke participants right away. Many figures were present at the event: Josep Lluís Bonet, president of the organization committee of Alimentaria; Teresa Hordà i Roura, minister of Agriculture of the Autonomous Community of Catalonia, and Cristina Clemente, deputy director of the Spanish ministry of Agriculture; Mauricio García de Quevedo, director of the industrials' association for the food and beverage sector; and the director of Alimentaria José Antonio Valls.

Watchword: quality

Josep Lluís Bonet opened the press conference. And was immediately followed by Teresa Hordà and Cristina Clemente, who highlighted the importance of the agri-food sector for the Spanish and Catalan economy, focusing on local products and the Mediterranean diet. And on the variety of products, which reflected the cultural identity of each Spanish region. Watchword in both the speeches: quality. Which is promoted and spread by the chefs, who will be protagonist in 2020 in the area The Experience Live Gastronomy. It is not by chance that the Spanish agri-food sector, in 2018, was worth 30 billion euros. And that the food and beverage sector generates 3% of the gross domestic products of the Country. In fact, production in 2018 was worth 115 billion euros and over 32 billion active companies employ 506 thousand workers. Therefore, it is "a consolidated, stable and strategic sec-

Alimentaria ci prende gusto

Presentata il 13 dicembre la fiera spagnola dell'agroalimentare. L'edizione 2020 ruoterà attorno a quattro pilastri: innovazione, gastronomia, verticalità e internazionalizzazione, che saranno declinati nel format arricchito della fiera. Focus sulla qualità del prodotto locale e sulle tendenze del settore. Rinnovata la sinergia con Hostelco, che avrà un design rinnovato per creare una nuova sinergia con Restaurama. Appuntamento a Barcellona dal 20 al 23 aprile.

tor for Spain, that has the fundamental role of providing safe and quality products", as Mauricio García de Quevedo emphasized.

A mirror of the present and the future

A mirror-covered egg. Which reflects people moving in an urban scenery. It is the logo representing Alimentaria 2020, that was described by Antonio Valls in his closing speech, while explaining the concept of the 2020 edition of the fair which will take place in Barcelona. "The image is inspired by the city of Chicago and represents what Alimentaria aspires to be: a mirror of how consumers' needs evolve. This is the reason why, during the fair, present and future food trends will be explored in some devoted areas: Alimentaria Trends and The Alimentaria Hub", Valls explain. The first will display free-from products, for those suffering from allergies, and organic food, as well as 'honest food' and local productions, halal productions and functional foods. With special attention to taste. Today's consumer, in fact, searches more and more often for gourmet products, that must be easy and fast to consume. In The Hub, instead, over 100 experts will meet to deliver conferences, presentations and round tables on innovation, health and well-being, globalization and nutrition. The evolution of food service will be under the spotlight, given the increasing number of food delivery services, as well as retail transformation with supermarkets' digitalization. Focus on sustainability too.

One fair, ten areas

"You will never see an edition of Alimentaria identical to the previous one. We want to constantly renovate it. In fact, the 2020 edition will be structured on four pillars: innovation, gastronomy, verticality and internationalization. That will be declined in the even richer format of the fair, a key window to showcase Spanish products", Antonio Valls explained, confirming the vertical structure of the next edition of Alimentaria. Thus, its offer will be distributed among ten different sectors: Intercarn (meat), Interlact (dairy), Expoconser (preserves) and Snacks, Biscuits & Confectionery (sweets and snacks). There will also be Mediterranean Foods, the area reserved to Mediterranean products, such as olive oils and other vegetal oils, and Restaurama, which is dedicated to the food service. In addition, there will also be the Grocery Foods area, that will bring together the main consumer goods companies. Then, Lands of Spain and Premium will give space to national production of the various Spanish autonomous communities and to gourmet products. While International Pavilions will host international productions, especially Italian, German, Portuguese, Belgian and Romanian exhibitors, but also producers from South America and Asia. In addition, for the first time, Greece, Canada and Japan will be present too.

More and more international

Alimentaria 2020 will be more and more international. Also from the participants' origin side. In fact, Alimentaria aims to increase the levels of internationalization of them previous edition, which welcomed 4,500 exhibiting companies from 70 countries, and around 150 thousand visitors, 30% of the international, from 156 countries. For this reason 680 buyers, importers and distributors from all over the world have been chosen. One third of them come from Asia, mainly from China, Hong Kong, South Korea and Japan. Europe, instead, is the second most represented con-





continent, immediately followed by North America (United States, Canada and Mexico). Also a goodly number of professionals from Latin America, Africa, New Zealand and Australia will participate at Alimentaria 2020.

More space for the Horeca sector

Finally, the areas devoted to hotels and restaurants were disclosed. Hostelco, the international trade fair for equipment for catering, hospitality and collectives, is confirmed for the second time. It will have a renovated design to create a new synergy with Restaurama, the area of Alimentaria devoted to food service. Therefore, it will be the second largest platform for products and services for the hospitality sectors. Hostelco and Re-

staurama will cover over 30 thousand square metres, a major part of which will be made up of the fully equipped sector, with catering equipment and machinery. While products and equipment related to coffee, pastries, bakery items, pizza and ice cream will be showcased in the Moments area. Atmosphere, instead, will be the true novelty of 2020: an area dedicated exclusively to the creation of environments and interior design for hotel establishments, restaurants, cafés and other areas of the hospitality sector.

A chance to taste

As a showcase of the Spanish agri-food sector, Alimentaria will provide many occasions to taste local products: from the Olive Oil Bar

to The Experience Live Gastronomy, an event where many top chefs will be present - Elena Arzak, Paolo Casagrande, Oriol Castro, Eduard Xatruch, Fina Puigdevall and Mario Sandoval, to name some. In the course of cooking shows and workshops, they will enhance local products and will allow visitors to discover traditional dishes, highlighting their sustainability.

Thus, Alimentaria 2020 will have a rich and varied offer. A 360 degrees presentation of anything the Spanish food and wine sector can provide, both to the retail trade and the Horeca sector. The willingness to make it an international point of reference for the agri-food sector is clear. Rendezvous in April to find out whether it will be so or not.

Dear inventors, when you will create an image able to infuse aroma and taste, this page will be the most appreciated advertisement in the world. Today we can only tell you how delicious the Blu di Grotta is.



KOELNMESSE: A 3.0 FUTURE

THE MODERNISATION PROGRAMME STARTED IN 2015. WITH MORE PARKING SPACES AND DIGITAL SERVICES, BESIDES THREE NEW BUILDINGS. A 700 MILLION EUROS INVESTMENT TO PROJECT THE COLOGNE FAIR INTO THE FUTURE.

Koelnmesse is undergoing radical changes. And is getting ready to embrace the future. Almost one century after its foundation, the Cologne trade fair is modernising its buildings to become more hospitable, sustainable and efficient. The project is called Koelnmesse 3.0. And was conceived to meet the requirements of organizers, exhibitors and visitors and to make Koelnmesse the most attractive exhibition centre in the world. Since the first event in 1924, it has become the third trade centre in Germany in terms of exhibition ground and organises some of the main trade events in the Country and in the world. For the food sector only, it hosts Anuga, Ism and ProSweets. While, in Italy, it collaborates to key events such as Cibus Tec. Four years after the launch of the 700 million euros project, which is the most complete ever, the trade fair has already given a taste of its future and is about to enter the most significant phase of its 3.0 evolution, which will come to light in the next ten years.

Modernisation and sustainability

More accessible and attractive events. In comfortable and sustainable buildings. Koelnmesse 3.0 is a very topical project: it reflects the increasing attention to environmental issues. The new exhibition centre, in fact, blends harmoniously into the area where it is located, the centre of Cologne. The project encompasses several and different interventions: the modernisation of the exhibition grounds, improvement of the traffic routes, new entrances and buildings. Moreover, the new combined heat and power plant, the use of district heating, energy-saving ventilation of the halls, besides better insulation a led lighting system, the Cologne trade fair will be able to reduce its emissions by 3,200 tons of CO2 per year.

Part of the projects of Ko-

Koelnmesse: un futuro 3.0

Koelnmesse si rinnova e cambia volto. A quasi un secolo dalla sua fondazione, la fiera di Colonia si fa più accogliente, sostenibile ed efficiente. Il progetto di modernizzazione, avviato nel 2015, si chiama Koelnmesse 3.0 ed è stato creato con l'obiettivo di soddisfare le necessità e le richieste di organizzatori, espositori e visitatori. Il progetto prevede più parcheggi e servizi digitali, oltre a modifiche delle modalità e delle vie d'accesso per una migliore gestione del traffico. Inoltre, nei prossimi anni, vedranno la luce anche tre nuovi edifici: Hall1 Plus, Confex e Terminal. Koelnmesse 3.0 renderà la fiera di Colonia più moderna e versatile. Un investimento da 700 milioni di euro che la proietterà nel futuro.

THE NEW BUILDINGS

HALL1 PLUS

The new hall, which is currently under construction, will be located next to the west entrance. Having new attractions and functionalities, it will further increase the quality of the events and the efficiency of the exhibition ground, that will cover 10 thousand square metres. The area, which will be ready in 2020, is flexible and easily convertible. For this reason it can host many different types of event – trade fairs, exhibitions, but also shows – with up to 4 thousand participants.



CONFEX

Confex is being created to make completely new and customised events, fusing trade fairs with conferences. In such a space, current topics can be addressed through a great variety of experiences and new trade fair formats will be designed and realised with the flexible use of the twelve conference rooms, in combination with Hall1 Plus. Thus, Koelnmesse's convention capacity will be increased by a further 5 thousand participants.



TERMINAL

Terminal, which will be built between 2021 and 2023, will connect the various entrances and halls and will make it possible to use the exhibition areas more flexibly. It will be a liveable place to meet and rest, with restaurants, shops, relax areas and presentation rooms.



elnmesse 3.0 have already been realised, others are under construction, some will come to light in the following years and will be finished within 2030. The multi-storey car park, which is located next to the exhibition area, has already been finished. Besides having 3,260 additional parking spaces, it provides extensive logistics space for vehicles involved in assembly and disassembly, in order to reduce traffic along the Rhine. In addition, the digital traffic management system allows to organise trucks' access to the exhibition ground without waiting times and backlogs. Signage in the halls is digital as well. Unveiled for the first time on the occasion of Gamescon 2018, it is a valuable communication tool for infotainment and marketing activities. And is part of a much wider digitalisation project started by the Cologne trade fair to provide exhibitors and visitors with up-with-the-times services, including 5G, indoor navigation and the 'smart venue'.

Not only additional services will be provided and new structures will be built – the Hall1 Plus, Confex and Terminal –, the already existing ones will be modernised too. South halls will be completely renovated and will be more spacious and airy, with a new lighting, conditioning and sound system to make it more comfortable. Moreover, footpaths and green areas are being restored, as well as the facades of halls 10 and 11. Finally, in 2020, a pedestrian bridge connecting the multi-storey car park with the exhibition grounds will be completed.

Multifunctional, digital, communicative and smart, this is how Koelnmesse will be in the future. More than a simple place to meet and do business, the Cologne trade fair will offer real experiences and provide food for thought. A more and more modern and versatile area to give space to tomorrow's ideas.

WHAT'S TRENDING IN 2020

TOP 10 FOOD CRAZES TO LOOK FOR THIS YEAR, ACCORDING TO WHOLE FOODS MARKET. FROM REGENERATIVE AGRICULTURE TO WEST AFRICAN CUISINE, FROM FRESH SNACKS TO MEAT-PLANT BLENDS.

The U.S. grocery retailer Whole Foods Market unveiled its annual list of food trends to watch for in 2020. This is the result of the combined work carried out by more than 50 Whole Foods Market staff members including culinary experts, local foragers, regional and global buyers operating across the retailer's global offices and across its

490 stores. The list is mainly based on consumer preferences data and their own product sourcing experiences. This year, in addition to trends toward health and wellness that continue to lead the way, Whole Foods has identified a "new crop of flavors and products" that we will find soon on grocery store shelves.

I 10 trend alimentari del 2020, secondo Whole Foods Market

Dall'agricoltura rigenerativa ai piatti dell'Africa Occidentale, dagli snack 'freschi' ai blend di carne e vegetali. Sono solo alcuni dei trend alimentari destinati a ritagliarsi una fetta di mercato nel 2020, almeno secondo la lista stilata dal colosso del retail Usa Whole Foods Market.

WHOLE FOODS MARKET TOP 10 FOOD TRENDS

1

REGENERATIVE AGRICULTURE

Farmers, producers, retailers and more are taking a closer look at how to use land and animal management practices to improve soil health and sequester carbon. While the term "regenerative agriculture" can have many definitions, in general it describes farming and grazing practices that restore degraded soil, improve biodiversity and increase carbon capture to create long-lasting environmental benefits.

2

FLOUR POWER

An array of interesting flours is entering the market making baking more inclusive and adventurous. 2020 will bring more interesting fruit and vegetable flours (like banana) into home pantries, with products like cauliflower flour in bulk and baking aisles, rather than already baked into crusts and snack products.

3

FOODS FROM WEST AFRICA

Traditional West African flavors are popping up everywhere in food and in beverage. The trio of tomatoes, onions and chili peppers form a base for many West African dishes, and peanuts, ginger and lemongrass are all common additions. Brands are looking to West Africa for its superfoods too like moringa and tamarind, and lesser-known cereal grains sorghum, fonio, teff and millet.

4

OUT-OF-THE-BOX, INTO-THE-FRIDGE SNACKING

Gone are the days when the only options were granola bars and mini pretzel bags. The keyword is "fresh", since the refrigerated section is filling up with the kind of wholesome, fresh snacks typically prepared and portioned in advance at home all perfectly portioned and in convenient single-serve packaging. Even nutrition bars have made their way from the shelves to the chiller, thanks to the addition of fresh fruits and vegetables.

5

PLANT-BASED, BEYOND SOY

In 2020, the trendiest brands are slowing down on soy, which has traditionally dominated the plant-based protein space. They will be replacing it with innovative blends (like grains and mung beans) to mimic the creamy textures of yogurts and other dairy products. In the supplement aisle, brands are swapping soy for hempseed, pumpkin, avocado. As the plant-based movement gains traction with flexitarian eaters, brands are looking to avoid as many of the top allergens as possible.

6

EVERYTHING BUTTERS AND SPREADS

Has been made into a butter yet? It's likely to happen in 2020. From pumpkin butter to chickpea butter or watermelon seed butter: consumers are looking for creamy vegan spreads perfect for toast, crackers, bagels and celery sticks that get their full flavors from trending superfoods like pili. Many brands are looking to either eliminate the use of palm oil. Transparency is also a key player in this trend.

7

RETHINKING THE KIDS' MENU

By 2026, 80% of millennials will have children, and many parents are introducing their kids to more adventurous foods. Food brands are taking notice and bridging the gap from old-school basic kids' menus and taking more sophisticated younger palates into consideration. Think of non-breaded salmon fish sticks, organic chicken nuggets, pastas made from alternative flours and more.

8

NOT-SO-SIMPLE SUGARS

For those seeking sweetness outside of the usual suspects like sugar, stevia, honey and maple syrup, there's lots more to choose from. Syrupy reductions from sweet potato, sorghum, and dates will pop up as ways to add a touch of sweetness to dessert recipes and even meat glazes and marinades.



9

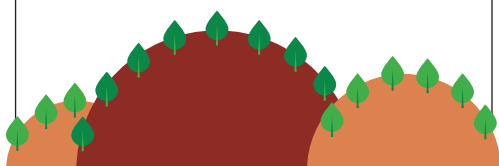
MEAT-PLANT BLENDS

Butchers and meat brands won't be left out of the "plant-based" craze in 2020, but they're not going vegetarian. Chefs across the country have been on board with the trend for years through James Beard Foundation's 'The Blended Burger Project', a movement that strives to make the iconic burger "better for customers and for the planet" by blending in at least 25% fresh mushrooms. Flexitarians looking to strike a tasty balance between meats and plants can expect more blended products in their future.

10

ZERO-PROOF DRINKS

With so many consumers seeking out alternatives to alcohol, unique non-alcoholic options are popping up everywhere. Many of these beverages seek to re-create classic cocktail flavors using distilling methods typically reserved for alcohol. Think alt-gin for gin and tonics and botanical-infused faux spirits for a faux martini.



ASIA PACIFIC: A DYNAMIC RETAILING LANDSCAPE

GROCERY, NON-GROCERY AND E-COMMERCE PLAYERS ARE RESHAPING THE LOCAL SCENARIO. WHICH IS CHARACTERIZED BY A MORE URBANIZED AND WEALTHIER POPULATION, WILLING TO EMBRACE A MODERN LIFESTYLE. EUROMONITOR INTERNATIONAL'S MARKET RESEARCH SHOWS THE REGION'S LEADING PLAYERS IN 2018.

The world of retail in Asia Pacific is changing at a fast pace, as highlighted by Euromonitor International's latest market research dedicated to the performances of leading grocery, non-grocery and online retail players in 2018. A region that is undergoing tremendous changes and growth, and where consumers' attitudes to shopping were impacted by four major transformations, according to Euromonitor's market experts: urbanisation, more single households, ageing and increasing wealth.

In 2018, Asia Pacific ranked second in urban population absolute growth, behind the Middle East and Africa. Between 2018 and 2023, the urban population will grow faster than any other region in the world. This is being driven mainly by three countries: China, India and Indonesia. The urbanisation trend goes alongside with a big change away from households with children to households with a single person or a couple without children, especially in Southeast Asia and China.

In addition, over 2018 and 2023 Asian households will become wealthier. Indonesia, Malaysia and India in particular will experience very fast growth in median household disposable income. This is one of the many reasons why such markets remain in the focus of large retailers' expansion plans. India and China combined accounted for some 93% of absolute growth in retail sales in Asia Pacific between 2014 and 2018.

As a result, the face of retailing is also changing. While traditional grocery remains strong in emerging Asian economies, more consumers are turning to modern formats, especially forecourt retail and convenience stores. However, the major shift is away from the physical store as shoppers become more comfortable with buying non-grocery products online. One of the major reasons why digital commerce has grown and will continue to do so

is the rise of the marketplace model. In addition to offering a very wide selection, large marketplaces such as Alibaba, JD.com and Rakuten have brought security to payments and reliability to delivery. In 2018, 47% of all digital commerce sales were made through the marketplace model, up from 27% in 2009.

Grocery retailers: the 'comeback' of convenient stores

The region's heavily fragmented markets promise an accelerated growth opportunity for modern and traditional grocery retailers alike. The robust expansion in grocery is driven by the burgeoning population, rising disposable income, smaller households, expansion of store networks, new convenient formats such as internet retailing and hyper connectivity with penetration of internet and digital devices.

The shrinking size of the households led to a shift in grocery shopping with consumers refraining from bulk purchases and preferring high frequency buy-as-you-need and top-ups. The time-pressed consumers are turning to smaller convenient stores and online grocery retailers to avoid the hassle of long queues of large format hypermarkets and supermarkets and busy traffic in densely-populated urban cities.

Hyper connectivity, immediacy and transparency are influencing the consumers when it comes to grocery retailing. Proliferation of digital media has made information and interaction between brands and consumers more accessible and transparent. Retailers are turning to digital channels and integrating physical and online stores to capture all segments of consumers through their omnichannel strategy. In addition, modern retailers look to local product expertise and vary their approach towards assortments, combos, and promotional offers to resonate with local tastes and preferences.

FOCUS ON CHINA

Overall retailing in China maintained robust growth in 2018, driven by the value growth in convenience stores, non-grocery retailers and internet retailing. Convenience stores experienced double-digit value growth and show great market potential, especially in first- and second-tier cities in China. As a new generation of consumers becomes the major workforce, convenience stores are gaining popularity with advantages of location and offering unique product categories to meet daily essentials. Driven by consumers' increasing demands for experience, non-grocery retailers are focusing on in-store service improvements to adapt to changing consumer habits. Meanwhile, e-commerce players have expanded their footprints into new offline formats and penetrated to lower-tier

cities to expand their consumer base. With profound evolution of the retail environment, consumers' demands have shifted vastly. They are putting greater value on convenient, fresh, high-quality and personalised products and services. The fast development of internet retailing has dramatically changed consumer shopping habits and contributed to the prevalence of new retail formats. New business models such as Hema, 7Fresh and Super Species offer fine dining and a social environment for after-work gatherings. Meanwhile, e-commerce players are now expanding their businesses to integrate with traditional retailers to build data-driven businesses, focusing on consumer experiences and maximising operational efficiency.

TOP 10 COMPANIES WITHIN RETAILING IN CHINA

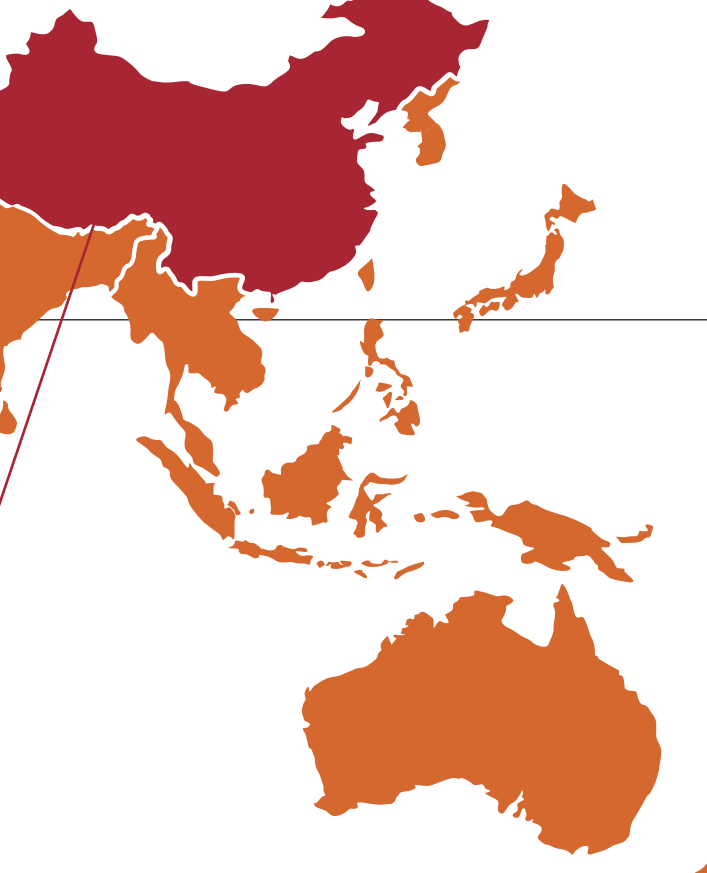
Global Brand Owner	2018 Rank	2017 acts (US\$ Million)	2018 acts (US\$ Million)
Alibaba Group Holding Ltd	1	194,929	240,794
JD.com Inc	2	142,636	201,047
Suning Commerce Group Co Ltd	3	29,192	38,985
GOME Electrical Appliances Holding Ltd	4	15,976	19,454
Vipshop Holdings Ltd	5	12,842	15,854
Auchan Group SA	6	14,614	15,650
Cina Resources Holdings Co Ltd	7	15,241	15,538
Pinduoduo Inc	8	4,293	13,649
Walmart Inc	9	11,193	12,406
Yonghui Superstores Group	10	8,120	9,089

Improvement No Change Worsened

Source: Euromonitor International

Asia Pacifico: il retail mostra il suo volto più dinamico

Il mondo retail in Asia Pacifico sta vivendo una fase di profondi cambiamenti, come evidenzia uno studio firmato Euromonitor International. Quattro, secondo l'ente di ricerca, i grandi mutamenti in atto a livello sociale che stanno avendo un impatto diretto sulle strategie di sviluppo dei retailer: l'urbanizzazione della popolazione, la presenza di nuclei familiari ridotti, un'età media più avanzata e un maggior benessere economico del ceto medio. L'analisi - che coinvolge tanto il grocery retail tradizionale quanto gli operatori del canale specializzato e dell'e-commerce - evidenzia la 'riscoperta' dei punti vendita di vicinato e la maggior fiducia riposta dai consumatori negli e-tailer.



OTHER RETAILING CHANNELS

Non-grocery specialists

Non-grocery specialists in Asia Pacific are experiencing strong growth driven by the economy and rising income level. China's largest omnichannel smart retailer, Suning, owned by Suning Commerce Group, experienced exceptional growth in its online-to-offline sales in 2018. Suning has over 1,500 technology-driven brick-and-mortar stores and even more physical stores that are connected to its online presence. Even though many non-grocery specialists are shifting to online platforms, offline channels are not eradicated as they still serve customers with tangible services that cannot be replaced online.

Mixed retailers

Mixed retailers in Asia Pacific have shown the most impressive growth in 2018 compared to the last five years, largely attributable to the improved performance of mass merchandisers and the continued solid

performance of variety stores and warehouse clubs in the region. Aeon Group retained its leading position among all types of mixed retailers across Asia Pacific in 2018 due to its firmly rooted foothold in Japan with its mass merchandising format. The region also saw Seven & I Holdings Co Ltd continue its momentum in second place amidst mixed retailers.

Non-store retailing

Non-store retailing sales in Asia Pacific are dominated by the stellar rise of e-commerce, which has eclipsed more traditional non-store channels such as direct selling and home shopping. After the initial boom of e-commerce sales of apparel and other non-grocery segments, consumers in 2018 have expanded their purchases towards groceries as well. As a result, food and drink internet retailing recorded remarkable growth across Asia Pacific, especially in China and South Korea.

TOP 10 COMPANIES WITHIN RETAILING IN ASIA PACIFIC

Global Brand Owner	2018 Rank	2017 acts (US\$ Million)	2018 acts (US\$ Million)
Alibaba Group Holding Ltd	1	196,926	243,519
JD.com Inc	2	142,636	201,047
Seven & I Holdings Co Ltd	3	73,990	77,399
AEON Group	4	65,979	67,965
Amazon.com Inc	5	33,891	40,653
Suning Commerce Group Co Ltd	6	30,348	40,098
Walmart Inc	7	19,726	35,400
Lotte Group	8	26,762	27,413
FamilyMart UNY Holdings Co Ltd	9	25,035	26,471
Shinsegae Co Ltd	10	22,518	25,396

Improvement No Change Worsened

Source: Euromonitor International

TOP 10 COMPANIES WITHIN GROCERY RETAILERS IN ASIA PACIFIC

Global Brand Owner	2018 Rank	2017 acts (US\$ Million)	2018 acts (US\$ Million)
Seven & I Holdings Co Ltd	1	53,135	56,652
FamilyMart UNY Holdings Co Ltd	2	20,361	22,218
AEON Group	3	18,308	18,438
Auchan Group SA	4	15,277	16,344
Laawson Inc	5	15,130	16,290
Cina Resources Holdings Co Ltd	6	15,521	15,724
Shinsegae Co Ltd	7	12,675	13,537
Walmart Inc	8	12,053	13,207
Yonghui Superstores Group	9	8,120	9,089
GS Holdings Corp	10	7,982	8,946

Improvement No Change Worsened

Source: Euromonitor International



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THE PIG DEBACLE

AFRICAN SWINE FEVER HAS SHAKEN GLOBAL MEAT MARKETS. WITH CHINA'S PORK PRODUCTION EXPECTED TO FALL BY 10-15% IN 2020, ON TOP OF THE 25% DROP REGISTERED IN 2019. CURRENT AND FUTURE OUTLOOK IN A REPORT ISSUED BY RABOBANK.

About a quarter of the global pig population is expected to die as a result of an epidemic of African swine fever (Asf). In the last year, the spread of the disease has been particularly devastating in China, home to the world's largest pig population, where the swine fever outbreak has slashed China's hog herd by as much as half since August 2018. The disease continues to wreak havoc in Eastern Europe (see Poland) and is spreading across other Asian countries, such as Vietnam, the world's sixth-largest pork producer. Here, 25% of the country's total pig herd was affected by African swine fever in 2019.

The severity of the crisis means that global pork prices are rising, spurred largely by the demand from China. In the meanwhile, exports to China are booming (US pork sales to the country have doubled), while European pork prices have reached a six-year high. A report issued by Rabobank, a financial services company, predicted that China would lose 55% of its herd by the end of 2019. With pork production expected to slow down between 10 and 15% in 2020. Official figures state that over 1 million pigs have been culled so far. The

country's total consumption of animal feed, such as soy, also dropped by 17% in 2019 due to the decline in hogs, but feed consumption will rebound by 8% in 2020 as hog herds are rebuilt and farmers produce other proteins like chicken.

The pace of herd losses will likely slow in the coming months due to reduced farm numbers and Chinese government measures to control the pig disease. Nevertheless, according to the study, unstable market conditions will likely persist for the next three to five years. And raw material prices will remain firm into 2nd half 2020.

"2020 will be a difficult year, yet not negative as 2019," said Justin Sherrard, Global Strategist Animal Protein at RaboResearch Food & Agribusiness, on the past 26th November in Milan, where an event dedicated to this crisis was held. "This collapse has been extremely severe and unfortunately the illness could spread to other countries. Nevertheless, Asf is not the only trade uncertainty: think of US tariffs to imports or the Brexit effects in Europe, as well as Brazil's desire to enter the EU market with poultry and bovine meat."

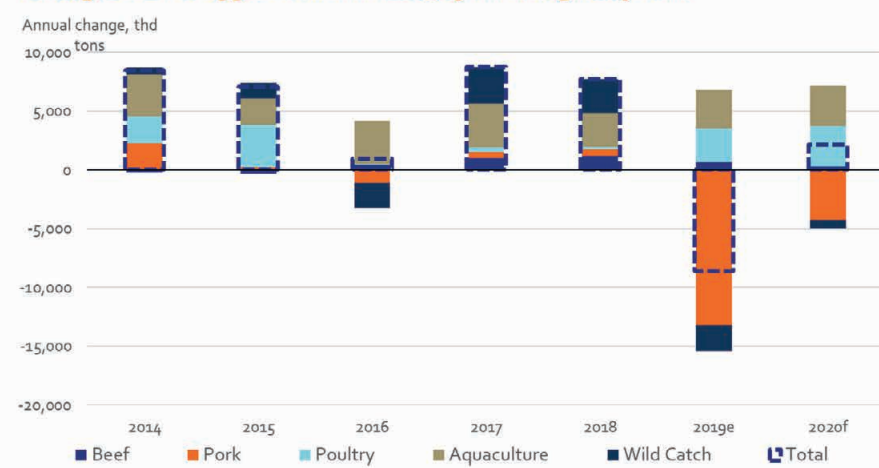
Emergenza suini

Il dilagare della Peste suina africana mette in crisi il mercato mondiale della carne. In Cina, già più di un miliardo di suini sono morti o sono stati abbattuti per contenere l'epidemia. Nel 2020, la produzione di carne suina del Paese dovrebbe calare del 10%-15%, dopo il drastico -25% registrato nel 2019. Il presente e il futuro del settore in un report firmato Rabobank.



Global animal protein outlook changes on pork

Total growth dragged down in 2019 after two good years



Source: USDA, 2019; FAO/OECD, 2019; EU Commission, 2019; Rabobank 2019

Pork production growing everywhere, except in Asia

Production losses in China dominate the picture



Source: USDA, 2019; FAO/OECD, 2019; EU Commission, 2019; Rabobank 2019

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ASF SITUATION IN ASIA (update 5 December 2019)

MONGOLIA

Since its first report on 15 January 2019, 11 outbreaks have been reported, involving 105 farms/households. More than 3,115 pigs, exceeding 10% of the total pig population in Mongolia, have died/been culled due to the ASF outbreaks.

DEMOCRATIC PEOPLE'S REPUBLIC OF KOREA

First ASF outbreak in Chagang-do on 23 May 2019.

REPUBLIC OF KOREA

First ASF outbreak on 17 September 2019. ASF was detected in domestic pigs in 14 farms and in 38 wild pigs from Gyeonggi-do and Gangwon-do. As of 15 November, nearly 450,000 pigs have died/been culled.

CHINA

First ASF outbreak in Liaoning Province, on 3 August 2018. Since then, 163 outbreaks were detected. About 1,193,000 pigs have been culled.

THE PHILIPPINES

First ASF outbreak on 25 July 2019. Since then, a total of 24 ASF outbreaks were detected in nine provinces/cities on Luzon Island. As of 30 November, 497 barangays are said to be affected, for a total of 136,770 pigs.

VIETNAM

First ASF outbreak on 19 February 2019. All 63 provinces/cities reported outbreaks, more than 5,900,000 pigs have been culled.

LAO PEOPLE'S DEMOCRATIC REPUBLIC

First ASF outbreak in Salavan Province on 20 June 2019. More than 165 ASF outbreaks were reported, in all 18 Provinces/city; 39,000 pigs have died or been culled.

CAMBODIA

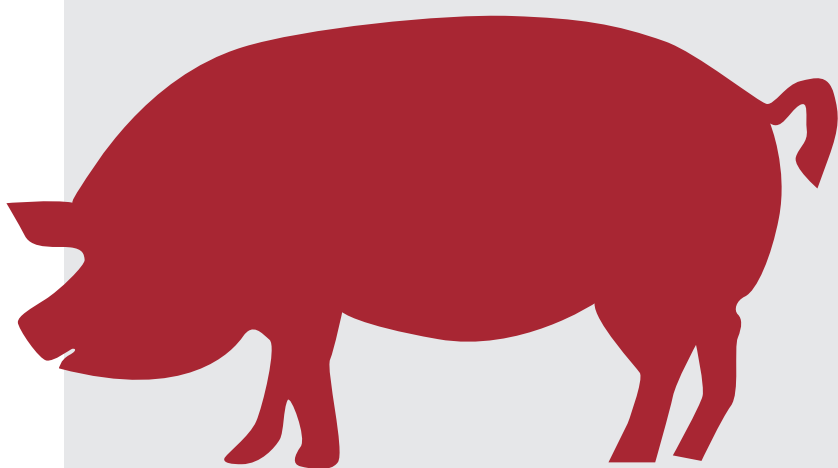
First ASF outbreak in Ratanakiri Province on 2 April 2019. ASF outbreaks were detected in 5 Provinces.

MYANMAR

First ASF outbreak on 1 August 2019. A total of 4 ASF outbreaks were reported in Shan State.

TIMOR-LESTE

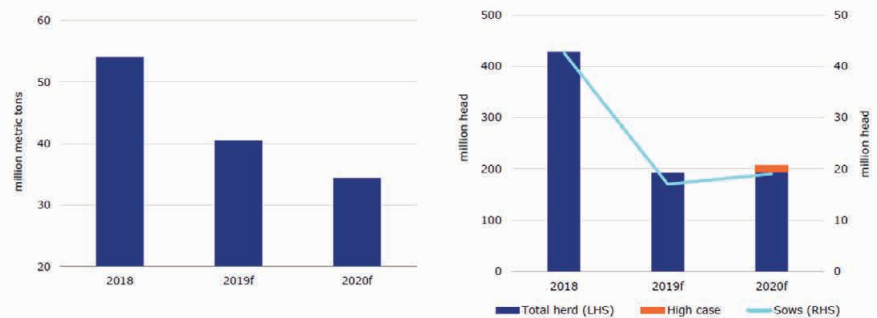
First ASF outbreak on 27 September 2019. A total of 100 outbreaks in smallholder pig farms has been recorded in the capital city, Dili.



China drives the losses

Pork production down 25% in 2019

Herd down 55% in 2019

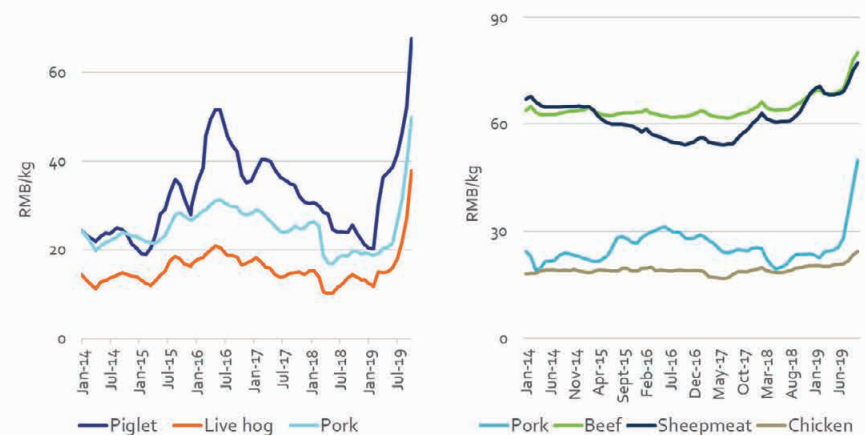


Source: Rabobank, 2019

Prices in China are frightening

Piglet prices signal efforts to re-build

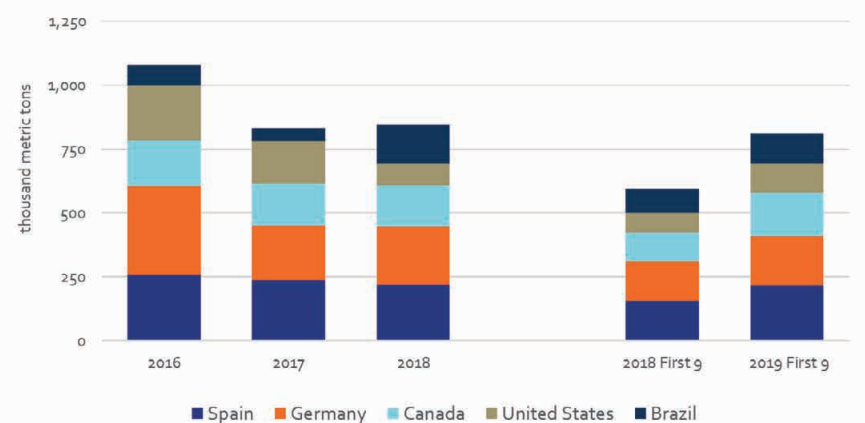
Retail prices are up for all proteins



Source: China MARS, Boyar/Rabobank, 2019

Exports to China are booming, driven by high prices

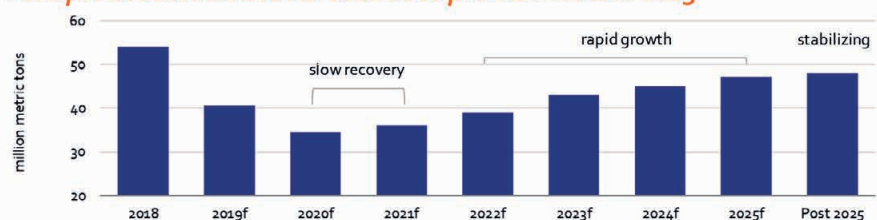
Spain and Germany the biggest winners, but Canada and US grow as well



Source: China Customs, Rabobank 2019

Rebuilding in China to bring change through the 2020s

Pork production to recover but not to pre-ASF level in 2025



Hog-farming is moving towards large-scale commercial farms

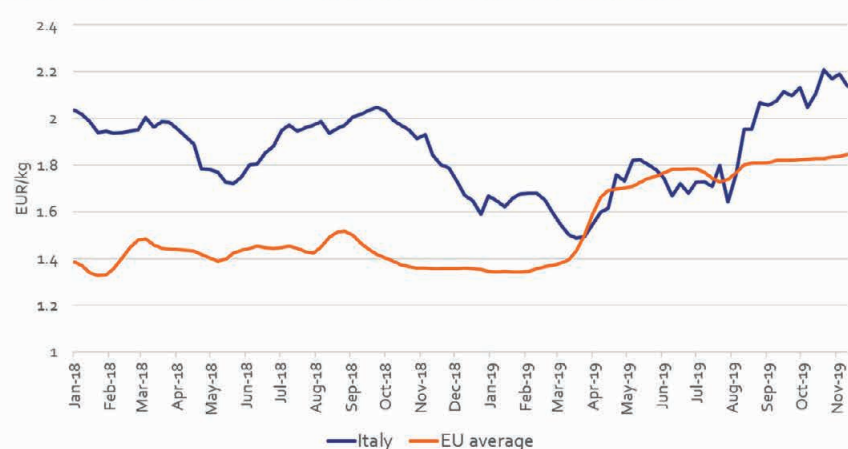


Source: China Statistics Bureau, Rabobank 2019



Rising carcase prices pressure the whole supply chain

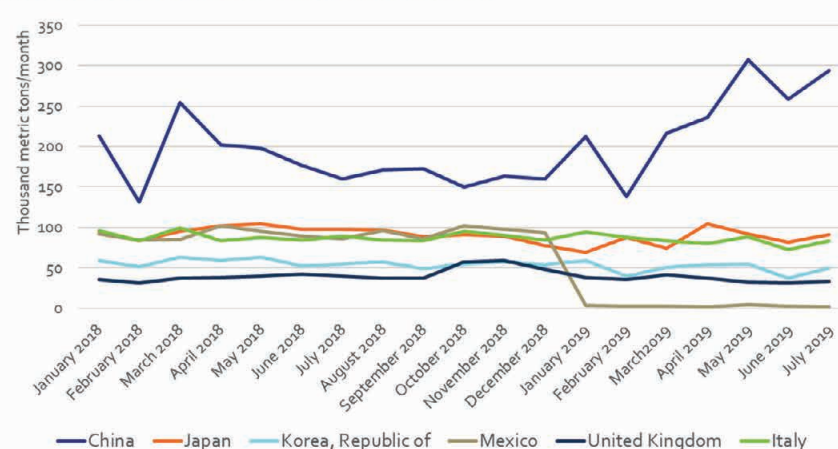
Prices are up everywhere – Italy is particularly challenging



Source: Eurostat, Rabobank 2019

China dominates global pork trade, but Italy also significant

Italy subject to global pricing movements



Source: ITC Trademap, Rabobank 2019

end



Bulgari Agostino srl was founded in **Italy in 1880** by **Bulgari family**, whose members still carry on the long tradition in the confectionery sector. It was originally founded as a handcraft company producing pastries and sugar sweets, over the years it has increased to create a flexible system in order to meet the market needs all over the world. Now Bulgari brand is known all over the world for the production of marshmallow candies and foamy sweets covered with chocolate.

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Francesco Pensabene

RUSSIA WILL NOT OPEN UP TO EU PRODUCTS AT LEAST UNTIL DECEMBER 2020. BUT HOW HAS THE OVERALL SCENARIO CHANGED? WE TALKED ABOUT THE FUTURE OF OUR EXPORTS TO THE COUNTRY WITH FRANCESCO PENSABENE, DIRECTOR OF THE ITA OFFICE IN MOSCOW.



What do Russian people miss the most about made in Italy, after the embargo imposed by President Vladimir Putin? There is one thing that they probably miss more than 'cappuccino', that is our cheese. Sanctions imposed by Europe in 2014, after the annexation of Crimea by the Russian Federation and the immediate Russian response, with a trade embargo on several EU goods, have cancelled the export of a long series of European food products - cheeses included. According to the data collected by the Italian Trade Agency (ITA) in 2013 - the last year before the embargo came into force - Italian exports to Russia were worth over 1 billion euro. In the Federation, EU goods have gradually disappeared from the shelves, with important consequences for both

foreign suppliers and local distributors.

In detail, the cheese export ban was extended to all Europe and affected the yearly trade of around 30,000 tons of butter (30% of total EU butter exports), 257,000 tons of cheese (33%), 21,000 tons of skim milk powder and 26,000 tons of whey powder, equal to 1.4 billion euro. Finland, the Netherlands, Lithuania, Poland and Jamaica, as well as Italy, were the most affected in Europe. According to a 2019 report of the ITA Agency, between 2014 and 2015 Italian f&b exports to Russia were down by 165 million euro for fresh fruit & vegetables, 70 million euro for the dairy sector and 38 million euro for meats and cured meats. But what would happen if by the end of 2020 Putin decided to lift the embargo?

How has changed the Russian market

The ITA report points out how importers had to "replace a large number of suppliers in a very short time, including many long-term partners." A 'traumatic' process for many, which led to a sharp downsizing of structures and, in general, a contraction in turnover of 30-40%. Today, the situation has stabilized, but many things have changed since 2014. Two important factors must be taken into great account for future exports: the development of a stronger national production in order to meet domestic demand; and the presence of a variety of 'Italian sounding' imitations.

The domestic demand remains a key factor. In 2018, Minister of Agriculture Aleksandr Tkachev claimed that, in order to reach self-sufficiency, Russia should have built 800 dairy companies. On the following

year, the Russian government presented a 75-million-euro project for the creation of a specialized center for the production of dairy products 12 km away from Moscow: seven plants on 17 hectares able to produce 12,000 tons of cheese a year. A huge project, whose goal was to attract foreign partners and, most of all, their know-how. Production volumes are not such a great issue for the Federation, yet quality is a big problem. A quality - that of EU and Italian products - which is difficult to replicate.

Nostalgia del made in Italy... o no?

Le sanzioni imposte dall'Unione europea nel 2014 in seguito all'annessione della Crimea e poi l'immediata risposta russa, con un embargo posto su numerosi prodotti europei, hanno azzerato le esportazioni di diverse categorie merceologiche, formaggi inclusi. Merci venute progressivamente a mancare, la cui carenza ha rappresentato un motivo di criticità non solo per i produttori italiani coinvolti, ma anche per tutti gli operatori specializzati a monte e a valle della catena distributiva. A fine 2020, potrebbe verificarsi una riapertura del mercato russo. Ma com'è cambiato, nel frattempo, il contesto? Ne abbiamo parlato con Francesco Pensabene, direttore dell'Ice di Mosca.





THE INTERVIEW

Italian exports of dairy products, meat, fruit&vegetables and fish have been affected the most. Nevertheless, other food categories not included in the embargo have experienced strong growth. In detail, in the first nine months of 2019 exports to Russia of bakery products were up by 9.3%, ground coffee by 20.5% and Evo oil by 12.5%. We talked about the current and future market outlook with Francesco Pensabene, director of the ITA Agency in Moscow.

Which is the current situation of our export to the Federation?

In 2018, Russian food imports from Italy were worth 870 million euro. Our country is Russia's seventh largest suppliers on a global scale, and the second among other European countries: after

Germany and followed by France. Data collected in the first nine months of 2019 are also very encouraging: our exports reached a value of 600 million euro. This means that, despite the embargo, Italian food & wine companies still have big growth possibilities in this market.

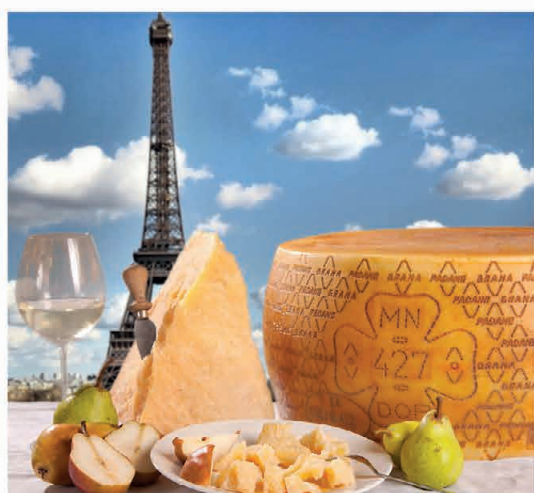
How much has increased the domestic production of milk and dairy products?

According to the data provided by the local producers' association, in 2016 the volume of cheeses produced in the Russian Federation amounted to 600,000 tons and covered about 70% of consumption. In 2018, local production grew to 670,000 tons, while consumption reached 856,000 tons. About 75% of the domestic demand is met by local producers, while the remaining 25% by imports. At the end of 2018, in Russia 917 dairies of small,

medium and large size were registered. The final figures for 2019 are not yet available, but according to the forecasts of the Union of Milk Producers (Souzmoloko) the number should increase. Production is mainly concentrated in the Central Federal District and the Volga Federal District: 20 big companies are responsible for 85% of production.

If the embargo is lifted, why should Russians start importing again from Europe?

Russian consumers have an outstanding image of Italian food and cuisine. To them, Italian products are associated with a pleasant, sophisticated and healthy lifestyle. It is important to noticed that Italian cuisine ranks third among Russians' most favorite cuisines globally, after the local and the Caucasian ones. All other cuisines comes after at least 10 percentage points.



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FOOD E-COMMERCE IS RUNNING FAST

A 58 BILLION EURO BUSINESS, MADE OF 1.5 BILLION CONSUMERS ON A GLOBAL SCALE. AN IN-DEPTH ANALYSIS OF THE SECTOR PROVIDED BY NETCOMM, THE ITALIAN CONSORTIUM FOR DIGITAL COMMERCE.



The growth of food e-commerce, a business worth 58 billion euro worldwide - 14.9 billion in Europe and 1.6 billion in Italy – shows no sign of slowing down. Over 1.5 billion people purchase food online, two thirds of online shoppers globally (that exceed 2 billion). In Europe, more than 167 million people buy food online: 9 million in Italy, 10 million in Spain, 13.5 million in France, 18 million in Germany and 19 million in the United Kingdom. These are some of the data displayed on the past November in Milan, on the occasion of the third edition of 'Netcomm Focus Food', event dedicated to digital evolution in the food & grocery sector, promoted by the Netcomm consortium in collaboration with Tuttofood, organizers of the renowned Milan-based trade show.

The importance to provide a better shopping experience

"We have been witnessing a change in how consumers buy food products, which does not only take place online, but with innovative delivery methods, such as click & collect in store or drive-in, and with ever simpler solutions, such as subscription or the creation of pre-set shopping lists. Again, customization is the key to developing these services", said Roberto Liscia, president of Netcomm. "Experience has become fundamental to digital food retailers, simplifying the so-called 'food journey', which today is quite complex: from selection to order, from payment to delivery. Different methods of selecting products rather than in-store, long orders often made through mobile devices and fast changing delivery/payment services are some of the elements that companies need to simplify, in order to innovate - and improve - the shopping experience".

Focus on Italy

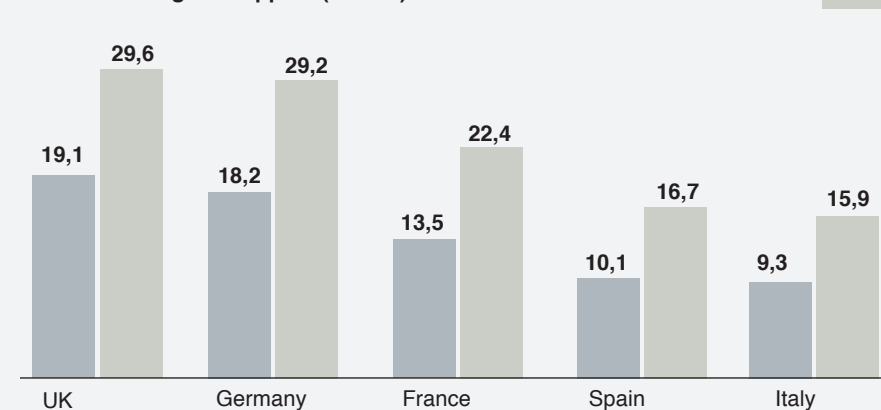
In 2019, food was the fastest growing sector online. The market is worth 1.6 billion euro in Italy, up 42% over last year (compared to the +15% experienced by e-commerce as a whole). Despite this dynamism, online food & grocery still accounts for a small part (5%) of total online purchases, worth 31.6 billion euro. The development of food delivery is also connected with a stronger presence of digital operators in medium-large cities. In recent years, most of the players have invested to activate their services in new cities and to increase the offer available. Today, 93% of Italian cities with a population of over 50,000 inhabitants can take advantage of home deliveries (it was 74% in 2017) and about one in two inhabitants (47%) can order ready meals online (in 2017, only a third of the Italian population could ask for a food delivery service).

Il food online viaggia a mille

Non si arresta la crescita del business dell'e-commerce alimentare, che nel mondo vale 58 miliardi di euro (14,9 miliardi in Europa e 1,6 miliardi in Italia). Sono oltre 1,5 miliardi le persone che acquistano alimentari online, vale a dire due terzi degli acquirenti online a livello globale (oltre 2 miliardi). In Europa sono più di 167 milioni le persone che acquistano food online. Un dato che tuttavia, per l'Italia, si ferma a 9 milioni (il più basso in Europa). I dati della terza edizione di Netcomm Focus Food.

THE UK IS THE N.1 COUNTRY, IN EUROPE, FOR NUMBER OF FOOD ONLINE SHOPPERS

Food & Beverages shoppers (million)



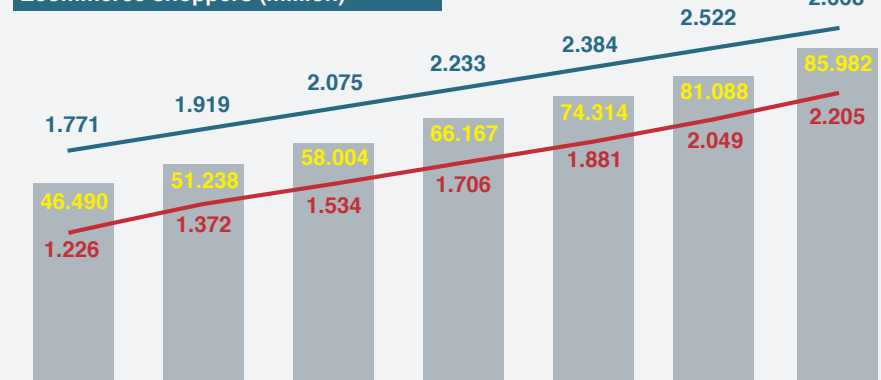
Source: Netcomm

THE GLOBAL BUSINESS OF F&B E-COMMERCE IS BOOMING

Food & Beverage shoppers (million)

Million euros

Ecommerce shoppers (million)



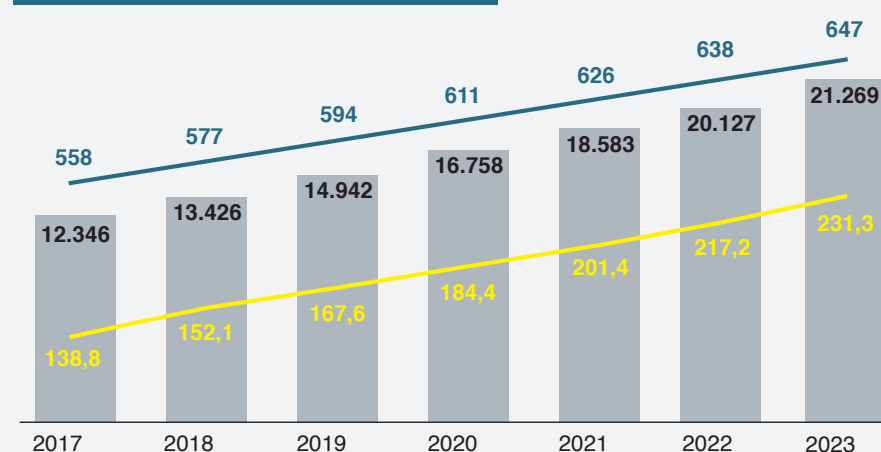
Source: Statista 2019

THE EUROPEAN BUSINESS OF F&B E-COMMERCE IS GROWING AT A FAST PACE

Food & Beverage shoppers (million)

Million euros

Ecommerce shoppers in Europe (million)



Source: Statista 2019



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