

edizioni **turbo.**

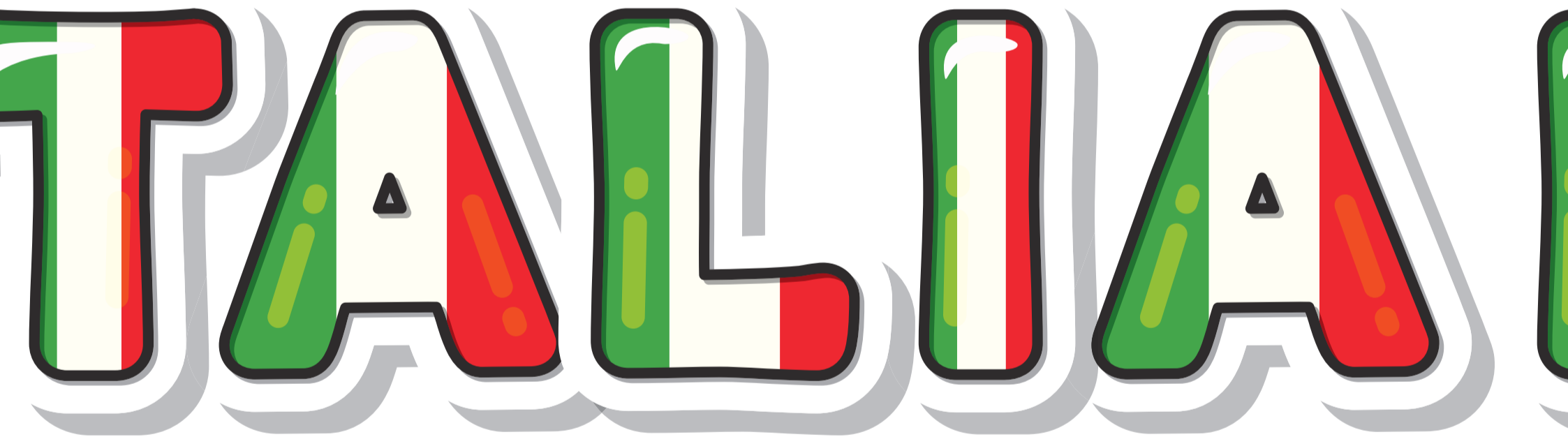
In partnership with

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



THE ITALIAN FOOD MAGAZINE BUYER'S • GUIDE

YEAR 8 - N° 4 • JUNE 2020
MANAGING DIRECTOR: ANGELO FRIGERIO





EDITORIAL

by Angelo Frigerio

BEYOND CORONAVIRUS, FOUR STRUCTURAL CHANGES

Nothing will be like before: how many times did we hear that lately? The Coronavirus emergency, besides causing concrete changes in lifestyle, will significantly influence the business world. Problems will arise. But opportunities will too. According to Nathan Sheets, Chief Economist of PGIM Fixed Income, delegate for the management of Pramerica SGR: "There will be four structural changes. Which will probably shape new business models far beyond the mitigation of Coronavirus crisis". The first issue is represented by the international supply chains bifurcation. Their collapse, in China above all, has been registered as one of the most significant effect of the lockdown caused by Coronavirus. "Supply chains will divide into two different segments after the crisis: one group of companies will rely even more significantly to the global ones, increasing their resilience and branching out geographically into several headquarters. Another group will step back about international externalization and resort to automation in order to bring companies back on the global market", explains Nathan Sheets. Stocks represent another problem pointed up by pandemic. In order to cut down on expenses, companies chose to produce 'just in

time', reducing excess inventory, with the aim of simplifying the production. The ongoing pandemic exposed the lack of resilience and flexibility of the current inventory management in many companies, especially in the upstream stages of the supply chains, where there are further less opportunities of substitution.

Another issue concerns the model of company foreshadowing for the future. The immaterial activities represent now 70% of S&P Europe 350 value and 85% of S&P 500 USA value. The acceleration of the century-old transition to more agile companies, or better weightless, will be one of the most important commercial consequences of the big lockdown. Technological giants such as Tencent, Microsoft, Alibaba and Amazon, who offer an enticing range of business and consumer services, benefited enormously from the significant rise of the online activity, catching the bulges of demand in the world.

Workplace will change too. Offices will not disappear but the demand for shared spaces will diminish, as a result of social distancing, and smart working instead will increase.

These are all issues to deal with. And that need to be solved. As soon as possible.

OLTRE IL CORONAVIRUS, QUATTRO CAMBIAMENTI STRUTTURALI

Nulla sarà come prima: quante volte ce lo siamo sentiti dire negli ultimi tempi? L'emergenza Coronavirus, oltre a provocare concreti cambiamenti nel modo di vivere, impatterà in maniera sensibile sul mondo delle aziende. Nasceranno problemi. Ma anche opportunità. Secondo Nathan Sheets, Chief Economist di PGIM Fixed Income, gestore delegato di Pramerica SGR: "Ci saranno quattro cambiamenti strutturali. Che probabilmente riplasmeranno i modelli di business aziendali ben oltre l'attenuarsi della crisi legata al coronavirus".

La prima questione riguarda la biforcazione delle supply chain internazionali. Tra gli impatti più significa-

tivi del lockdown per il Coronavirus, si è registrato infatti il collasso delle catene di distribuzione internazionali, iniziando dalla Cina. Continua Nathan Sheets: "Le catene di fornitura post-crisi si divideranno in due segmenti divergenti: un gruppo di aziende si affiderà in maniera ancora più significativa a quelle globali, aumentandone la resilienza e diversificando geograficamente su più sedi. Un altro gruppo farà un passo indietro rispetto all'esternalizzazione internazionale e farà ricorso all'automazione per riportare le attività sui mercati nazionali".

Un altro problema evidenziato dalla pandemia è stato quello delle scorte. Le aziende per ridurre i costi

hanno preferito usare la produzione 'just in time', che implica una riduzione delle scorte in eccesso, al fine di snellire la produzione. La pandemia in corso ha messo a nudo la mancanza di resilienza e flessibilità nell'attuale gestione dell'inventario di molte aziende, in particolare nei settori a monte della catena produttiva, dove le opportunità di sostituzione sono molto più limitate.

Un'altra questione riguarda il modello di azienda che si prefigura all'orizzonte. Le attività immateriali rappresentano ora il 70% del valore dell'S&P Europe 350 e l'85% del valore dell'S&P 500 USA. Un'accelerazione della transizione secolare verso aziende sempre più agili, ossia weightless, sarà

una delle più importanti conseguenze commerciali del grande lockdown. Conglomerati tecnologici come Tencent, Microsoft, Alibaba e Amazon, con una gamma tentacolare di servizi per le imprese e per i consumatori finali, hanno beneficiato enormemente del significativo aumento dell'attività online, catturando le impennate della domanda nel mondo.

Cambierà anche lo spazio del lavoro. Gli uffici non scompariranno ma diminuirà la domanda di spazi condivisi, a seguito dell'esigenza di mantenere il distanziamento sociale, e aumenterà il lavoro a distanza.

Tutte questioni da affrontare. E risolvere. Al più presto.

It's how we want it.



An aperitivo is like a homage. To saints, to poets, to gourmets, to the inventor of the first Italian aperitivo. For some it's a ritual, for all a pleasure, a chance to sit down together and toast to past exploits, or to a new love. It's ready with one gesture, true and down to earth, with the great deli meats of our hills, cheese, breadsticks and olives: 100% authentic Italian.

Our cured meats tell the story of who we are. We are Terre Ducali.



TERREDUCALI.IT





INSIDE

6 CONFECTIONERY
BHB ITALIA: SPONGE CAKE MASTERS

7 THE INTERVIEW
PAST, PRESENT AND FUTURE OF A NEW WORLD

8-9 ZOOM
'FARM TO FORK': THE EU STRATEGY GOES UNDER DEBATE

10 BAKERY
TERRE DI PUGLIA: TARALLI ADDICTED

11-25 THE SURVEY
ITALIAN PROUD



26-27 FOCUS ON
THE DANGERS OF LIVING IN A MEAT-FREE WORLD

28-30 EXPORT
BRAZIL: CONTINENTAL-SIZE MARKET

31 EXHIBITIONS
LET'S RESTART (SAFELY)

THE ITALIAN FOOD
BUYER'S GUIDE

THE ITALIAN FOOD MAGAZINE

Managing director: ANGELO FRIGERIO
Edited by: Edizioni Turbo Srl - Palazzo di Vetro
Corso della Resistenza, 23 - 20821 - Meda (MB)
Tel. +39 0362 600463/4/5/9

Fax. +39 0362 600616 - e-mail: info@tespi.net

Anno 8 - numero 4 - giugno 2020

Periodico bimestrale - Registrazione al Tribunale di Milano n. 38 del 25 febbraio 2015

Edizioni Turbo Srl n° iscrizione ROCI 1158 del 21 aprile 2005

Stampa: Ingraph - Seregno (MB)

Poste Italiane Spa - Sped. in Abbonamento Postale DL 353/2003

(conv. in L. 27.02.2004, n.46) art. 1, comma 1, LO/MI

Prezzo di una copia 1,55 euro - arretrati 7,55 euro + spese postali

Abbonamento annuale per l'Italia 20,00 euro via ordinaria.

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

Responsabile dati: Angelo Frigerio

Copyright Tutti i diritti sono riservati. Nessuna parte della rivista può essere riprodotta in qualsiasi forma o rielaborata con l'uso di sistemi elettronici, o riprodotta, o diffusa, senza l'autorizzazione scritta dell'editore. Manoscritti e foto, anche se non pubblicati, non vengono restituiti. La redazione si è curata di ottenere il copyright delle immagini pubblicate, nel caso in cui ciò non sia stato possibile, l'editore è a disposizione degli aventi diritto per regolare eventuali spettanze.

Pubblicazioni Edizioni Turbo by Tespi Mediagroup

Salumi & Consumi, Salumi & Tecnologie, Formaggi & Consumi, Formaggi & Tecnologie, DS Dolci/Salati & Consumi, Vini & Consumi, Bio & Consumi, Bio & Consumi Green Lifestyle, The Italian Food Magazine, Tech4Food, Luxury Food&Beverage, b2B beautyToBusiness, MC Media Contents, Odeon Magazine, Gamestore Magazine, HiTech Magazine, TGTuttogiocattoli, www.alimentando.info, www.hitechweb.info, www.technospia.it

Questo numero è stato chiuso
in redazione il 22 giugno 2020

NEWS

PEGGY DAVIES IS THE NEW PRESIDENT OF PLMA

The Board of directors of the Private Label Manufacturers Association (Plma) chose Peggy Davies (picture) as the new president of the association. The election comes a month after the death of Brian Sharoff, former president and symbol of the Plma for 40 years. "I am honored and grateful for this incredible responsibility I was given to", comments Peggy Davies, who has been covering the role of vice president of association relations in Plma since 2016. "As we cope with the loss of Brian, we will do our best to honor his decennial inheritance by carrying on his vision, that we built together in the last four years".



Peggy Davies è il nuovo presidente di Plma

Il Consiglio di amministrazione della Private Label Manufacturers Association (Plma) ha nominato Peggy Davies (foto) come nuovo presidente dell'associazione. Una nomina che giunge a un mese di distanza dalla morte di Brian Sharoff, storico presidente e volto della Plma per oltre 40 anni. "Sono onorata e grata di questa incredibile responsabilità che mi è stata affidata", è il commento di Peggy Davies, che dal 2016 riveste la carica di vice president of association relations per Plma. "Mentre affrontiamo la perdita di Brian, onoreremo al meglio la sua eredità decennale portando avanti la sua visione, che abbiamo costruito insieme negli ultimi quattro anni".

DIGITAL TAX: UNITED STATES THREATEN DUTIES AT A 100% RATE ON MADE IN ITALY PRODUCTS

The United States threaten new duties against Italy. Indeed, the White House considers the possibility of introducing duties at a 100% rate on Italian wine, pasta and olive oil as a countermove to the digital tax drawn up by Italy (but also Austria, India, Indonesia and Turkey). Robert Lighthizer, United States Trade Representative (Ustr), announced the opening of a new investigation on the digital taxes implemented or in process of being adopted by commercial partners of the US. The inquiry also investigates on if the digital taxes adopted by the different countries follow the international fiscal regulations or "aim at damaging tech companies particularly for their commercial success". During the financial G7, which was held on conference call on 3rd June, Paolo Gentiloni, commissioner for the Economic and monetary affairs, declared himself to be surprised by the American measures and pointed out that the EU has not already introduced a tax on digital activities, as it is waiting for an Oecd agreement.

Digital tax: gli Usa minacciano dazi al 100% sui prodotti made in Italy

Torna la minaccia dei dazi contro l'Italia da parte degli Usa. La Casa Bianca sta infatti rivalutando dazi al 100% su vino, pasta e olio di oliva made in Italy per controbattere la digital tax decisa dall'Italia (ma anche da Austria, India, Indonesia e Turchia). Robert Lighthizer, il rappresentante del commercio americano (Ustr), ha infatti annunciato l'apertura di una nuova indagine sulle tasse ai servizi digitali adottate o in via di decisione da parte di partner commerciali degli Stati Uniti. L'inchiesta cercherà quindi di capire se le digital tax adottate dai vari Paesi sono in linea con le normative fiscali internazionali o "se hanno lo scopo di penalizzare in particolare le società tecnologiche per i loro successi commerciali". Paolo Gentiloni, commissario agli Affari monetari, intervenuto in occasione del G7 finanziario che si è svolto in video conferenza ieri pomeriggio, si è dichiarato sorpreso delle misure americane e ha sottolineato che l'Ue non ha ancora introdotto alcuna tassa sulle attività digitali, in attesa di un accordo Ocse.

NEW DATES FOR B/OPEN: IT WILL TAKE PLACE ON 23RD AND 24TH NOVEMBER

New dates for B/Open, the B2B exhibition by Veronafiore focused on organic food and natural self-care. The first edition of the event will take place on 23rd and 24th November 2020, in contemporary with wine2wine, the event dedicated to wine's market. B/Open was firstly planned from 1st to 3rd April, then postponed to June and now it has been rescheduled again in a two-days smart version, in order to guarantee the best safety conditions possible to operators and exhibitors. The months preceding B/Open will be used to offer training events with experts of the sector about different topics, such as the analysis of the organic brand during Covid-19 pandemic, blockchain and traceability, financial instruments, local bonds and micro-credit for the sector, export and certification schemes in the main EU and extra-EU countries.

Nuove date per B/Open: si terrà il 23 e 24 novembre

Nuove date per B/Open, la manifestazione B2B di Veronafiore dedicata al food biologico e al natural self-care. La prima edizione del salone si terrà il 23 e 24 novembre 2020, contemporaneamente a wine2wine, appuntamento dedicato al mondo del vino. Inizialmente prevista nei giorni 1-3 aprile, quindi posticipata a giugno, B/Open è stata nuovamente riprogrammata in una formula smart di due giorni per garantire a operatori ed espositori le massime condizioni di sicurezza. Nei mesi che precederanno l'evento, saranno organizzati appuntamenti di formazione online curati da professionisti del settore su temi quali l'analisi del trend del biologico durante il Covid-19, blockchain e tracciabilità, strumenti finanziari, bond locali e microcredito a supporto del settore, export e schemi di certificazione nei principali Paesi Ue ed extra Ue.

PANDEMIC BOOST DIGITAL PAYMENTS IN MASS MARKET RETAILERS

Up to now, in Europe, Italy was bringing up the rear about e-payments, which represent no more than 29% of transactions. But the situation has been rapidly evolving, especially since the Who has declared that banknotes work as a vehicle for the transmission of viruses and bacteria. Moreover, the Journal of Hospital Infection claims that the virus can resist on banknotes up to nine days at room temperature. As a consequence, Satispay registered an increase in the volume of its transactions from 23 million euros in February to 40 million in May. Michele Centemero, country manager of Mastercard Italy, explained that 20% of the payments in the mass market retailers, were made electronically instead of in cash. 70% of the credit card transactions were also contactless, with the average value for transaction that is constantly decreasing and today amounts to 38 euros.

La pandemia accelera l'uso dei pagamenti digitali in Gdo

Sino ad ora l'Italia è stata fanalino di coda in Europa per l'uso del denaro elettronico, che rappresenta non più del 29% dei pagamenti. Ma la situazione sta rapidamente evolvendo, soprattutto da quando l'Oms ha dichiarato che le banconote sono un veicolo di diffusione di virus e batteri. A rincarare la dose, il Journal of Hospital Infection, il quale sostiene che il virus possa resistere sulle banconote fino a nove giorni a temperatura ambiente. Ecco allora che una realtà come Satispay ha visto salire il volume delle transazioni gestite dai 23 milioni di euro a febbraio ai 40 milioni di maggio. Anche Michele Centemero, country manager di Mastercard Italia, ha dichiarato che, per quanto riguarda i pagamenti in Gdo, nelle ultime settimane si è verificato uno spostamento del 20% dei pagamenti dai contanti al denaro digitale. Il 70% delle transazioni con carta di credito sono contactless, con un valore medio per transazione che continua a scendere, e che oggi ammonta a 38 euro.

WINEMONITOR: CORONAVIRUS AND BREXIT AFFECT THE CONSUMPTION OF ITALIAN WINE IN THE UK

During the lockdown, 3 out of 10 British consumers stated that they drank less Italian wine than before the quarantine, against 53% of people who did not change their purchasing preferences. This was pointed out by a research carried out by Wine Monitor, the Nomisma Observatory on the wine market, on 1,000 wine consumers in the United Kingdom. According to the study, among the main reasons behind the consumption's decrease there is the closing of restaurants and pub or wine bars. The out of home represents indeed 45% of the global food consumption in the UK (35% in Italy). Other reasons can be found in the increase of the daily consumption, and no more in the occasional one; in the frequency reduction of shopping in stores and mass retail; and in the cuts in the family budget. The threat of a 'no deal' Brexit affected our wine export's prospects too. Since 1st February UK is indeed a 'third country' as against the EU, in a transitory regime which is expected to last until 31st December 2020. With a value of more than 3.4 billion euros, the UK represents the fourth destination market for the Italian food products, and 770 million euros are connected with wine.

Winemonitor: Coronavirus e Brexit influenzano il consumo di vino italiano nel Regno Unito

Nei mesi del lockdown, 3 consumatori inglesi su 10 dichiarano di aver consumato meno vino italiano rispetto al periodo pre-quarantena, contro un 53% che non ha modificato le proprie preferenze di acquisto. È quanto emerge da un'indagine condotta da Wine Monitor, l'Osservatorio di Nomisma dedicato al mercato vinicolo, su 1.000 consumatori di vino in Gran Bretagna. Tra le principali ragioni della riduzione nei consumi c'è, secondo la ricerca, la chiusura di ristoranti e pub/wine bar. Il fuori casa incide infatti per il 45% del valore totale dei consumi alimentari in Gran Bretagna (in Italia è il 35%). Le altre motivazioni sono l'incremento dei consumi quotidiani e non più occasionali; la riduzione della frequenza di acquisto nei negozi e in Gdo; e i vincoli di bilancio familiare sempre più stringenti. A incidere sulle prospettive per il nostro export vinicolo anche lo spettro del 'no deal'. Dal 1° febbraio scorso in Paese è infatti uno 'Stato terzo' rispetto all'Ue, con la previsione di un regime transitorio fino al 31 dicembre 2020. Con un valore superiore ai 3,4 miliardi di euro, il Regno Unito rappresenta il quarto mercato di export di prodotti agroalimentari italiani, di cui 770 milioni di euro legati al vino.

FERRERO REINFORCES ITS PRESENCE IN THE US WITH A NEW DISTRIBUTION CENTER IN GEORGIA

Ferrero Usa, American subsidiary of the confectionery multinational company from Alba (Cuneo), and third largest company of the sector after Mars and Hershey, will have a new operative distribution center by the end of September. The newly built plant – which covers a surface of 67 thousand squared meters – is settled in McDonough, Georgia, and will probably give work to 250 people. It will give the company a better capacity to distribute its brands range in all North America, beginning from the recently acquired Butterfinger, Baby Ruth and Crunch (bought from Nestlé), but also Rocher, Nutella, Tic Tac and Kinder. The project has been developed after the investments made from the group during the last years on the American territory. Such as the enlargement of the headquarters in New Jersey and the opening of new distribution centers in Pennsylvania and Arizona. But also, the two production sites in Bloomington and Franklin Park (Illinois), which Ferrero was put in charge of through the acquisition of the confectionery US division of Nestlé, last part of a purchasing program which allowed Ferrero to acquire other memorable companies, such as Fannie May and Ferrara Candy Company.

Ferrero rafforza la presenza negli Usa con un nuovo centro di distribuzione in Georgia

Sarà operativo entro la fine di settembre un nuovo centro di distribuzione di Ferrero Usa, la controllata nordamericana della multinazionale dolciaria albese, terzo big del dolciario Usa, dopo Mars ed Hershey. L'impianto di nuova costruzione – che copre una superficie di 67mila metri quadrati e che dovrebbe impiegare all'incirca 250 addetti – è situato a McDonough, in Georgia. Servirà a migliorare la capacità dell'azienda di distribuire in tutto il Nord America il proprio portafoglio di marchi, a partire dai nuovi ingressi Butterfinger, Baby Ruth e Crunch (acquisiti da Nestlé) per poi focalizzarsi su Rocher, Nutella, Tic Tac e Kinder. Il progetto è stato messo a punto in seguito agli investimenti che il gruppo ha portato a compimento sul territorio americano negli ultimi anni. Tra questi, l'ampliamento della sede in New Jersey, l'apertura di nuovi centri di distribuzione in Pennsylvania e Arizona, la presa in carico dei due stabilimenti produttivi di Bloomington e Franklin Park, in Illinois, rilevati con l'acquisizione del business dolciario Usa di Nestlé, ultimo tassello di una campagna acquisti che, sempre in Nord America, ha visto Ferrero rilevare altre storiche realtà quali Fannie May e Ferrara Candy Company.

PROSCIUTTO DI PARMA: HOW THE CONSORZIO PLANS TO OVERCOME THE CRISIS

The manufacturers of Prosciutto di Parma have drawn up a plan to support the production system of the Pdo product and overcome the current difficulties, also trying to limit damage. As all the other sectors, the Parma ham manufacture was strongly affected by pandemic too, so much that it even



lost at least 30% of its global turnover. "The complete lockdown of the Horeca channel and the strong drop in the sales generated at the deli counter caused a reduction in the trade of Italy of about 35% and a decrease of 30% in our exportation", explained Vittorio Capanna, president of the Consorzio. "In reaction to these huge difficulties, we reduced the production by 16% in the first five months of the year". The Consorzio asked the Italian Ministry of Agriculture to modify the regulation in order to extend the shelf life of pre-cut Prosciutto by 30 days, so that it can be shipped by boat instead of airplane.

Prosciutto di Parma: il piano del Consorzio per uscire dalla crisi

Il comparto del prosciutto di Parma mette in campo un piano per sostenere il sistema produttivo della Dop e superare le criticità del momento, limitando il più possibile i danni. Come tutti i settori, anche quello del Parma è stato infatti duramente colpito dalla pandemia, tanto da registrare una perdita complessiva di almeno il 30% del proprio fatturato. "La totale chiusura del canale Horeca e la drastica diminuzione delle vendite al banco taglio hanno determinato un calo commerciale in Italia di circa 35% e una riduzione del 30% delle nostre esportazioni", ha dichiarato Vittorio Capanna, presidente del Consorzio. "A fronte di queste enormi difficoltà, abbiamo reagito con una riduzione della produzione del 16% nei primi cinque mesi dell'anno". Il Consorzio ha chiesto al Mipaaf una modifica al disciplinare per estendere di 30 giorni la shelf life del prosciutto preaffettato, consentendo così ai produttori di utilizzare il trasporto marittimo anziché quello aereo.

SPONGE CAKE MASTERS

BHB ITALIA OFFERS A WIDE AND ENVIRONMENTALLY-FRIENDLY PRODUCT RANGE, ABLE TO MEET THE NEEDS OF MODERN CONSUMERS WORLDWIDE. NOW ALSO ORGANIC AND GLUTEN-FREE.



Specialized producer of sponge cake, roll cake and muffins since its foundation, after World War II, BHB Italia is a modern and dynamic company, focused on key values like quality and the protection of its territory. "In recent time we have widened and updated our production plant, thus staying true to our founding mission: the safeguard of the environment, which has turned in a project named 'BHB Green'," the company explained. Headquartered in the province of Treviso, in the North-East of Italy, BHB Italia can rely on a consolidated presence on the domestic market, while over the last years it has significantly increase its export sales, especially across Europe. "In 2019, sales amounted to about 6.5 million euro, with exports accounting for around 25% of this value", it added. "We are present both with our brands and with private labels in markets like Spain, Austria, Rumania, Great Britain, Greece, Slovenia, Hungary, Malta, the Netherlands, Finland, Denmark and Germany."

BHB Italia is able to meet the needs and requests of all distribution channels: from the confectionery industry to artisan producers, from the catering and food service industry to bakeries, including retailers and the large-scale distribution. "Today, we are investing in marketing and communication with constant advertising and informative campaigns. Participation in the international trade fairs has also shown to be a key factor for our business strategy," the company highlights. In 2020, before the Covid-19 Pandemic changed the plans, BHB Italia exhibited at Marca (Bologna), Sigep (Rimini), ISM (Cologne, Germany), and Sirha (Budapest, Hungary).

A TAILOR-MADE RANGE FOR LARGE-SCALE RETAIL



BHB Italia has created some new sponge cake recipes specifically for the large-scale retail trade. Besides the classic neutral and cocoa versions, there are two innovations available: the organic and the gluten-free sponge cakes. Products designed for the final consumer, ready to use and extremely versatile. All the products in this line of sponge cake come with flowpack packaging, wrapped in a cardboard strip with eye-catching and colourful graphics. In line with the company's 'green' policy, there are indications on the wrapping regarding correct waste disposal for differentiated collection. Furthermore, the wrapping of the product contains 60% less plastic material compared to normal semi-rigid packaging used for sponge cake. All sponge cakes produced by BHB Italia contain no palm oil or hydrogenated fats and are made with eggs from free-range chickens.

BHB product line

- Sponge cake 28x38 cm Party edition, pack of 3 layers, neutral and cocoa flavours
- Roll cake 28x38 cm pack of 6 layers, neutral and cocoa flavours

Petite Génoise product line

- Sponge cake diameter 24 cm, pack of 3 layers, neutral and cocoa flavours
- Sponge cake 18x28 cm, pack of 3 layers, neutral and cocoa flavours

Casa Grande product line

- Sponge cake 14x28 cm re-sealable pack, available in neutral and cocoa flavours
- Sponge cake diameter 24 cm, 3-layer pack, thickness 1.3 cm, neutral and cocoa flavours

- **ORGANIC** Sponge cake diameter 24 cm, 3-layer pack, thickness 1.3 cm, neutral flavour

- **GLUTEN-FREE** Sponge cake diameter 24 cm, pack of 1 round, thickness 4 cm, neutral flavour



BHB Italia: gli specialisti del pan di spagna

Un'azienda moderna e dinamica, specializzata nella produzione di pan di spagna, roulé e muffin destinati a svariati canali di distribuzione: dall'industria dolciaria ai produttori artigianali, dalla ristorazione alle pasticcerie, fino alla Grande distribuzione organizzata. E proprio per questo canale, BHB Italia ha creato alcune nuove ricette del pan di spagna, oggi disponibile anche nella versione biologica e gluten free. E presto anche vegan.





PAST, PRESENT AND FUTURE OF A NEW WORLD

280 ENTREPRENEURS FROM DIFFERENT COUNTRIES. AN OVERALL SURVEY TO UNDERSTAND HOW THEY FACED THE BEFORE AND AFTER COVID-19. INTERVIEW WITH PIERGIORGIO FOLCIO, BUSINESS DEVELOPMENT MANAGER IN THE FIELDS OF ENTERTAINMENT, FURNITURE INDUSTRY AND RESTAURANTS.

The Coronavirus emergency affected, more or less heavily, almost every sector of the economy. Which had to face a brand-new reality. In order to understand the market's sentiment of different countries, Piergiorgio Folcio, business development manager in the fields of entertainment, furniture industry and restaurants, carried out a survey among 280 entrepreneurs from all over the world.

What does the survey consist in?

We interviewed 280 entrepreneurs to point out and compare the sentiment of different sectors and countries. The panel was composed of commercial directors, small and big entrepreneurs, business owners, ceo and cfo. And the aim was to gather and compare their opinions, according to nation, culture and economic field. For example, for South Korea we focused on automotive, online gaming and home entertainment. For Spain, France and Italy we analyzed the wine and food industry, plus fashion and interior design for our country. For the United States, instead we examined finance and healthcare.

Did you find key points?

We were particularly surprised by the approach to the emergency, that was different according to the 'blocks' of countries. For example, we noticed that in Asia the virus was seen as an obstacle that had to be overtaken 'collectively', by maintaining a high sense of responsibility. China has instead faced the emergency in a very pragmatic way.

What about Europe?

Europe kind of 'split' into two groups. The entrepreneurs from the South Europe came out as the most disappointed from the situation. The ones from Spain, France and Italy seems the most affected by the crisis, and the interviewees pointed out a lack of responses and solutions from the government and the healthcare system. The North of Europe instead maintained a more 'realistic' and less pessimistic vision, with a smaller psychological impact for the citizens. For an example, despite the reopening of restaurants in Italy, many people will



Piergiorgio Folcio

be probably worried about going out for dinner. The 'psychological recovery' and the restart of daily activities will be an issue for some areas more than others.

Let's talk about Italy...

Many of the Italian interviewees work for the furniture industry. The ones who own a well-established commercial structure seem generally confident about the future and see the problem as a 'hiccup'. However, because of the increase in smart working and the restrictions to tourism, we need to take into account that who works with offices and hotels will be hit more than the ones who work with domestic furniture.

Coronavirus has changed many aspects of the daily life, such as education, work and shopping

dynamics, and lot of people resorted to the online stores...

It is pretty clear that Covid has changed the daily life. However, we still need to discover if it is forever or just temporarily. Also in terms of tourism, for example, we do not know when we will be able again to travel 'normally' and at what costs, considering the restrictions adopted against pandemic. As for the home delivery, Italy has never relied much on it. And this was highlighted when the people had to wait at least 14 days for the products bought from the supermarket's website.

There was also a general revaluation of the house...

Just to make an example, Milan is generally chosen for the out-of-home activities, that are now impossible considering the restrictions, so a small house is no more counterbalanced by these 'plus features'. Moreover, many people chose Milan for the proximity to their workplace and now they do not need it anymore, because of the increase of smart working. That will also affect the investments made for the physical workspaces and digitalization.

Which sectors were the least affected by the emergency?

Food industry, as well as the pharmaceutical one, seem to have suffered less than other sectors for the pandemic, as they offer essential goods. And, naturally, home entertainment, streaming and e-commerce grew as well, led by Amazon, Netflix and Alibaba. The companies especially suffered on the export side because of the logistic restrictions. This is why the businesses who already sold products online have partly checked the crisis.

How much did the quantity of government support influence the interviewees' opinion?

It was fundamental. In the US many entrepreneurs received financial support just few days after the beginning of lockdown. And the same happened in Switzerland. However, we must consider that these are countries with a high expenditure capacity that could deliver the necessary financial aid in a short time.

Passato, presente e futuro di un nuovo mondo

L'emergenza Coronavirus ha influenzato, in maniera più o meno marcata, tutti i settori dell'economia. Che si sono trovati a dover far fronte a una realtà completamente inedita. Per poter comprendere il sentiment delle attività di diversi Paesi, Piergiorgio Folcio, business development manager nel campo di entertainment, mobili e ristorazione, ha realizzato, con alcuni collaboratori, un'indagine con 280 imprenditori di tutto il mondo. Con un panel composto da direttori commerciali, piccoli e grandi imprenditori, proprietari di attività, amministratori delegati, chief financial officer.



'FARM TO FORK': THE EU STRATEGY GOES UNDER DEBATE

THE NEW GUIDELINES FOR AGRICULTURE AND FOOD INDUSTRY FOR THE NEXT DECADE AROUSED DUBTS. LESS FERTILIZERS AND ANTIBIOTICS. MORE ORGANIC FIELDS. MANDATORY ORIGIN OF THE INGREDIENTS AND REFORMULATION OF SOME PRODUCTS. THE COMMENTS OF SOME KEY PLAYERS AND ASSOCIATIONS.

The challenge of the 'Farm to Fork' strategy is the core of the new European Green Deal. Announced by the EU Commission on 20th May, it outlines the role of the agriculture and food industry and focuses on a more sustainable food production and consumption. In order to reconcile what we eat with the needs of our planet and to reduce the ecological footprint of the European citizens, by ensuring safe and sustainable food but also a fair compensation to every link of the chain. And everything has to be made with an open eye on climate change and on the nutritional elements of the products. Which is a particularly debated point, given the explicit support to meat substitutes and 'alternative' proteins from now to 2023. The strategy on sustainability 'producer to consumer' (literally 'farm to fork') made by the European Commission can count on an endowment of about 20 billion euros, adding up the funds from EU, member States and private subjects. It is not made of binding targets, but instead guidelines for future legislative acts that must be arranged with the European Council and Parliament. In these cases, it is not easy to please everybody. And the debate has indeed polarized, producing opposite reactions.

The reactions of the agriculture

"The Commission's proposals", comments Massimiliano Giansanti, president of Confagricoltura, "penalize the production potential of the European agriculture and food system. It is

a prospect we do not agree on, also because this would cause an increase in the importation from third countries, that apply different and less strict rules". The president of Alleanza delle cooperative agroalimentari, Giorgio Mercuri, points out the risk for the EU strategy to compromise security: "Before every European legislative action it will be necessary to consider carefully the effects of such an important plan on farmers and cooperatives. They need alternatives in order to be able to reach such ambitious targets without compromising their subsistence. A 'blindfold' approach can endanger the European food security, the competitiveness and the salaries of thousand companies and cooperatives which were already heavily hit but the Covid-19 emergency".

The reserves of Paolo De Castro (S&D)

The member of the EU parliament Paolo De Castro gives his warning too: "We are ready to take on the ambitious challenge of the Commission, but not at all costs. This is the beginning of a path that must bring to a fiduciary agreement between European producers and consumers, based on quality, transparency and security of the production process and the food we eat". He also added: "We are very concerned that the reduction targets for the use of production inputs could jeopardize the production capability of our farmers: every restriction must be accompanied by the disposal of alternative instruments".

Federalimentare: "Competitiveness endangered"

Ivano Vacondio, president of Federalimentare, steps into the debate too: "Given the sanitary, social and economic emergency caused by the spread of Covid-19, we believe that the Farm to Fork Strategy should be steered with an open eye on the prior necessity to help the companies of the agriculture and food chain, in particular the smallest ones, to boost them after the crisis caused by pandemic. On the contrary, we notice that there are still commitments that charge companies with additional burdens, such as the ones for packaging, most of which are not affordable in the current situation. The European institutions, in our opinion, should pay more attention to the risk that such measures could bring a consistent loss of international competitiveness of the agriculture and food sector across the entire European Union".

Satisfaction from the organic sector

Thumbs up from the organic sector associations. In particular, for the key role given to the organic agriculture as a method capable of bringing benefits to the environment and health, and of creating occupations for young farmers. "The Farm to Fork and biodiversity strategies represent the beginning of a path towards Green Deal and a real twist for the European agriculture to put the organic farming at the core of a transition to more sustainable cultivation systems", stated Maria Grazia Mammuccini, president of Federbio.

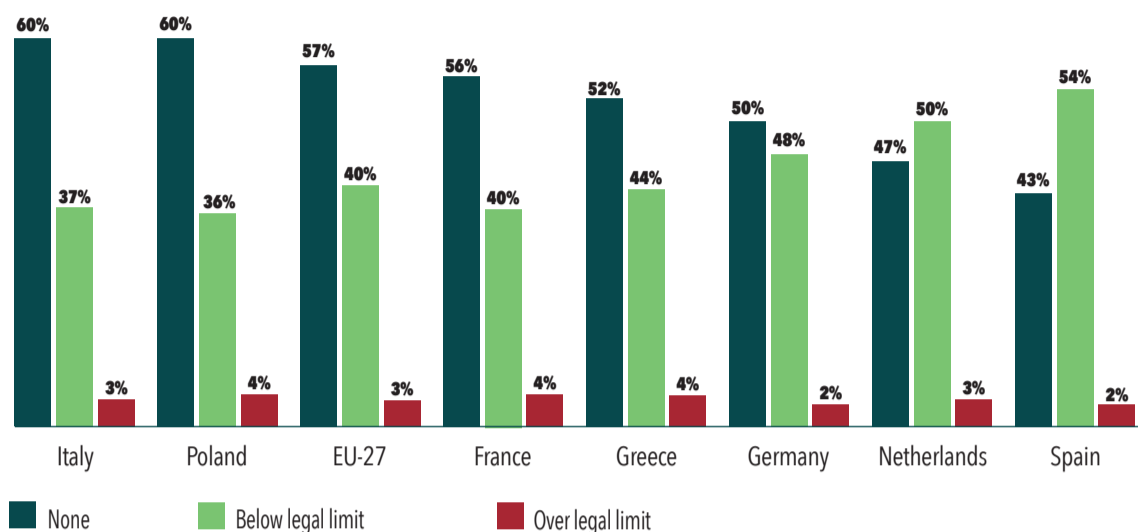
'Farm to form': la strategia UE fa discutere

La sfida della strategia 'Farm to Fork' è al cuore del nuovo European Green Deal. Annunciata dalla Commissione Ue il 20 maggio, delinea il ruolo dell'agroalimentare ed è incentrata sulla produzione e sul consumo di cibo in maniera più sostenibile. Per conciliare quello che mangiamo con le esigenze del pianeta, riducendo l'impronta ambientale dei cittadini europei, assicurando cibo sicuro e sostenibile e, al contempo, la giusta remunerazione a tutti gli anelli della filiera. Il tutto con un occhio di riguardo per i cambiamenti climatici e gli elementi nutrizionali dei prodotti. Un punto che fa parecchio discutere, accanto all'esplicito sostegno ai sostitutivi della carne e alle proteine 'alternative' da qui al 2023. La strategia sulla sostenibilità 'Dal produttore al consumatore' (letteralmente 'dal campo alla forchetta') avrà in dotazione circa 20 miliardi di euro, tra fondi Ue, dei Paesi membri e di soggetti privati. Non si tratta di obiettivi vincolanti, ma di linee guida per i futuri atti legislativi da concordare con il Consiglio europeo e il Parlamento. Che hanno polarizzato il dibattito, suscitando reazioni contrastanti.

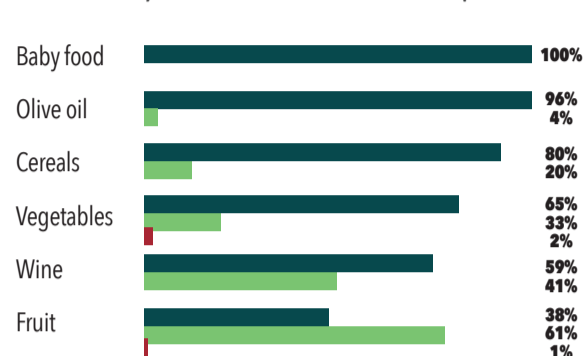


ITALIAN PRODUCTS ARE HEALTHIER AND SAFER

Presence of residuals in agri-food products
(Official controls in EU countries, 2017)



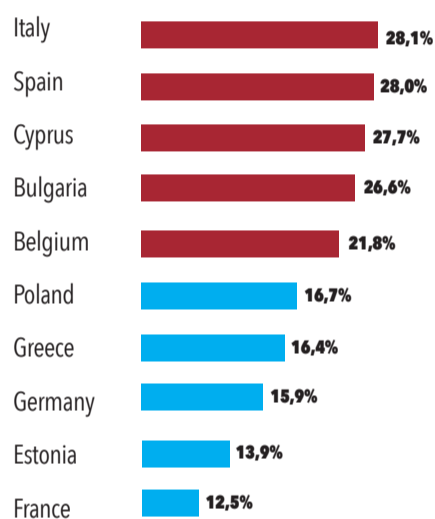
Presence of residuals in agri-food products
(Italy, official controls for different products, 2017)



Source: Nomisma on EFSA on health Ministry data

THE DIFFICULT HANDLING OF WATER

Total water withdrawal/available resources



Agriculture/total withdrawals

ITALY 50%
SPAIN 65%

Source: Nomisma on EEA and ISPRA

DOES THE ITALIAN FOOD INDUSTRY MEET THE TARGETS OF THE EUROPEAN GREEN DEAL?

PROS...

The Nomisma Observatory highlights a good situation for food safety. And Italy obtained some of the best percentages for the number of products that, according to the examinations of the European Food Safety Authority (Efsa), show absolutely no residuals.

The research shows that the Italian average per capita quantity of food waste (126 kg) is 16% lower than the European one and it has been strongly decreasing in the last decade.

Another significant point is represented by the reduction in the quantity of pesticides and fertilizers used by Italian farmers in the last decade, as pointed out by the Institute for the environment protection and research (Ispra). This means insecticides (from 1.2 kg for hectare to 0,6 kg), fungicide (-30%), weedkillers (-20%), but also nitrogen (-25%), phosphorus pentoxide (-36%) and potassium oxide (-50%).

Italian food industry also registers a decrease in the greenhouse gases emissions (-12.3% in the last 20 years according to Eurostat), which represent 7% of the total of emissions against the European average of 10%.

...AND CONS

If in terms of biodiversity and woodlands Italy steadily ranks in the top 5 of the EU countries, data highlights strong difficulties about water. Our country shows indeed an high relation between extractions and water resources, with agriculture that represents half of the total use.

Particularly severe are the data about land consumption, which increased by 50% in the last 30 years, but also about water erosion, for which ranks on the top of the European chart for the damages inflicted to the ground.

ACTIONS

By 2023 (selection)

- Proposal for a legislative framework for sustainable food systems
- Revision of the existing animal welfare legislation
- Revision of the feed additives regulation to reduce the environmental impact
- Requirement for the food industry to integrate sustainability into corporate strategies
- Develop an EU code for responsible business and marketing conduct
- Stimulate reformulation of processed food, including the setting of maximum levels for certain nutrients
- Proposal for a harmonized mandatory front-of-pack nutrition labelling
- Proposal to require origin indication for certain products
- Proposal for EU-level targets for food waste reduction
- Proposal for a revision of EU rules on date marking ('use by' and 'best before' dates)

By 2030 (selection)

- Reduce by 50% the use of pesticides in agriculture
- Reduce by 20% the use of fertilizers
- Cut by 50% the consumption of antibiotics for livestock farming and aquaculture
- Increase by 25% the organic cultivations
- Increase by 30% the protected European rural and sea areas
- Turn 10% of the farm fields into high-biodiversity areas
- Promote plant-based proteins cultivated in the EU



TARALLI ADDICTED

THREE SIMPLE INGREDIENTS MAKE UP THE POPULAR ITALIAN SNACK. SMALL FORMATS, CAPTIVATING PACKS AND ENDLESS FLAVOR POSSIBILITIES BY TERRE DI PUGLIA.

Loved at all ages and latitudes, Tarallo is made with three ingredients: extra virgin olive oil, flour and white wine. In recent years, this traditional Apulian savory snack has conquered the palate of global consumers thanks to its simplicity and versatility: perfect for a break, it's a delicious accompaniment to meals and as an aperitif. Terre di Puglia, a specialist in the production of savory and sweet snacks, also organic and vegan, is one of the main contributors to the success of this typical product of the Apulian territory on a global scale.

With exports accounting for 60% of the company's turnover - grown by two percentage points between January and May 2020 - the Terre di Puglia brand is well recognized in many world countries and in different distribution channels: from food service to large retailers, from normal trade to vending. Besides rail, air and sea transport operators. "This multi-channel approach has always been one of our greatest strengths. Even more in times like the current one, when the global health emergency has caused the shutdown of many big and small businesses," said Nicola Visaggio, owner of Terre di Puglia. "Between January and May 2020, the company's turnover registered a 3% increase compared to the same period last year. A very positive figure and in contrast with the rest of the market."

International by vocation

Terre di Puglia was established 17 years ago with the aim of spreading the knowledge and love for tarallo the world over. "Our distinctive feature abroad has always been the wide variety of flavors and formats available in our range, able to meet the needs of all kind of consumers. We are indeed proud producers of a 'glocal' Tarallo, because while reflecting the quality and tradition of the traditional Apulian Tarallo, it is dressed up with new and innovative colors and flavors," adds Luciana De Bellis, marketing and sales manager.

The company boasts a very wide and diversified range, which has always made of 'positive cultural contamination' its ace in the hole: "One of the products most demand abroad is the 80 gram pack of Tarallino, called 'Millerighe', a snack highly appreciated in the Asian markets and available in 10 different flavors."

Besides product quality, the quality of production processes and services has also contributed to the success achieved by the company on global markets: Terre di Puglia can count on cutting-edge facilities and technologies as well as high safety standards, international certifications (such as organic and kosher), and the ability to maintain relations with customers of every continent. "Features that makes our company a reliable partner all over the world", adds Luciana De Bellis.



Taralli addicted

Un prodotto amato a ogni età e a ogni latitudine. Realizzato con tre semplici ingredienti: olio extra vergine di oliva, farina e vino bianco. Negli ultimi anni, il tarallo ha conquistato il palato dei consumatori di tutto il mondo, grazie anche alla versatilità che lo caratterizza. Terre di Puglia, specialista nella produzione di snack salati e dolci, anche biologici e vegani, è uno dei grandi portabandiera, su scala globale, di questo prodotto tipico della tradizione pugliese.



Although the Coronavirus emergency has struck our country with dreadful force, there are sectors, such as the food sector, which have reacted promptly and decisively to this unexpected challenge. In front of a strong increase in requests from large-scale retailers, and even if forced to operate in a difficult and dangerous context, our companies have continued to guarantee continuity of supplies, both in Italy and abroad, despite the many logistical impediments. The paralysis of the food service has obliged many to diversify their offer and services. And there are still large uncertainties for what is to come in the months ahead. The description of the great and small difficulties faced, day after day, by some of the largest 'made in Italy' agri-food companies directly from the voice of export managers, sales directors and CEOs. Companies that confirm themselves as irreplaceable partners for the global supply chains.

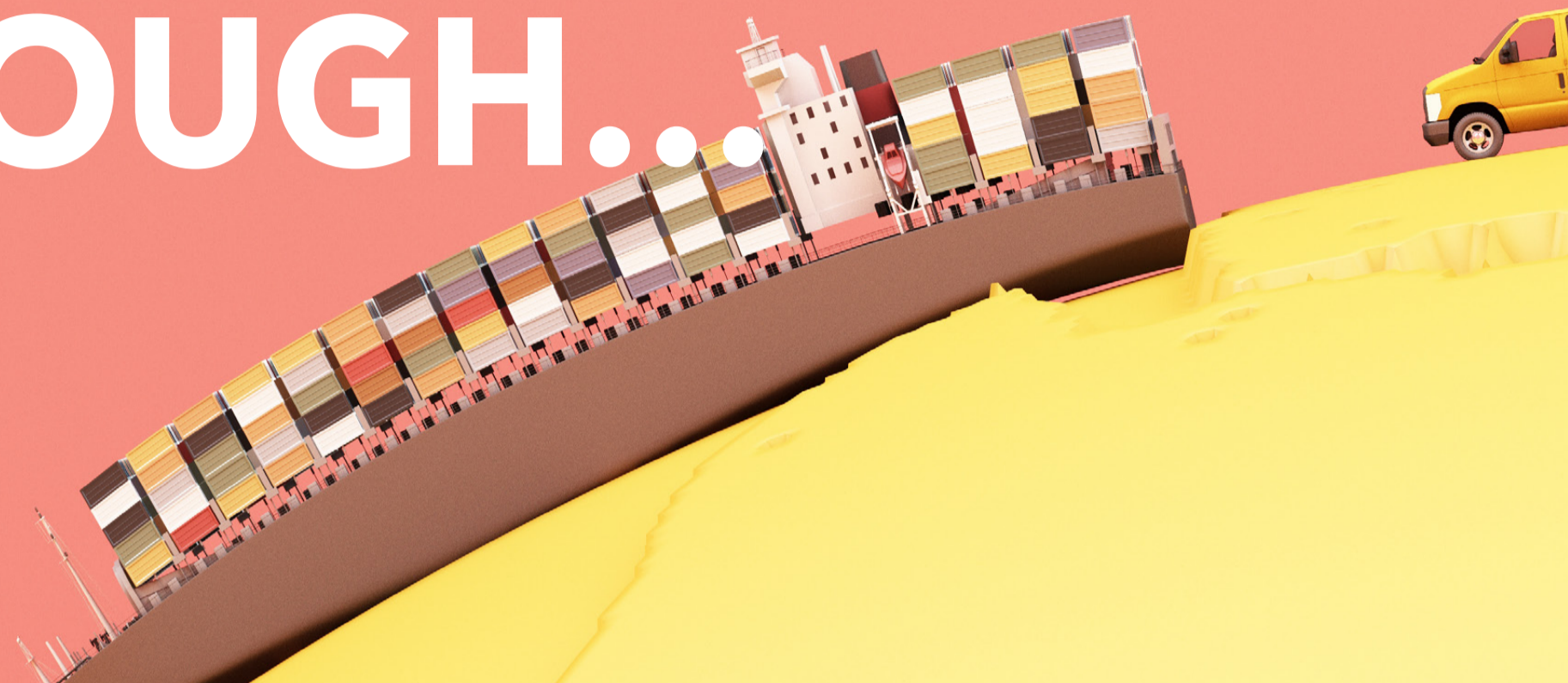
Orgoglio italiano

Benché l'emergenza Coronavirus abbia colpito con particolare forza il nostro Paese, ci sono settori, come quello alimentare, che hanno reagito con prontezza e decisione di fronte a questa inaspettata sfida. A fronte di un incremento significativo della richieste da parte della Grande distribuzione organizzata, e pur se costretti a operare in un contesto difficile e pericoloso, le nostre aziende hanno continuato a garantire continuità di forniture, sia in Italia sia all'estero, nonostante i molti impedimenti logistici. La paralisi del settore Horeca ha obbligato molti a diversificare offerta e servizi. E le incertezze su quello che ci riserveranno i mesi a venire sono ancora molte. In queste pagine, il racconto di quelle che sono state le grandi e piccole difficoltà affrontate, giorno dopo giorno, da alcune grandi aziende dell'agroalimentare 'made in Italy', direttamente dalle voci di export manager, direttori commerciali e amministratori delegati. Aziende che si confermano partner insostituibili per le grandi catene di fornitura mondiali.

follow



WHEN THE GOING GETS TOUGH...



Before the Covid-19 Pandemic, Italian food and beverage exports were flying high. According to data issued by the Istat, Italian National Institute of Statistics, in 2019 the sector's export turnover reached a new record peak with sales of 44.6 billion euro, rising by 5.3% over 2018. Nevertheless, the Coronavirus emergency - which greatly complicates the global economic scenario - has cast a gloomy shadow over the forecasts for 2020. Although there is no lack of orders, companies are concerned about the slowdowns generated, among other things, also by an increase in border controls.

To compensate for what has been lost on the foodservice channel, a significant part of consumption is moving from restaurants and bars to homes, with the large-scale retail trade that is called to respond to a fast growing demand, despite the many problems imposed by the adoption of the necessary safety measures. In the hardest weeks of this unexpected crisis, however, the Italian food industry has given proof of

great flexibility and resistance. Continuing to supply, to the best of its possibilities, clients both in the domestic market and international markets. The situation has differed a lot across the different sector. As the owners, export managers and sales directors of some of the major Italian agri-food companies explain in the following pages of this report.

The export results achieved by Italian agri-food companies in 2019

With the exception of olive oil, whose shipments fell by 8.2%, all the other products of the Mediterranean diet closed 2019 on a rising note. Despite the fear for a hard Brexit and the threat of new tariff from the US, at the end of the year Italian wine, the main driver of our exports around the world, recorder record sales outside national borders, at 6.43 billion (+3.2%).

The best growth rates, however, were displayed by the dairy sector, whose total turnover on global markets reached and surpassed the 3 billion euro threshold. Positive results also for pasta (2.6 billion,

+7.2%), bakery products (2.33 billion, +11.7%), tomato preserves (1.66 billion, +5.5%) and deli meats. The latter, despite the sharp increase in the price of raw materials, closed 2019 with an export value of 1.5 billion euro, up by 1.6%.

The trend of extra-EU trade during the Covid-19 emergency

As shown by the data released by the Centro Studi Confagricoltura, from the comparison of the export values of the first four months of 2019 and 2020, a growth trend emerges (+3.7%). A growth that, nevertheless, has not interested all sectors to the same extent. Looking at the different f&b categories, the most significant increases were related to vegetables (+30%) and meats (+25%); bakery products, processed fruit & vegetables as well as cured meats are close to +15%; olive oil (+11%) and rice (+10%) also did well. Food pastas (-14%), fruit (-9%) and preserved meats (-8%), on the other hand, showed significant decreases.

ITALIAN EXPORT TO EXTRA-EU COUNTRIES

Comparison between Jan-Apr 2019 vs. 2020 (million euro)

	2019	2020	Var. %
Grains	48,3	53,9	+11,5
-of which rice	42,0	46,1	+10,0
Vegetables	75,6	98,3	+30,1
Fruit	244,1	221,8	+9,1
Still and sparkling wines	1000,9	1033,7	+3,3
Olive oil	283,7	315,7	+11,3
Livestock	2,5	2,1	-17,2
Meat and offal	141,7	177,3	+25,2
Flowers and plants	93,8	70,3	-25,0
Edible pasta	438,1	377,2	-13,9
Bakery and confectionery	227,7	262,9	+15,4
Processed fruit and vegetables	360,0	414,1	+15,0
Cheese and dairy products	262,8	268,7	+2,3
Meat preserves	21,4	19,6	-8,1
Deli meats	31,0	35,5	+14,7
Total	3231,6	3351,1	+3,7

Source: Centro Studi Confagricoltura elaborations on Custom data

Monthly percentage variations (Jan-Apr 2019-2020)

	Jan.	Feb.	Mar.	Apr.
Grains	-15,0	+24,3	+15,2	+21,2
-of which rice	-12,0	+19,7	+6,7	+24,0
Vegetables	+19,1	+30,0	+25,9	+46,8
Fruit	-8,1	-7,2	-8,9	-14,3
Still and sparkling wines	+24,2	-1,6	-3,8	-2,7
Olive oil	-5,7	-3,0	+22,3	+31,7
Livestock	+22,8	+0,1	+3,8	+75,0
Meat and offal	+32,6	+19,1	+23,7	+26,6
Flowers and plants	-19,0	-8,8	-32,4	-30,2
Edible pasta	+10,3	+17,9	+24,9	-47,6
Bakery and confectionery	+26,2	+17,6	+6,5	+12,6
Processed fruit and vegetables	+18,2	+5,1	+16,5	+20,6
Cheese and dairy products	+59,8	-13,3	-11,2	-18,6
Meat preserves	+29,2	+2,5	-17,4	-37,0
Deli meats	+24,6	+27,2	+15,7	-3,3

Source: Centro Studi Confagricoltura elaborations on Custom data

DESPITE THE CHALLENGES IMPOSED BY THE PANDEMIC, THE GROWTH OF ITALIAN AGRI-FOOD GLOBAL BUSINESS CONTINUES. IN THE FIRST QUARTER OF THE YEAR, EXPORTS WERE UP BY 3.7% IN VALUE.



Quando il gioco si fa duro...

Le cose andavano tutt'altro che male prima che sull'Italia e sul suo settore agroalimentare si abbattesse la bufera del Covid-19. I dati Istat sull'export relativi al 2019 tratteggiano uno scenario positivo, con un nuovo record del fatturato all'estero che, per il settore agroalimentare, tocca quota 44,6 miliardi di euro, in crescita del 5,3% rispetto al 2018. Come evidenziano i dati diffusi dal Centro Studi di Confagricoltura, dal confronto tra i valori delle esportazioni nei primi quattro mesi del 2019 e del 2020 emerge comunque un trend in crescita (+3,7%). Con differenze tuttavia marcate tra i comparti.

follow

ceucasale.com

TIME IS THE ESSENCE

Botalla knows that time is of the essence, and that is why we let our farmers take all the time they need for the pasture, and later for the milking.

Our Piedmontese valleys provide the ideal conditions so that our milk acquires its high quality.

**Botalla's cheese number one ingredient is time:
The time to create them.
The time to enjoy them.**



THE SURVEY / SWEETS & BAKERY

FIorentINI ALIMENTARI

www.fiorentinialimentari.it

Product name

Organic
SI&NO XXL 160 g

Description

Small corn cakes with pulses from organic farming: not fried, gluten free, no yeast, vegan, source of protein, source of fibre.

Shelf life

12 months from production.



**BROKEN, BUT NOT DEFEATED
BY THE GLOBAL HEALTH EMERGENCY,
THE ITALIAN CONFECTIONERY,
BAKERY AND SNACKS INDUSTRY KEEPS ON
DRIVING ITALIAN AGRI-FOOD EXPORTS.
DESPITE THE SLOWDOWN REGISTERED
IN THE GLOBAL SUPPLY CHAINS
AND THE LOCKDOWN OF ALL FOOD SERVICE
ACTIVITIES LED TO A CONTEXT MARKED
BY UNCERTAINTIES, THE SLOW RECOVERY
OF ALL THE DISTRIBUTION CHANNELS
HAS GIVEN NEW LIFE TO THE SECTOR,
WHICH IS READY TO START AGAIN
WITHOUT UNCERTAINTIES.**

GERMINAL ITALIA



www.germinalbio.it

Product name

BioJunior Line

Description

BioJunior is a line of organic products for early childhood. Plain biscuits (7 months+) and apple biscuits (10 months+) are eggs free, with no added salt and fortified with Vitamin B1. Blueberry bar (10 months+) is dairy free, eggs free, with no added salt, sweetened with apple juice and fortified with Vitamin B1.

"Our international business in the first quarter of 2020 has been substantially stable. Just in some countries, in the very first part of their lockdown, we experienced a slowdown in volumes, probably determined by the state of emergency in which retailers were operating. The situation, however, has quickly returned to the volumes of our consolidated commercial relationship and today we have resumed our growth," underlines Elena Dzyuba, of the marketing office of **La Pizza+1**. For the Piacenza-based pizza specialist, it is fundamental to provide customers with a punctual and efficient service: "We have always managed, even in the most difficult weeks, to ensure the regular delivery of orders."

No problem in deliveries, despite some initial tension, even for a major Italian confectionery company, **Lago Group**: "Thanks to the highly automated systems in our two processing facilities, in compliance with the safety and hygiene standards demanded in such an emergency situation, the company has never stopped producing," highlights the chief commercial officer, Francesco De Marco, who is confident in a rapid recovery of international trade. "In the first part of the year we had a double-digit growth, mainly driven by some European countries, by the markets of the Middle East and Southeast Asia. The US market has undergone a downsizing, but we expect a rapid recovery by the end of June."

Roberto Renna, director of operation at **Puglia Saporì**, also hopes for a rapid recovery of global trade. "Like many other companies, our business was affected by the current health emergency too. Abroad, our products are mainly directed to Central-Northern and Eastern Europe and to the United States. All areas that have been - more or less - severely impacted by the Covid-19 crisis, which directly affected stock rotations."

Uninterrupted production, even in the toughest months of the emergency, for **Fiorentini Alimentari**, as the export manager Simona Fiorentini explains: "Although we have always continued to work, international sales experienced a 30% drop due to an initial 'distrust' toward Italian pro-

ducts." The paralysis of a key distribution channel like food service also contributed to such a decrease in exports, the manager explains: "Abroad, we supply restaurants and vending machines with single-serve snacks. The closure of all commercial activities has therefore influenced the sales decrease registered by these products."

Francesco Tavoletti, export manager at **Molino Spadoni**, shares the same opinion. Despite the problems experienced in the first quarter of the year, the company recorded a 30% growth: "During the lockdown, which affected several countries almost simultaneously, the food service channel has undergone an important setback only partially compensated by large scale retailers and, in particular, by cash & carry players which have increased their demand. The closure of restaurants and shops has particularly affected some countries, such as Spain. This led to a slowdown in the rotation of some products in our assortment."

The guarantee of food safety standards requested, a further improvement in sanitization processes and strict controls on both raw materials and finished products have been fundamental for all producers. As **Germinal Italia** explains: "In regard to orders, after a first moment in which customers asked for big quantities to secure their stock, there was an adjustment of sales rotations. On the other hand, the demand from the Chinese market for our range of products directed to children has substantially increased. Products belonging to the BioJunior brand are perceived as safe thanks to the quality of the ingredients and the strict controls carried out during the production process", explains Elisa Zamperoni, export and PL manager at Germinal Italia.

For the **Vicenzi Group**, a confectionery specialist whose products are distributed in more than 100 world countries, China was instead the only market experiencing a slowdown in the first months of the year: "A slowdown that now seems to be overcome, with gradual recovery", the export marketing manager, Simona Marolla, highlights. "As regards exports, the main issues were connected to a general slowdown in the

INDUSTRIA DOLCIARIA BORSARI



www.idbgroup.it

Product name

Easter cake with Limoncello cream

Description

Shopper

Shelf life

210 days.



most delicate phases of production, and in the delivery of goods, as there were delays in the departure of the ships." A problem highlighted also by Marco Zubani of **Valledoro**: "We delayed some deliveries due to stops and checks at customs between states and the lack, in some situations, of available carriers."

The Ceo of **Industria Dolciaria Borsari**, Andrea Muzzi, did not encounter any significant problem in fulfilling its orders: "If we consider that abroad orders are made earlier with respect to Italy, we had no great problems in selling to retailers and to other market operators. The sell-out performance has instead differed from country to country, mainly due to the adoption of restrictive measures and lockdown policies. For us, it could translate into greater caution in future assortments."

Terre di Puglia, specialized producer of sweet and savory snacks, was among the companies that, even during the Coronavirus emergency, recorded significant growth: "Between January and May 2020, turnover increased by 3% compared to the same period last year and the inci-

dence of exports on turnover increased by 2%. A very positive result, and in contrast with the rest of the market," explains the owner, Nicola Visaggio. Hence, the company has always relied on different distribution channels: "In such difficult months, which have put more than one company in the sector in serious difficulty, this plurality has allowed us to achieve an important growth, like the one registered in the large-scale retail."

The trend was positive also for the Vicenza-based company **The Bridge**, which in March recorded a significant business increase: "It was determined by the fact that foreign customers increased stock volumes because they feared the closure of borders. Besides of that, as bars and restaurants were closed, food consumed at home and consequently the sales of supermarkets have increased", explains the Ceo, Marco Negro Marcigaglia. "After March, the volumes returned to pre-Covid levels. We registered delays in transports, mainly to Eastern European, but in the end we always managed to deliver our goods to all of our customers."

LA PIZZA +1

www.lapizzapiuuno.it

Product name

The authentic crunchy Genoese Focaccia

Description

Tasty and fanciful, handmade in the company's baking laboratory in the province of Genoa, it is made with natural ingredients only and without preservatives. An authentic, ancient recipe that faithfully interprets the Ligurian tradition. Three flavors to satisfy various tastes. The three recipes are available in 100 and 250 g packs, wrapped in a bag and protected by plastic tray.

Shelf life

120 days.



VALLEDORO

www.valledorospa.it

Product name

Risibisi rice and teff

Description

Extruded snack made of rice and teff, gluten-free.

Shelf life

8 months.



VICENZI

www.matildevicenzi.com

Product name

5 o'clock Tea Time tin

Description

Matilde Vicenzi has created an assortment of special and delicate pastries in an elegant and classy tin, to enjoy at home or as the ideal gift. A special selection of cookies that enhances the different flavors and satisfies all tastes. Excellent cookies in an exclusive tin, a tribute to the Italian fine pastry tradition with a woman's touch.

Shelf life

12 months.



PUGLIA SAPORI

www.pugliasapori.com

Product name

Puglia La Merenda

Description

The combo snack designed for the little consumers: thanks to its compact and practical packaging, it is the ideal solution for all parents who are looking for a healthy and genuine snack for their children to always carry with them. Each cardboard box contains a single portion of 40 g of EVO oil Puglia Sapori Tarallini, a 125 ml Il Giardino dei Sapori peach smoothie (95% fruit) and a fun collectable Trulli Tales eraser.

Shelf life

12 months.



MOLINO SPADONI

www.molinospadoni.it

Product name

Ovenable gluten-free Pizza Margherita

Description

Gluten-free Pizza Margherita, packaged in the ovenable food film, cooks directly in the special oven bag with an anti-contamination barrier. No contamination, no oven cleaning, no need for a dedicated oven.

Shelf life

12 months.



LAGO GROUP

www.lagogroup.it

Product name

Mini Roll Wafer

Description

Rolled wafer bites. New food form, new texture and new flavours in the wafer shell.

Shelf life

18 months.



TERRE DI PUGLIA

www.terredipuglia.it

Product name

Taralli Gourmet 150 g box

Description

Terre di Puglia presents the new Taralli Gourmet Box range, made of four different flavours: classic; fennel; onion; cheese and pepper. Sold in an elegant box, they represent all over the world the most typical Italian snack.



follow

#PERFECTTOMATCH

RICOTTA UHT



STERILGARDA.IT

#PERFECTTOMATCH

MASCARPONE



STERILGARDA.IT

THE SURVEY / PASTA, GRAINS & PULSES

PASTIFICIO ATTILIO MASTROMAURO GRANORO

www.granoro.it



Product name

Penne BiRigate Granoro Dedicato Integrale

Description

100% Apulian durum wheat wholemeal semolina pasta, bronze drawn, rich in fiber, with wheat germ, nutritionally complete.

Shelf life

36 months.

MASTER

www.mammaemma.it



Product name

Gnocchi stuffed with tomato and mozzarella

Description

The only stuffed gnocchi made with 100% real, fresh potatoes. Made with only natural ingredients, these gnocchi are a tribute to Italy's favorite pairing: tomato and mozzarella. The use of fresh potatoes gives these stuffed gnocchi a pillow-like feeling, keeping

them always soft. Ready in 3 minutes, they can be cooked directly in the pan, without the use of boiling water.

Shelf life

60 days refrigerated; 18 months frozen.

PEDON



www.pedon.it

Product name

'I Pronti' Pedon

Description

A family of innovative products that satisfies all palates. Three categories for any meal of the day: pulses, grains, mixes of grains and pulses. Steamed naturally without additives or preservatives to maintain all the nutritional properties of a healthy and genuine product. Prepared with Italian extra-virgin olive oil, they are perfect for hot or cold recipes. Packaged in a handy microwaveable doypack, these ready-to-use products do not require draining.

Shelf life

18 months.

THE POSITIVE TREND EXPERIENCED BY THE EXPORTS OF ITALIAN PASTA IN RECENT YEARS HAS CONTINUED UNINTERRUPTED. A PRODUCT THAT, EVEN MORE IN TIMES OF CRISIS SUCH AS THE ONE WE ARE LIVING, IS A 'SAFE HARBOR' FOR LARGE-SCALE RETAILERS. THIS WAS WIDELY PORTRAYED BY THE PHOTOGRAPHS TAKEN DURING THE MOST DIFFICULT DAYS OF THE COVID-19 EMERGENCY, SHOWING EMPTY SHELVES. A SITUATION THAT HAS OCCURRED BOTH IN ITALY AND ABROAD, WITH THE MAJOR WORLD RETAIL CHAINS DEMANDING FOR AN INCREASE IN SUPPLIES. ALL ITALIAN PLAYERS IN THE SECTOR BENEFITED FROM THIS UNEXPECTED AND SUDDEN INCREASE IN DEMAND. AS WELL AS PRODUCERS OF CEREALS, LEGUMES AND OTHER COMMODITIES.

"The crisis generated by Covid-19 has determined a further rise in our export", explained Michele dell'Aquila, export manager at **Pastificio Attilio Mastromauro Granoro**. "In times of crisis, pasta always becomes a 'safe haven' and this rule applies not only to the domestic market, but to the international ones as well. The sanitary emergency has overturned the pre-existing balances and overwhelmed global large-scale retailers, which were afraid to run out of stock. This allowed our company to continue to supply its usual partners, and to start new supply partnerships too." Some problems relating to exports have remained: "We face obstacles connected with tariffs, currencies and economics", the export manager explains. "In this situation of emergency, however, we have witnessed a slackening on these issues, which I would call 'common sense'."

The trend recorded by **Master**, the Treviso-based gnocchi specialist was also very positive. "International sales this year marked a 30% value increase over 2019. Much of the increase in turnover was recorded during the first weeks of the Coronavirus emergency, when many customers doubled their orders fearing a possible closure of borders. For Q3 we expect a slowdown in demand, due to the large volumes previously demanded", highlights the marketing director, Alberto Bianco. In the weeks of the sanitary emergency, the company did not encounter major obstacles in foreign trade: "The

only noteworthy difference is the postponement of our entry in one of the most populated and fast developing world countries. A delay that was caused by the general insecurity in that country, and by the need for importers to focus on the continuity of the supplies they already treated. In any case, we hope that we will manage to make the first supply by the end of the year." The fact of relying on a national supply chain has definitely contributed to the company's success over the past weeks. "A very important factor, especially considering the fears of possible borders closure," adds Alberto Bianco.

A positive trend was also registered by **Pedon**, renowned producer of pulses, grains, seeds and derived products. "We have been facing an extraordinary peak of demand starting from the 21st of February onwards", explains the export director, Paolo Pedon. "In March, order collection marked an extraordinary +116% by volume and +105% by value. Dry legumes literally skyrocketed, followed by rice & grains (+70%), pasta (+50%) and ready meals (+35%). Seeds soared about 15%. April and May had more or less the same pace of March." The outbreak of the Pandemic caused a total disruption of the company's plans: "In terms of manufacturing, our plant has worked 24/7 in all production departments and in order to extract more volumes, we had to increase efficiency, e.g. increasing the size of production runs," adds Paolo Pedon. "As regards the sourcing of raw



materials, we mapped suppliers according to their level of criticality (based on multiple factors) in order to have our resources more focused where it really matters. For all imminent threatening situations, a strategy of sourcing differentiation is already being implemented. For the packaging, we had to closely work with all our suppliers and stimulate them to increase the stock of raw materials and keep a close eye to their supply chains." The slowdown faced by all transport services, also due to increased border controls and additional sanitary measure, has in some cases influenced product deliveries, according to the export manager. "As regards land transport across the EU, certain arrangements and specific measures taken by the countries have had a direct impact on freight capacities, speed of processing operations, delivery time and rates. Ports and shipping companies operate despite difficult conditions. Most of shipping lines are adding surcharges as space on vessels tends to be limited and equipment is starting to become scarce, especially for inland pickups. Due to borders bottlenecks and congested customs, slowdowns were expected for all major ports."

With the uplift of the demand, tensions on raw material quotations have started in the market, Paolo Pedon added. "Generally speaking, the more the demand increases, the more prices show a growing trend. From this point of view, legumes, rice and grains/cereals are the crops more affected by these turbulences. Beside the volume effect, the more the virus spreads across the globe, the more various situations are set to disturb the status quo."

With the uplift of the demand, tensions on raw material quotations have started in the market, Paolo Pedon added. "Generally speaking, the more the demand increases, the more prices show a growing trend. From this point of view, legumes, rice and grains/cereals are the crops more affected by these turbulences. Beside the volume effect, the more the virus spreads across the globe, the more various situations are set to disturb the status quo."



THE SURVEY / FRESH PRODUCE

THE SUPPLIES OF ITALIAN APPLES WERE GUARANTEED WORLDWIDE ALSO DURING THE COVID-19 EMERGENCY, ALSO THANKS TO CONSOLIDATED BUSINESS RELATIONSHIPS WITH PARTNERS IN LOGISTICS. AS HIGHLIGHTED BY TWO IMPORTANT PLAYERS OF THE PENINSULA. THE DEMAND FOR PACKAGED PRODUCTS IS RISING FAST IN LARGE-SCALE RETAIL.

"Our sales plan for the past three months has continued regularly without any particular shock," explained Werner Castiglioni, director of the **Biosüdtirol** cooperative from South Tyrol. "The implementation of all safety measures has slowed down production times, and we had to work at 70% of our production capacity, but our customers understood and accepted this situation. For our part, we tried to meet their needs by giving maximum flexibility, as far as possible, in terms of deliveries. By now we have not encountered any major problems in logistics, except towards the

East." First Italy, then also Germany, the United Kingdom and Ireland have started to stock food. "During this period the sales of our organic apples have gone up, while in the following days sales have dropped significantly," the director adds. "In general, since the Covid-19 emergency began, the demand for packaged product has increased. Our latest packaging innovations perfectly meet this need, thus respecting the environment: the foodtainer made out of grass paper and the bags made with sugar cane."

The **Consorzio Melinda** was also satisfied with the trend experienced by

international trade, especially across Europe, as explained by the coordinator of the export department, Stefan Mittermair: "We have witnessed a quick shift of purchases from bulk to packaged products, just like it happened on the Italian market as well. We faced some difficulties on the most consolidated markets, also due to the total shutdown of the Horeca channel. Overall, we are satisfied with the performance achieved." Thanks to long-lasting partnerships with carriers, the Consortium was able to guarantee a continuous service to all customers even during the weeks of emergency.

BIOSÜDTIROL

www.biosuedtirol.com

Product name

Home compostable fruitbags

Description

100% home compostable clear fruitbags. The new, certified eco-bags, totally GMO-free, are made from sugar-cane and thistle and sunflower seed oils. They therefore meet all European requirements for home composting and break down within 180 days. The biodegradable bags are able to contain from 750 g to a kilo of apples.



CONSORZIO MELINDA

www.melinda.it

Product name

Melinda Enjoy & Morgana

Description

Thanks to its extreme juiciness, on the communication materials Morgana is depicted surrounded by an explosion of juice and accompanied by a payoff that reads 'eXtremely juicy'. This apple is also distinguished by its particularly crunchy flesh and its high content of vitamin C. Enjoy, on the other hand, has a skin that tends to pink and a crisp and sweet flesh. As well as its peel, pink is also the colour, which together with Melinda blue, paints its logo outlining a modern and attractive texture for packaging and communication materials dedicated to this variety.



follow



THE SURVEY / DELI MEATS

SALUMIFICIO F.LLI COATI

www.salumificiocoati.it

Product name

High quality slow-cooked ham

Description

A skilful 'slow cooking' process, combined with the care for animals, creates a ham with an exceptional flavour, respecting the original recipe. Made from whole pork legs, in compliance with animal welfare standards.



SALUMIFICIO SAN MICHELE

www.san-michele.it

Product name

Gourmet cured ham 90 g - Truffle

Description

Cured ham flavoured with truffle, produced in Italy, aged for at least 10 months. Sliced and disposed in tray with soft slices. The unit is formed by a rigid thermoformed tray.



TERRE DUCALI

www.terreducali.it

Product name

'Aperitiamo' with Salame Felino PGI, cheese, olives and breadsticks

Description

A simple and elegant black tray with 100% content of Italian specialties. Salame Felino PGI, cured Italian cheese, black and green olives, breadsticks baked in the oven.

Shelf life

45 days.



DURING THE CORONAVIRUS EMERGENCY, THE ITALIAN PRODUCERS OF COOKED AND CURED HAMS, SALAMI, MORTADELLA, SPECK AND ALL THE OTHER DELI SPECIALTIES FOR WHICH ITALY IS WELL RENOWNED ALL OVER THE WORLD, HELD THE 'MADE IN ITALY' FLAG HIGH. WITH THE EXCEPTION OF SOME LOGISTICAL OBSTACLES OR SLOWDOWNS, THE SECTOR HAS CONTINUED TO WORK AND SELL, MAINLY THANKS TO A SHARP INCREASE IN DEMAND FROM BOTH THE ITALIAN AND FOREIGN SUPERMARKET CHAINS, PRIMARILY WITH REGARD TO PACKAGED PRODUCTS.

"The first months of the year have been very positive for the activities carried out on global markets by the companies belonging to our network," explains Costanza Manzini, export manager for **Le Famiglie del Gusto**, that brings together the Italian deli meat producers **Coati**, **Felsineo** and **Salumificio San Michele**, as well as **Felsineo Veg**, specialist in plant-based and organic products. "In the months of the Coronavirus emergency, from March onwards, the normal operations and expected volumes recorded a slowdown, but the companies have always continued to operate, in compliance with the regulations imposed by the emergency, in order to supply their customers." The last months, explains the export manager, were characterized by a shift in the sales channels, which saw a strong increase in the business made with large-scale retail - especially for packaged products - and a severe slowdown in food service. "In some cases - adds Costanza Manzini - such a change required to adapt both offer and services to the different market demands." Thanks to a close collaboration with their logistics partners, the companies of the network were able to guarantee a constant supply even in the hardest moments of the emergency.

Also for speck Alto Adige PGI, the good performances recorded in large-scale retail contributed, during the weeks of crisis, to compensate for the drop recorded in food service. As **Recla**'s export manager, Hannes Jörg explains: "During the Coronavirus emergency, the demand from mass retailers

drastically increased both in Italy and abroad. In particular with regard to fixed-weight products. Other channels, such as cash & carry or food service, have instead suffered a lot." The prosecution of activities beyond national borders was often complicated, also due to some logistical problems, Hannes Jörg highlights: "The temperature controls on the border with Austria caused some delays in deliveries and reduced the capacity of the carriers. However, we have received much bigger orders from our foreign customers, also due to the fear of a possible closure of the borders with Italy."

The strong presence in large-scale distribution allowed **Terre Ducali**, based in the Parma province, to keep on working without significant impediments, both in Italy and abroad. "We were only partially affected by the Coronavirus emergency because most of our business takes place with retail chains that were not forced to close during the crisis," highlights the export manager, Gianluca Armenzoni. "With regard to the European markets, we faced delays in deliveries due to congestion at the borders in the first weeks of emergency. Outside Europe, instead, we have witnessed the complete cancellation of direct flights from Italy to Japan, which resulted in a stop of about two months of our activities in the country." As a further guarantee of complete food safety, Terre Ducali can count on the treatment of products with high pressure (HPP) and on the processing of deli meats in a clean room, "which allows total safety of the finished product", adds Armenzoni.



RECLA

www.recla.it

Product name

Speck Alto Adige PGI - 'Amici in cucina' product line

Description

Recla's product line 'Amici in cucina' is getting a brand-new style and the addition of a new, innovative product, Julienne of speck: thin sticks perfect as a flavory topping on salads, soups or any other light dishes. The two classical products belonging to the line get a new look while the authentic flavor of this specialty is preserved. Recla Cubes of Speck Alto Adige PGI (100 g) and Recla Sticks of Speck Alto Adige PGI (70 g) are now available as twin pack, which makes them ideal also for smaller households.

Shelf life

55 days (for all 3 products).



FELSINEO

www.felsineo.com

Product name

Mortadella 'La Sciccosa', with 100% Italian supply chain

Description

La Sciccosa, mortadella with 100% Italian meat is now signed with the FDI brand (Italian agricultural manufacturers) for a total Italian supply chain guarantee. The brand is a model of ethical management of the entire production chain based on the complete traceability of the raw materials. It also includes important social safeguards, such as fair distribution of the value chain and respect of workers and consumers rights.

Shelf life

180 days.



FELSINEO VEG - FMV

www.felsineoveg.com

Product name

Good&Green turkey flavoured - Gluten free

Description

Tasty gluten free veggie deli slices, high in fibres, low in fat, dedicated to those who follow a gluten free diet. Available in three appetizing versions able to satisfy the most discerning taste buds.

Shelf life

120 days.



follow

ITALIAN EXCELLENCE

For over 50 years, we pursue an aim of first-class and steady quality. Our products can be guaranteed as good and safe because made with the good Piedmontese milk, coming from our controlled and certified protocol chain, straight from the stable to the finished product. Inalpi, since 1966, good, right and safe values.

LATTERIE
inalpi

DAL 1966 VALORI GIUSTI, BUONI E SICURI

www.inalpi.it



THE EXPORT OF ITALIAN CHEESES, WHICH IN 2019 REACHED INTERESTING GROWTH RATES, WAS SEVERELY AFFECTED BY THE COVID-19 EMERGENCY. AMONG THE PROBLEMS MOST REPORTED BY OPERATORS, THE TOTAL CLOSURE OF THE HORECA CHANNEL, FIRST IN ITALY AND, SUBSEQUENTLY, ALSO IN THE MOST IMPORTANT WORLD MARKETS. THE SEVERE SLOWDOWN OF THE TRANSPORT SYSTEM WAS A MAJOR PROBLEM TOO, DUE TO THE LOGISTICS DIFFICULTIES DERIVING FROM THE CLOSURE OF BORDERS AND THE WIDESPREAD FEAR OF CONTAGIONS.

"In January-February 2020 the export of gorgonzola was up by 11%, with great enthusiasm from buyers in adding our product to their assortment," explained Fabio Leonardi, Ceo of **Igor**. "Despite the challenges presented by the Covid-19 emergency and the closure of the Horeca channel, March was also a good month, in which sales were widely offset by the strong growth reported by discounters and by the large-scale re-

tail. The real collapse arrived in April, because of the cancellation of orders by food service operators across Europe." The company faced big challenges in logistics, especially at the beginning of the emergency: "The transporters didn't want to come to Italy due to the fear of borders closure", explains Leonardi. "We had orders ready to be shipped, and this led to changes and delays in production. But this was the case of the

first 10-15 days, after which the whole situation started to normalize."

For **Armonie Alimentari**, international trade in the first two months of the year - and therefore before the beginning of the global health crisis - was on a rising note: "During the Coronavirus emergency we suffered a sharp slowdown, mainly due to the uncertainty of our business partners", explained the president, Gabriele Menozzi. "In



SORÌ ITALIA



www.soritalia.com

Product name

Buffalo Burrata 100%

Description

Burrata with 100% buffalo milk. 125 grams ball in single pot, frozen. Carton box with 6 or 12 pots.

Shelf life

12 months.

GRUPPO FORMAGGI DEL TRENINO



www.trentingrana.it

Product name

Trentingrana aged 30 months

Description

Trentingrana is a PDO hard cheese obtained through curd-cooking process and made exclusively from milk collected in farms of the Trento province, in Northern Italy. Cows are fed with hay and strictly GMO-free feed, without using any silage. This makes Trentingrana a completely natural cheese, made only with mountain milk, salt and rennet. Trentingrana aged 30 months is a limited and exclusive production of the dairies of Trentino, characterized by a special fragrance, a unique aroma, and a taste in perfect balance between sweet and savory.

Shelf life

Wheel: 60 months; vacuum packed: 6 months.

fact, the snack sector seems to have remained stable or even on a growing trend during the lockdown of many countries. This gives us hope. Starting from May, we have seen the first signs of recovery."

The complete stop of restaurants at all levels had a strong impact on the international business of many dairy company in the Peninsula. This is the case of **Brimi**, that abroad mainly serves the food service market. "Due to the Covid-19 emergency and the consequent closure of restaurants, we have suffered a significant drop in orders", underlines Zeno Staffler, key account export for the Bressanone-based company. "The week of March 23rd was probably the worst, after which the situation slightly improved. The countries where Brimi is operating in large-scale retail even showed a positive growth rate."

Diversification across distribution channels was key strategy also for **Sorì Italia**, as explained by the sales manager, Giovanni Boncompagni: "With the exclusion of January and February, months not affected by the pandemic and in which good growth was taking place, exports continued for the retail channel alone, while the Horeca sector

has practically stopped. Our diversification across distribution channels, together with good growth in the retail trade, has limited damages."

At **Inalpi**, based in Moretta, in the Cuneo province, the production facilities kept on working at full capacity, guaranteeing supplies to all customers: "The health emergency caused a first natural slowdown towards the Asian markets and customers in the food service sector," said Matteo Torchio of Inalpi. "Afterwards, the Asian market was also the first to restart: the first signs quickly turned into positive data, and we have a good outlook for the near future. Overall, at least as far as the European large-scale retail sector is concerned, we have experienced a growth in sales and distribution both for Inalpi branded products and for our many Private labels."

No big issues in deliveries, even in moments of greatest difficulty, also for **Arrigoni Battista**, that faced the Covid-19 emergency after a very positive start of the year for foreign trade: "The slowdown started from about mid-March and it was quite significant", highlights the president, Marco Arrigoni. "Not all countries and not all customers have reacted the same way. As it happened

follow



THE SURVEY / CHEESE & DAIRY

INALPI



www.inalpi.it

Product name

New pack - Clarified Butter Latterie Inalpi

Description

Clarified Butter or Anhydrous Inalpi Butter is 100% Piedmontese milk centrifuge cream butter of short and certified supply chain, with 99.8% fat and of course lactose-free. Due to its high resistance to high temperatures, Clarified Butter is particularly suitable for cooking, in the preparation of excellent sweets but also for very light frying or for preparing sauces or creams.

Shelf life

6 months.

IGOR GORGONZOLA



www.igorgorgonzola.com

Product name

New pack - Igor Gorgonzola Dolce and Piccante 200 g

Description

Igor introduces the package graphic restyling of gorgonzola Dolce and Piccante: a new image aimed at enhancing taste, nutritional values and the Italian origin of gorgonzola. The 200 g portion has a resealable pack which helps maintaining the freshness of the product. The lid has been eliminated in order to reduce the plastic use by 30%. Igor gorgonzola is the first cheese certified 'Lfree' - naturally lactose-free and approved by the Aili, Italian Association Lacto-Intolerant.

Shelf life

40 days.

in the Italian market, also international food service operators reduced volumes to a minimum. The retail channel, on the other hand, experienced even a growth just like the organic sector, that posted a double-digit increase."

The main problems encountered by the **Delizia** dairy were connected to logistics, which was "overwhelmed by this anomalous situation", said the company owner, Giovanni D'Ambruoso. "The closure of restaurants, pizzerias and hotels has determined a drop in sales which, for us, has not translated into a reduction of work. We use a perishable raw material and, in order not to damage the farmers who have always granted us the highest quality fresh milk, we felt the moral obligation to carry on the production of some of our products of excellence. This has created a surplus of product that we are aging in our caves."

Slowdowns in the international business for **Caseificio Preziosa**, as explained by the sales director, Gabriele Mendolicchio: "The pandemic has definitely affected our exports in the first four months of the year, and business has stopped almost everywhere. Spain, just like Italy, has suffered total closure of Horeca activities, a little less France and Belgium where we also work in large-scale distribution. Although Sweden did not make any closure, but it stopped as if in suspension".

Exports stuck, in March and April, for **Gildo Formaggi**, "due to the halt of

the Horeca channel and problems connected with the cancellation of many air shipments," explains the company from Lecco, which, however, thanks to the measures taken continues to supply its customers in total safety. Safety guarantees that have allowed the continuation of the activities also for **Latteria di Chiuro**: "Despite a slight initial slowdown, we went back to normality after a few weeks," said the sales manager Graziano Maxenti.

A return to normality is expected, even if "with orders slightly smaller than in the pre-pandemic period," also for **Si.For**. "Until March 16th our foreign business was experiencing good growth, then with the arrival of the pandemic there has been a sharp drop in orders, which lasted for about 30 days", explains the owner, Pietro Pastoia. "We started to see a gradual recovery from late April. Today, we can say that our loyal customers are returning to order frequently." The company has respected the agreements made with farmers, regularly transforming all incoming milk without interrupting the purchase of raw materials: "Given the drop in sales, we have enough product to face the summer/autumn months, when the natural cycle of animals requires that there is no production of sheep's milk."

Exports were down in the first half of the year for **Gruppo Formaggi del Trentino**: "In the emergency situation there were two main issues: first of all a crisis of confidence from foreign cu-

LATTERIA DI CHIURO



www.latteriachiuoro.it

Product name

Panna Ghiotta

Description

Panna Ghiotta is Chiuro Dairy's first creamy dessert. Panna Ghiotta responds to Chiuro's desire to explore the world of flavors and to create new taste experiences by joining the aromas from the mountains of Valtellina to the flavors of the Mediterranean and from abroad.

Shelf life

35 days.

ARMONIE ALIMENTARI



www.armoniealimentari.it

Product name

Parmonie

Description

Parmonie is a naturally unique snack: it's not a chip, nor a cracker. It's not even a biscuit. Parmonie are thin and crispy leaves made with only three ingredients: Parmigiano Reggiano PDO cheese, flour and olive oil. They are oven baked in order to keep them healthy. The flavor is explosive and unique.

Shelf life

365 days.



stomers and consumers, which led to an increase in local supply; afterwards, the great attention paid by foreign large-scale retailers to matters like stores security and the development of new purchasing channels (namely e-commerce, click and collect or home deliveries), thus leaving in the background themes like the search for Italian products of excellence," explains the sales manager, Federico Barbi. Nevertheless, thanks to a continuous dialogue with customers, the sales manager hopes for "a recovery of international trade in the short-medium term."

A greater attention to the local origin of product, at the expense of imports, is affecting the US market closely, according to Davide and Giovanni Guffanti Fiori, of **Luigi Guffanti Formaggi 1876**, according to which 2020 will be "a year of transition", although it started on a high note. "The lockdown, both in Italy and abroad has led to a strong slowdown in consumption - the administrators explain -, which was connected more to logistics rather than to the need for products and service directed to consumers. We have further strengthened and implemented the safety and hygiene protocols, which we applied even before the advent of Covid-19."

The demand from abroad has remained unchanged for the **Alpeker** and **Yogurteria Merano** brands. "Some of our foreign business partners also offer home delivery services, which has

certainly benefited during this period," explained the export manager, Andrea Culos. "Fortunately, since we are talking about ice creams, the long shelf life did not cause major logistical problems and the stocks already ordered were enough to meet the demands. The only difficulties we encountered were connected with the launch of news products and the participation in events, where we enter to present our product range to foreign buyers."

Cooperlat also reported a negative trend in foreign sales in the second quarter of the year: "With the progress of the lockdown," said the export manager, Matteo Morresi, "distributors have stopped all withdrawals. The worst situations were reported in exports to the countries of the European EEC and non-EEC area."

The marketing manager of the **Asiago Cheese Protection Consortium**, Luca Cracco, also expressed concern about the repercussions that the global health emergency will have on the sector: "Unfortunately, we fear that the final results for 2020 may interrupt the positive trend of the first two months of the year, which saw an increase in Asiago PDO exports to its three main outlet markets: the United States, France and Switzerland. In the USA, in particular, we were experiencing a 6.5% increase in value and a 15% increase in volume. A result that is even more positive considering that in the country Asiago PDO is subject to a 25% duty."

LUIGI GUFFANTI 1876



www.guffantiformaggi.com

Product name

Raw goat milk Tometta Valle'

Description

This raw goat milk production allows to identify a type of dairy products characterized by a unique color: the white cosmic milk. White Cosmic Milk is so called because identified by a group of astronomers as the color of the universe, as it would represent the average of the color of the lights emitted by the stars and celestial bodies. A color that is well represented by the Raw goat milk Tometta Valle'.

Shelf life

60 days.

CASEIFICIO PREZIOSA



www.mozzarelladiseriate.it

Product name

Fiordilatte Tradizionale 200 g

Description

Made with 100% Italian milk.

Shelf life

20 days.

COOPERLAT SOC. COOP. AGRICOLA

www.trevalli.cooperlat.it

Product name

Crème Gourmet

Description

Uht dairy cooking cream, 20% fat.

Shelf life

270 days.



ARRIGONI BATTISTA



www.arrigoniformaggi.it

Product name

Spoonable PDO Gorgonzola 200 g

Description

The new size of spoonable PDO Gorgonzola Arrigoni Battista, packed in a 200 grams take away pack, is ideal for grocery shopping in a faster and more comfortable way. The recyclable packaging is visually clear and pleasing. Extremely soft and tasty.

Shelf life

18 days.

YOGURTERIA MERANO

www.yogurteriamerano.it

Product name

Frozen Yogurt Cone and Sticks

Description

Yogurteria Merano presents the new Natural and Forest Fruit Frozen Yogurt sticks and Frozen Yogurt Cone with delicious topping of Blackcurrant, blueberry and pomegranate and chocolate covered crispy waffle. After the success of tubs and single-serve pots, new formats are introduced in the first Italian Frozen Yogurt line made with 75% high-quality fresh mountain milk and yogurt from South Tyrol. Low fat, lactose-free, GMO free and containing live yogurt cultures for a treat that is both indulgent and healthy.

Shelf life

24 months.



THE DANGERS OF LIVING IN A MEAT-FREE WORLD

SOME PEOPLE THINK THAT A WORLD WITHOUT LIVESTOCK WOULD PROVIDE MORE FOOD TO HUMAN BEINGS. BUT A NEW STUDY ISSUED BY FAO SHOWS THAT SUCH A WORLD WOULD JUST BE POORER, AND MORE HUNGRY.

In 2050, the world will count 9.6 billion people, 70% living in cities with an average income almost twice as high as today. As a result, global demand for animal products - first of all meat - will continue to grow and play a critical role in global food security. But livestock use a large share of agricultural land that could be used for crop production, and are often considered a resource drain and poor converters of feed into food products.

Yet, a new study by FAO and published in *Global Food Security* found that livestock rely primarily on forages, crop residues and by-products that are not edible to humans; and that certain production systems contribute directly to global food security, as they produce more highly valuable nutrients for humans, such as proteins, than they consume.

"Animal production, in its many forms, plays an integral role in the food system, making use of marginal lands, turning co-products into edible goods, contributing to crop productivity and turning edible crops into highly nutritious, protein-rich food. Quantifying the land and biomass resources engaged in livestock production and the food output they generate, but also improving our modelling capacity by including trends in consumer preferences, shifts in animal

species, climate change impacts, and industrial processes to improve the human edibility of certain feed materials is arguably basic information needed as part of further research into the challenge of sustainably feeding 9.6 billion people by 2050," said the authors.

Livestock contribution to food security

According to the FAO study, animal food sources make a vital contribution to global nutrition and are an excellent source of macro- and micronutrients. Livestock products make up 18% of global calories, 34% of global protein consumption and provides essential micro-nutrients, such as vitamin B12, iron and calcium. Livestock use large areas of pastures where nothing else could be produced. Animals also add to agricultural production through manure production and drought power. Further, keeping livestock provides a secure source of income for over 500 million poor people in many in rural areas.

In addition, the study determines that 86% of livestock feed is not suitable for human consumption. If not consumed by livestock, crop residues and by-products could quickly become an environmental burden. Animals also consume food that could potentially be eaten by peo-

ple. Grains account for 13% of the global livestock dry matter intake. Some previous studies put the consumption of grain needed to raise 1 kg of beef between 6 kg and 20 kg. Contrary to these high estimates, this study found that an average of only 3 kg of cereals are needed to produce 1 kg of meat at global level. It also shows important differences between production systems and species. For example, because they rely on grazing and forages, cattle need only 0.6 kg of protein from edible feed to produce 1 kg of protein in milk and meat, which is of higher nutritional quality. Cattle thus contribute directly to global food security.

The study also investigates the type of land used to produce livestock feed. Results show that out of the 2.5 billion ha needed, 77% are grasslands, with a large share of pastures that could not be converted to croplands and could therefore only be used for grazing animals.

Steps have already been taken through feed formulation, genetic selection, and better veterinary services to improve FCRs over the last 30 years, the study explains. An improved feed conversion will also reduce livestock's environmental footprint, but continued progress is needed to make the system more sustainable.

I pericoli di vivere in un mondo senza carne

Nel 2050 la popolazione mondiale raggiungerà 9,6 miliardi di persone. Il 70% vivrà in un contesto urbano e avrà un reddito medio doppio rispetto all'attuale. Di conseguenza, la richiesta di proteine animali, in primis carne, è destinata a crescere significativamente. Gli allevamenti sono tuttavia accusati di sfruttare una grande quantità di terreno agricolo e di sprecare il cibo che potrebbe invece essere consumato dall'uomo. False credenze, come evidenzia un recente studio della Fao che spiega perché un mondo senza allevamenti sarebbe solo un mondo più povero, e molto più affamato.

HIGHLIGHTS

Source: Fao

86% of the global livestock feed intake in dry matter consists of feed materials that are not currently edible for humans

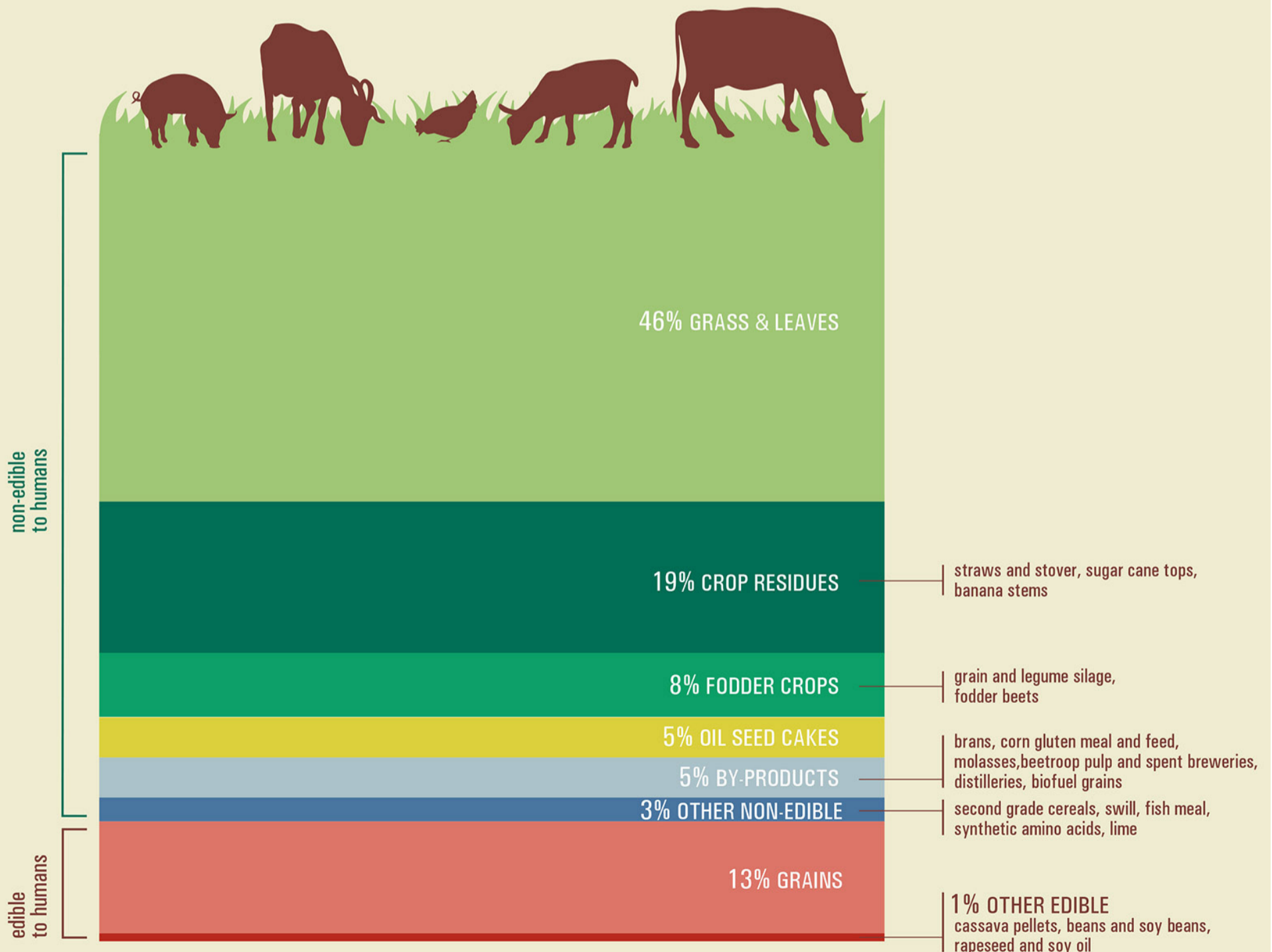
Contrary to commonly cited figures, 1 kg of meat requires 2.8 kg of human-edible feed for ruminants and 3.2 for monogastrics

Livestock consume one third of global cereal production and uses about 40% of global arable land

Livestock use 2 billion ha of grasslands, of which about 700 million could be used as cropland

Modest improvements in feed conversion ratios can prevent further expansion of arable land dedicated to feed production.

6 BILLION TONNES DRY MATTER



A CONTINENTAL-SIZE MARKET

DESPITE SEVERELY HIT BY THE COVID-19 EMERGENCY, BRAZIL IS SOUTH AMERICA'S MOST INFLUENTIAL ECONOMY AND A STRATEGIC GATEWAY TO THE WHOLE LATIN AMERICA. IN THE FOLLOWING PAGES, PRESENT AND FUTURE PERSPECTIVES FOR ITALIAN FOOD MANUFACTURES INTERESTED IN BOOSTING THEIR BUSINESS IN THE COUNTRY.



THE COVID-19 EFFECTS ON THE BRAZILIAN ECONOMY

The Coronavirus pandemic has radically changed the economic outlook. According to the ITA Agency, although it is early to fully assess the economic impact of Covid-19 on the Brazilian economy, some forecasts show that the impact on growth will be severe. The average growth forecasts for private analysts surveyed by the Central Bank stands at -3.8% for the current year, with the most pessimistic forecasting a 7% decrease. The IMF estimate is 5.3% for 2020. The rebound in 2021 will not be enough to allow a full recovery of what lost because of the pandemic, standing at +3.2% for private analysts and at 2.9% for the IMF.

With its more than 210 million inhabitants, Brazil occupies nearly half of the South American continent. Brazil is also the largest economy in Latin America, and one of the largest in the world. According to the data provided by the United States Department of Agriculture (Usda), Brazil's Gross Domestic Product (GDP) closed out 2019 with an accumulated growth of 1.1% compared to the previous year. Although lower than expected, this is the third consecutive expansion in the GDP, which amounted to 1.8 trillion US dollars.

Despite the country has been severely hit by the Covid-19 pandemic, it remains a strategic gateway to the whole Latin America, also for Italian products. Istat/ITA data show a slight recovery in Italian exports to Brazil, which amounted to 3.96 billion euro in 2019, up 2.2% compared to 3.87 billion euro in 2018. Likewise, in 2019 our country recorded a 6.5% decrease in imports from Brazil, which amounted to 3.15 billion euros. Therefore the trade balance, already positive for Italy, rises to 812.6 million euro (it was 509 million in 2018).

In 2019, Italy was the 13th outlet market for Brazilian goods and 5th destination country in Europe after Holland, Germany, Spain and Belgium. To Brazil, Italy is the 9th major supplier (the 2nd among European countries after Germany), with a 2.28% share of total Brazilian imports (Source: TDM, Brazilian Ministry of Economic Affairs).

Un mercato dalle dimensioni 'continentali'

Con oltre 210 milioni di abitanti il Brasile ha, di fatto, le dimensioni di un sub-continente. E in questo gigantesco Paese, il valore delle importazioni agroalimentari ha toccato, nel 2019, gli 8,2 miliardi di dollari. Benché Argentina, Uruguay, Paraguay e Stati Uniti siano saldamente in testa alla lista dei principali Paesi fornitori, in alcuni settori l'Italia presenta interessanti quote di mercato. In particolare, il 16,7% dei vini importati dal Brasile proviene dall'Italia. Una percentuale che si attesta al 16,4% per la frutta e al 12,8% per le paste alimentari. Benché pesantemente colpito dagli effetti della pandemia da Covid-19, il Brasile si conferma quindi una porta d'accesso privilegiata per tutta l'America Latina.

FACTS & FIGURES

- o Population 209 million
 - o GDP 1.8 trillion dollars
 - o GDP per capita 8.742 dollar
- source: lbge

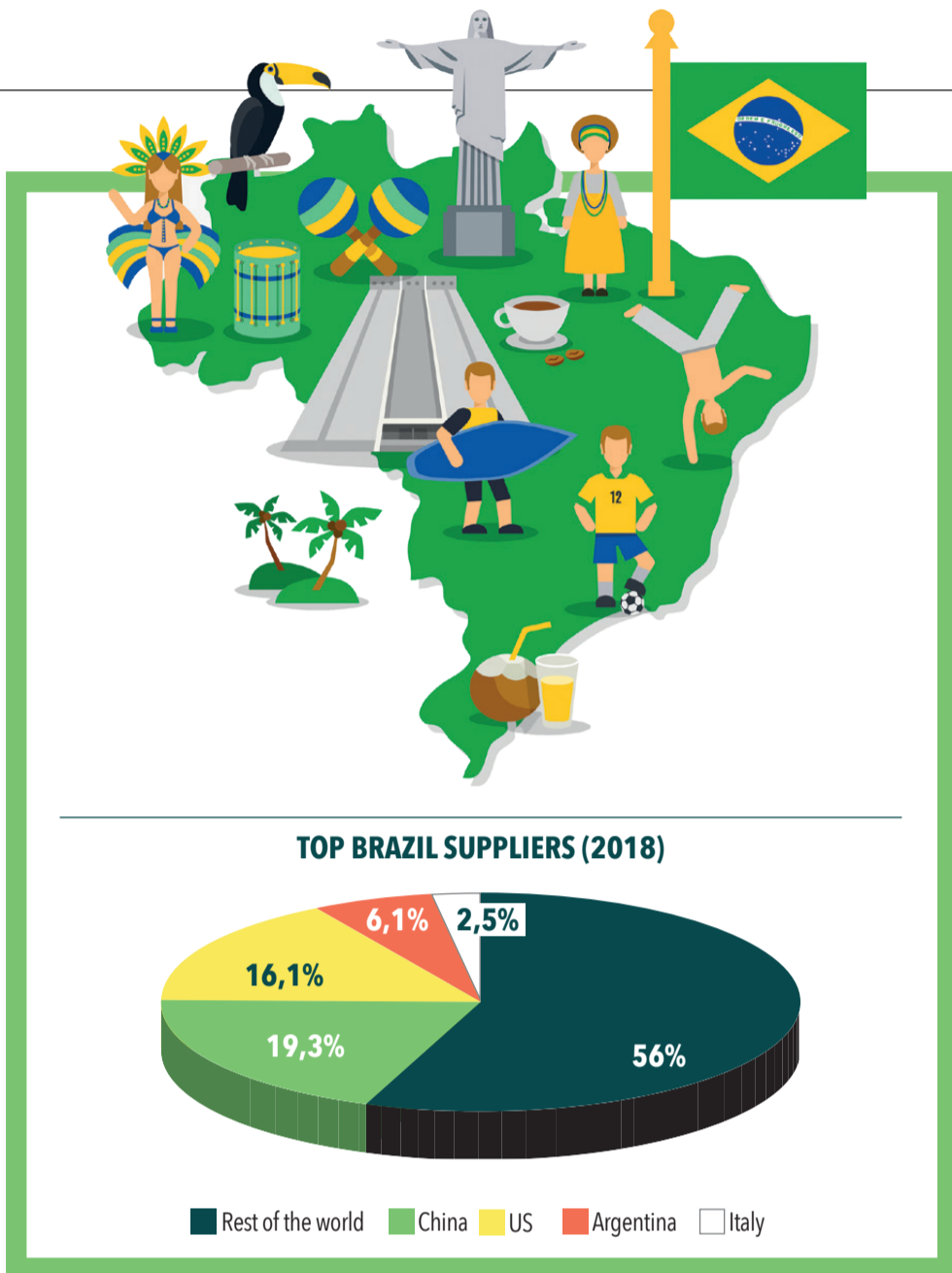
Food industry by channel (2019)

- o Food industry output 177 billion dollars
- o Food exports 34 billion dollars
- o Food imports 5 billion dollars
- o Domestic market 141 billion dollars
- o Retail 95 billion dollars
- o Food service 46 billion dollars

Top 10 country retailers in 2018

- o Carrefour
- o Grupo Pao de Acucar
- o Walmart Brasil
- o Cencosud Brasil
- o Irmaos Muffato
- o SDB Comercio de Ali
- o Supermercados BH
- o Companhia Zaffari
- o Sonda Supermercados
- o DMA Distribudora

Source: Usda



MACHINES AND EQUIPMENT: PRE & POST COVID-19 OUTLOOK

As often happens, after a period of downturn the capital goods sector is the first to be hit. This happened in Brazil too, where the crisis experienced between 2014 and 2015 severely affected the whole industrial sector and, as a consequence, also Brazilian imports of machines and mechanical equipment. Imports dropped from 29.3 billion dollars in 2013 to 14.2 billion dollars in 2017. Starting from 2017, the country experience a more stable scenario from both a political and economic point of view, and therefore imports started growing again, at a rate of 10.2% in 2018 and 13.6% in 2019. In 2020, investments in capital goods were expected to keep on growing between 12 and 15%, to around 20-21 billion dollars, thus returning to pre-crisis levels. Nevertheless, the Covid-19 pandemic has determined a strong slowdown in the world economy and almost all industrial segments have postponed their investment plans to a later date, also in Brazil.

In spite of that, the country remains an important market for Italian manufacturers of machinery and mechanical equipment. Destination of 1.46% of Italian exports in the sector, it currently represents the 15th largest market in the world and the 2nd in Latin America after Mexico, whose market share is 1.61%. To Brazil, Italy is the 4th largest supplier, with a 6.1% share on total imports of machinery and mechanical equipment, which is worth 1.1 billion dollars.

Source: IFA

follow

*Orfeo is
our influencer.*

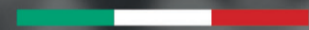
When it comes to Asiago Stagionato PDO, we place our trust in Orfeo, who continues a centuries-old cheese-making tradition in Vicenza. Agriform is a cooperative company that partners with some of the top dairies in Northeastern Italy; we oversee every step in the production process to ensure our highest quality cheeses.

ORFEO PICCOLI
ASIAGO STAGIONATO PDO
CHEESE MAKER



AGRIFORM

discovering Italian cheese



www.agriform.it



THE BRAZILIAN FOOD INDUSTRY

Market size

Brazil is one of the major world players in the food processing industry. The sector is responsible for 10% of the country's GDP and employs 1.6 million workers. The country is also home to 12% of global water resources and is the main world producer of coffee, soy, bovine meat and orange juice. It is also the second largest producer of chicken meat and sugar; the third of fruit and maize. In 2019, Brazilian food industry sales amounted to 177 billion US dollars (699 billion reais), an increase of 7% compared to the previous year. This outstanding result is due to several economic and social factors, including the relatively low interest rates and inflation being at the lowest levels in years.

For 2020, the food industry is expected to keep growing as the Brazilian economy slowly recovers from the recession, though it is still uncertain how the Covid-19 outbreak will affect the market. The pandemic is indeed expected to cause severe economic impacts in the country, leading to higher

risk aversion from importers.

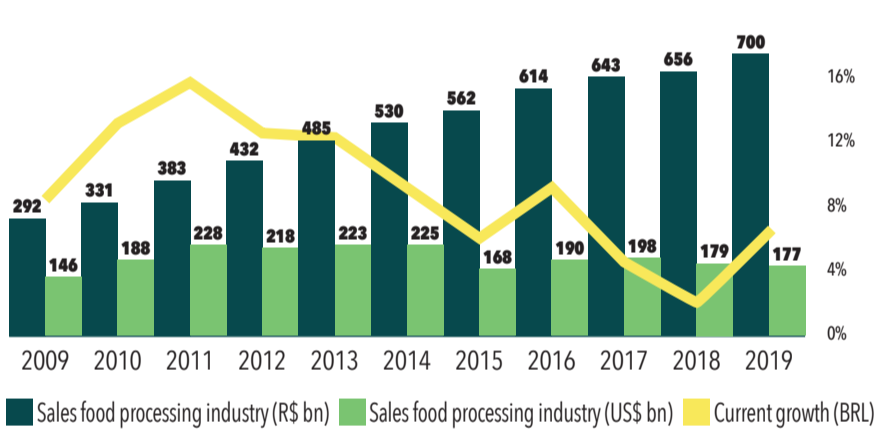
Imports-exports: the state of the art

In 2019, the country's agri-food imports totaled 8.2 billion dollars, up 1.36% over the previous year. Imported products therefore represent 9.4% of the market. The main imported food categories are cereals (26.2%), vegetables and preparations (13%), animal and/or vegetable fats or oils (11.2%), malt and wheat flour (9%) and fruit (7.5%). Alone, the latter accounts for 66.9% of Brazilian imports of food and drinks. Other categories with a significant share on imports are wines (4.5%); cocoa and preparations (3.9%) - where Italy is the 3rd largest supplier, after Ivory Coast and Argentina, with a 6% share -; milk and milk cream, also with the addition of sugar (3.0%), supplied almost exclusively from Argentina and Uruguay (94%); preparations based on cereals, flour, starches, starch or milk, including bakery products and pasta (2.7%) - with Argentina (26.8%), Italy (18.6%) and Germany (11.8%) as main suppliers -; coffee and tea (1.47%), whose main supplier is Switzerland (43.7%);

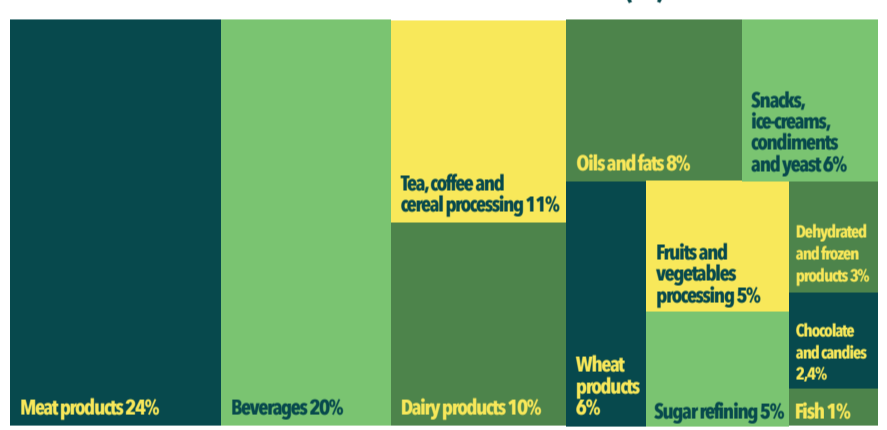
cheeses and dairy products (1.44%), whose main suppliers are Argentina (60.6%), Uruguay (20.6%), France (5.8%), the Netherlands (5.47%) and Italy (3.5%).

Brazil's main food & beverage supplier is Argentina, with a 37.7% share. It mainly supplies cereals (47.7%), vegetables and preparations (16.8%), malt and wheat flour (11.7%) and fruit (5.9%). Follow in importance the other two countries that make up Mercosur, namely Uruguay (6.9%) and Paraguay (6.2%). The United States, Brazil's major supplier of cereals, is 5th in the ranking, with a 4.9% share in 2019, followed by Portugal (4.81%), Chile (4.75%), Spain (3, 43%) and Italy (2.8%). Chile exports mainly wine (36.7%) and fruit (33.9%) to Brazil, while Portugal, the country's major supplier among Eu countries, exports olive oil (67.5%) and wines (13.2%). Spain mainly provides Brazil with fruit (25.5%), olive oil (22.1%) and vegetables (17.7%). Italy supplies a varied basket of products, with wines accounting for 16.7% of total imports from Italy, fruit for 16.4% and pasta for 12.8%.

FOOD PROCESSING INDUSTRY SALES



SHARE OF SEGMENTS IN THE BRAZILIAN FOOD PROCESSING INDUSTRY BY GROSS SALES (%) IN 2019



Source: Brazilian Food Processing Industry (ABIA)

Food retail

The Brazilian Supermarket Association (Abras) reported supermarket revenues of 97 billion US dollars in 2018, 5.2% of the country's GDP. This represents an increase of 0.8% as compared to the previous year. The number of retail stores has been stable in the past years, comprising around 89.4 thousand outlets. However, in the last three years the food retailing sector saw a significant increase of the cash & carry format, as consumers' purchasing power was constrained during the economic downturn. Approximately 80% of food and beverage distribution takes place through retail stores.

Food service

According to the Brazilian Food Processors' Association (Abia), there are approximately 1.3 million foodservice outlets across Brazil, with over 95% of establishments characterized as small-to-medium size, family-owned operations. Large and multinational foodservice chains represent less than 5% of food service companies. In 2018, the food service sector purchased 47.2 billion US dollars. Abia estimates total revenues of the Brazilian food service sector at 117 billion US dollars. Restaurants and fast food chains detain the lion's share of 35% of the segment, followed by bakeries (15%), bars (13%) and snack bars (11%), institutional catering (7%), hotels and motels (4%) and air catering (2%).

Source: Usda

TIPS FOR EXPORTERS

Products present in the market which have good sales potential

Food preparations • Animal feed preparations other than dog or cat
 • Enzymes and prepared enzymes • Other edible food preparations of fats, oils, etc.
 • Odoriferous substances • Essential Oils • Hop cones, in the form of pellets • Peptones and derivatives • Mucilages and thickeners • Vegetable saps and extracts of hops

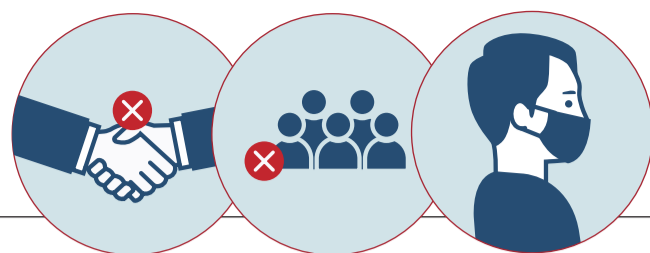
Products not present in significant quantities but which have good sales potential

• Wheat flour
 • Malt, not roasted • Nuts (almonds, pistachios, walnuts, coconuts)
 • Fruits (cranberry, blueberry, cherries, pears) • Dairy ingredients
 • Vegetable oils • Ingredients for healthy and organic products

Products not present because they face significant barriers

• Products with a phytotherapeutic compound cannot be considered as food or a food ingredient; therefore regulations do not allow them in food products ingredients with medicinal properties • Considerable restrictions exist for products containing ingredients derived from biotech commodities • U.S. poultry and pork do have market access

Source: Usda



LET'S RESTART (SAFELY)

SANITUNNELS, THERMO SCANNING SYSTEMS, SCHEDULED ENTRIES AND DIGITAL SYSTEMS FOR THE COUNTING OF PEOPLE AT BOOTHS. ANTONIO CELLIE (CEO OF FIERE DI PARMA) AND CORRADO PERABONI (CEO OF IEG) PRESENT THEIR NEW CORONAVIRUS-PROOF TRADESHOW MODELS.

During this crisis it was clearer than ever that 'creativity' and 'solutions' are the keywords to come out from such a difficult situation. Because it is necessary to believe in the impossible to make the world 'work' again. Tradeshows are now between the trickiest issues. As a fundamental element for economy, they represent a key moment to connect the different players of the sector. And, for Italian companies, they serve as a strategic opportunity to present their products across the world.

But how is it possible to match these events, which host thousands of people, with the fear of Covid-19 contagion and the measures imposed by the Government? For many, it is an impossible challenge. For few, the most far-sighted, it is a 'provocation' that needs to be responded and solved. This is the case of two discerning teams, lead respectively by Antonio Cellie, ceo of Fiere di Parma, and Corrado Peraboni, ceo of IEG (Italian Exhibition Group), the organization that manages the exhibitions of Rimini and Vicenza. Both abandoned the idea of creating digital shows and they are ready to bring back the 'traditional' exhibitions, but in total safety, already in September.



Antonio Cellie



Corrado Peraboni

can discuss about the future. It will be both a physical and digital event (they will be livestreaming it) which will take place in the Fiere di Parma exhibition centre, in a hall specifically structured to host a scheduled number of visitors and key speakers, in accordance with the most advanced safe&security standards. But if this can be seen as a prep test, the real bet is represented by the following appointment in Parma's exhibition centre: Salone del Camper (the Camper's Tradeshow), which will take place from 12 to 20 September and will host thousands of people, by managing every moment and aspect of the event in total safety. But how? With a grant of one million euros, Fiere di Parma developed a 'Covid compliant' system to host exhibitors, visitors and speakers. Among the management protocols, they will sanitize people at the entrance with a tunnel supplied with a nebulized cleaning solution and called 'Sanitunnel', but also with temperature measurement, online numbered

pre-sales and regulation of the entries.

With sure data it will be possible to control precisely people's movements. For example, thanks to an infrared technology they will be able to count the number of people in a certain hall and block the entrance when they reach the maximum number.

The #safebusiness project by IEG

Corrado Peraboni, ceo of IEG, immediately answered the call of the companies who have been asking for the help of exhibitions and congresses in order to boost their business. In accordance with sanitary measures and the documents drawn up by Aefi (the association of the Italian exhibition industry), Federcongressi, Ufi (the global association of the exhibition industry) ed Emeca (European major exhibition centres association), IEG outlined a project divided per sector and providing with more than 50 guidelines.

Here are some. 'Prior to the trade show': convention with bike

sharing companies, online ticket sale and scheduled entries. 'At the entries': face masks distribution, thermo scanning system, sanitization route, open and no-handles access doors, dematerialized entry tickets. 'In the expo centre': calculation of its capacity in relation to distancing regulations, hand sanitizer dispensers throughout the area, extended opening hours prolonged on the days when more public is expected, flow management with centralized digital tracking, contactless payments systems, evolved fittings with safe, Covid-free materials. 'Catering': payments through skip-the-line apps, digital menus, disposable materials. 'Services': sanitized shuttle connection equipped with hand sanitizer, wardrobe with automatic rack and disposable coverings, bathroom facilities with constant sanitization, conference rooms with seating layout to guarantee social distancing and exclusively digitalized informative material. 'Accessibility': transparent face masks for speaking with the hearing-impaired, supply of assistance equipment (wheelchairs, etc.) sanitized before and after each usage. 'Special actions': constant sanitization throughout the centre; filters, air-conditioning and heating channel sanitization and frequent air exchange; medical room and isolation zone for possible suspected cases; crisis management protocol. IEG employees and trade show staff will be trained to guarantee in order to carry out their duties in safety. In addition, about employees, Lorenzo Cagnoni, IEG president announced that the company has also decided to adopt a voluntary mass serological screening.

Ripartire in sicurezza

Sanitunnel, termoscanner, ingressi controllati e sistemi digitalizzati per il conteggio delle persone negli stand. Antonio Cellie (ad di Fiere di Parma) e Corrado Peraboni (ceo di IEG) presentano gli spazi fieristici ai tempi del Coronavirus.

FOOD SECURITY

Listeria risks the remedy is HPP



The power of the High Pressure

HPP ITALIA, your reliable partner able to provide the innovative hyperbaric **HPP** treatment for all perishable products.

- ✓ Brand protection
- ✓ H24 Security
- ✓ Export no limits

In **HPP ITALIA** we treat the products at very high hydrostatic pressure (thousand atmosphere) inducing in this way the bacterial inactivation: an innovative cold process thanks to which food, stabilize and safe, keep unaltered its precious nutritional and organoleptic elements.

Thanks to the **HPP technology (High Pressure Processing)** your products can increase their shelf life safely!

We were first in Italy to provide the High Pressure Treatment for third parties and we guarantee maximum confidentiality.

Discover more about the extraordinary potential of our **HPP** treatment booking your free tests on hppitalia.it.



HPP Italia srl
Parma - Italy - info@hppitalia.it

 **HPP**ITALIA
FOOD SAFETY