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THE ITALIAN FOOD

BUYER'S • GUIDE

YEAR 8 - N° 8/9 • OCTOBER/NOVEMBER 2020
MANAGING DIRECTOR: ANGELO FRIGERIO



UN SAPORE CHE TI PUGLIA

Burrata Frozen

Longer-lasting goodness.



Burrata Frozen is the original speciality from Puglia: a thin outer layer of fresh, firm stretched-curd cheese and, on the inside, a soft centre of cream with the finest shreds of mozzarella. Every Burrata Frozen is also a unique top-quality product, hand-crafted by our master cheese-makers who only work with the very best local milk. The extraordinary flavour of this superb cheese is captured by freezing each individual burrata as soon as it has been shaped, so that its quality and freshness is guaranteed to last for eighteen months.

UN SAPORE CHE TI PUGLIA



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THE INSIGHT

Labels: instructions for use

The debate on packaging is fierce in both the Old and New World. Where communication plays a strategic role. Intermarché's trial, the opinions of some Italian retailers, and the book published by Cass Sunstein.



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CONFECTIONERY

Chocolate: what better treat?

A market worth 2.5 billion euros in Italy and 132 billion dollars on a global scale. The new consumers' tastes and the mega-trends that will shape the category in the next months.



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THE COMPANY

Fattorie Fiandino: Naturally good



The use of vegetal - instead of animal - rennet as an ethical choice. The selection of only Piedmont milk for the production of innovative cheeses and high-end butter. The company presents its unique and nature-inspired product range.

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FOCUS ON

Right where Trentingrana is born (again)



A day in Val di Fiemme, among the mountains where Concast cheeses are produced. The new packaging and the 30 month seasoned products. And all the passion for the dairy art.

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PRODUCT SHOWCASE

What would Christmas be, without a good bottle of Italian wine?

Full-bodied red wines, mineral and elegant white wines, but also the most popular choice for a festive party: amazing bubbles. In the following pages, more than 40 surprising labels that customers around the world will love this December - also as elegant and classy gift ideas. For a memorable, Italian-style Christmas.



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THE INTERVIEW

That's America

Olli Salumeria is a California-based deli meat producer with Italian DNA and a specialization in pre-sliced salami and snacks. The emerging trends in the US market in an interview with the chief commercial officer, Marco Terenghi.

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THE INTERVIEW

"Total quality is our mission"

The rescue of the Kipre Group by the Wrm fund. The relaunch of the Principe and King's brands in Italy and abroad. All the details of the acquisition in an interview with the company's ceo, Walter Bellantonio.



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EDITORIAL

by Angelo Frigerio, managing director

F&B exports: leaving the 'Covid-19 semester' behind

The international wine trade closed the 'Covid-19 semester' (March-August) with an unprecedented contraction. According to the Vinitaly-Nomisma Wine Monitor Observatory, in extra-EU countries overall trade suffered a decrease in value of 15.2%, with an equivalent loss of approximately 1.4 billion euros compared to the same period last year. The worst decrease was recorded by bubbles (-28.8%), which represent 92% of the extra-EU market. In such a bad scenario the Italian wine, despite recording the worst results in 30 years, manages to contain losses and close the half year at -8.6%, after an excellent year start: in the first two months, the trend was +14.5%.

To contribute to the 'maintenance' of our extra-EU wine exports, the slight decline recorded in trade with the United States (at -8.1%) and with Switzerland, where we recorded even positive figures: + 7.5%. On the other hand, exports dropped both towards the United Kingdom (-9.5) and China (-38). As regards the latter country, Italy's 'great antagonist' in the field of wine, France, recorded an identical -38% in the semester, albeit with much more serious consequences: for Italy the deficit was 26 million euros; for France 122

million. The French performance in the semester was critical also in the United States (-40.1%) and in the United Kingdom (-21.6%). As a result, the half year had a significant impact in terms of non-EU market shares between the two market leaders, with France losing 5 points, down to 29.3%, while Italy rose to 23.5%.

Matching the extra-EU export data together with those relating to exports to European countries, however, Italian wine closed the semester at -4.1%, as highlighted by the Ismea research institute. As regards export of Italian food products, instead, the first half of 2020 closed on a positive note, with +710 million euros against the deficit of almost 1.2 billion in the first six months of 2019. On the one hand, in fact, there is the strong growth trend registered by exports in the first two months (+10.8%) and the restart in June (+3%); on the other, the decline in imports: -5.1% compared to the same period of 2019. The final balance of exports stood at 22.1 billion euros in the first half, with a 3.5% growth on an annual basis. A figure that makes the Italian agri-food sector account for 11% of the total exports of goods and services of the national economy.

Semestre Covid-19: l'impatto sull'export f&b italiano

Il commercio internazionale di vino archivia il 'semestre Covid-19' (marzo-agosto) con una contrazione senza precedenti. Secondo le elaborazioni dell'Osservatorio Vinitaly-Nomisma Wine Monitor, nei Paesi extra-Ue gli scambi complessivi hanno subito un calo a valore del 15,2%, con una perdita equivalente di circa 1,4 miliardi di euro rispetto allo stesso periodo dello scorso anno. Il decremento più significativo è relativo alle bollicine (-28,8%), che rappresentano il 92% del mercato extra-Ue. In tutto ciò il vino italiano, pur registrando il peggior risultato degli ultimi 30 anni, riesce a contenere le perdi-

te e a chiudere il semestre a -8,6%, dopo un eccellente avvio di anno. Nel primo bimestre, infatti, il trend segnava +14,5%.

A contribuire al 'mantenimento' del nostro export enologico extra-europeo, il calo contenuto registrato negli scambi commerciali con gli Stati Uniti - che mettono a segno un -8,1% - e la Svizzera, che è addirittura andata in terreno positivo, a +7,5%. Male, invece, l'export verso il Regno Unito (-9,5) e Cina (-38). In riferimento a quest'ultimo dato, la Francia, il 'grande antagonista' dell'Italia in materia di vino, registra un identico -38% nel semestre, pur con con-

seguenze molto più pesanti: per l'Italia il deficit è stato di 26 milioni di euro; per la Francia di 122 milioni. I cugini d'Oltralpe fanno peggio di noi anche negli Usa (-40,1%) e nel Regno Unito (-21,6%). Risultato: il semestre ha inciso notevolmente in termini di quote di mercato extra-Ue tra i due market leader, con la Francia che perde 5 punti e scende al 29,3%, mentre l'Italia sale al 23,5%.

Analizzando i dati extra Ue insieme a quelli relativi all'export verso l'Europa, tuttavia, il vino italiano chiude il semestre a -4,1%, come evidenziano i dati Ismea. Sul fronte agroalimentare, invece, il primo semestre 2020

chiude in positivo, con +710 milioni di euro contro il deficit di quasi 1,2 miliardi dei primi sei mesi del 2019. Da una parte, infatti, c'è la forte crescita tendenziale delle esportazioni nei primi due mesi (+10,8%) e la ripartenza di giugno (+3%); dall'altra, la flessione delle importazioni: -5,1% rispetto allo stesso periodo del 2019. Il consuntivo dell'export si attesta a 22,1 miliardi di euro nel primo semestre, con una crescita del 3,5% su base annua, un dato che consente all'agroalimentare italiano di raggiungere l'11% sulle esportazioni di beni e servizi totali dell'economia nazionale.

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COOKING CREAM

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NEWS

MARTELLI DEUTSCHLAND IS BORN: GERMAN BRANCH OF THE ITALIAN GROUP

The presence on foreign markets of the Martelli Group, a company specialized in the production of meats and deli meats in Italy, is growing thanks to the creation of the German branch. As a result of a deal reached with two local operators specialized in the distribution of Italian food products to Germany - namely Peter Voss and the Betz Holding - Martelli Deutschland was born on the past June. "This is a very important step for our group that we are sure will allow us to increase not only our market shares abroad, but to acquire an important role in a market that will appreciate the great quality of our products", said Nicola Martelli, export manager of the group based in Dosolo (Mantua) and made up of seven production units. According to the agreement, the entire Martelli product range will enter the German large-scale retail channel, both with its own brand and in private labels.

Nasce Martelli Deutschland, filiale tedesca del gruppo italiano

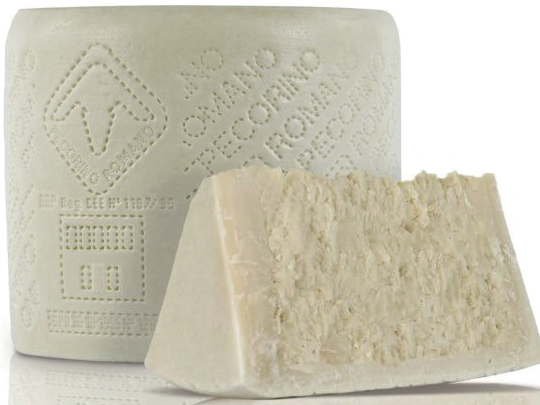
Cresce la presenza sui mercati esteri del Gruppo Martelli, realtà specializzata nella produzione di salumi e carni in Italia, grazie alla creazione della sua prima società in terra tedesca. Dall'accordo con due operatori locali specializzati nella distribuzione di prodotti alimentari italiani in Germania - Peter Voss e la Betz Holding - è nata a giugno Martelli Deutschland. "Si tratta di un tassello molto importante per il nostro gruppo che siamo certi ci consentirà di aumentare non solo le nostre quote di mercato all'estero, ma di acquisire un ruolo importante in un mercato che sarà in grado di apprezzare la grande qualità dei nostri prodotti", afferma Nicola Martelli, export manager del gruppo con sede a Dosolo (Mantova) e composto da sette unità produttive. L'accordo prevede l'esportazione dell'intera gamma di prodotti Martelli principalmente nel canale della Gdo tedesca, sia con il proprio marchio che per i prodotti private label.

PECORINO ROMANO PDO: EXPORTS ON A RISING TREND TO EUROPE, CANADA AND CHINA

Excellent results for Pecorino Romano PDO in the 2019/2020 campaign. Production has grown as well as exports to Europe, Canada and China, while exports dropped to the United States. The trend during the months of the lockdown was also positive: domestic consumption has more than offset the losses registered in food service. "Restaurants don't always choose PDO cheeses, while the final consumers do, because they have an absolute guarantee of quality," explained Salvatore Palitta, outgoing president of the Consortium. "In this regard, we are launching a project dedicated to food service together with Parmigiano Reggiano and Gorgonzola precisely to encourage and enhance the presence of PDOs in restaurants and pizzerias."

Pecorino Romano Dop: cresce l'export in Europa, Canada e Cina

Ottimi risultati per il Pecorino Romano Dop nella campagna 2019/2020. Cresce la produzione e aumenta l'export in Europa e Canada. Ma anche in Cina, dato incoraggiante per la Dop. Cala invece negli Stati Uniti. Positivo anche l'andamento durante i mesi del lockdown, con i consumi domestici che hanno abbondantemente compensato le perdite nella ristorazione. "Non sempre, infatti, i ristoratori scelgono di usare la Dop, mentre il consumatore sì, perché così ha un'assoluta garanzia di qualità", commenta Salvatore Palitta, presidente uscente del Consorzio. "A questo proposito, stiamo avviando un progetto di vigilanza sulla ristorazione insieme a Parmigiano Reggiano e Gorgonzola proprio per incentivare e favorire sempre più la presenza della Dop in ristoranti e pizzerie".



AGREEMENT SIGNED BETWEEN BOLOGNA FIERE AND ALIBABA

The trade show organizer Bologna Fiere and the e-commerce platform Alibaba.com have signed a collaboration agreement to provide Italian companies participating in the events organized by Bologna Fiere with new business opportunities. "The agreement combines the commercial opportunities offered by trade shows (traditional and digital) with the potential of the e-commerce," said Bologna Fiere in a press release. More specifically, companies will have privileged access to the international Alibaba.com platform, where they will present their products to an audience of 26 million buyers active on the marketplace in more than 190 countries.

Accordo tra Bologna Fiere e Alibaba

Bologna Fiere e la piattaforma di e-commerce Alibaba.com hanno siglato un accordo di collaborazione. L'intesa prevede opportunità di business per le aziende che partecipano alle fiere organizzate dall'ente bolognese. "L'accordo combina le opportunità commerciali offerte dalle manifestazioni fieristiche (tradizionali e digitali) alle potenzialità proprie del canale e-commerce", si legge in una nota di Bologna Fiere. Più nel dettaglio, gli utenti avranno accesso privilegiato alla vetrina internazionale Alibaba.com, dove presenteranno i propri prodotti e potranno raggiungere 26 milioni di buyer attivi sul marketplace in oltre 190 paesi.

TONITTO'S SORBETTO IS ENTERING SOUTH AFRICA AND AUSTRALIA

Tonitto 1939, a company specialized in the production of artisanal ice cream and sorbetto, aims at the seasonal adjustment of sales by investing in consumers in the Southern hemisphere. "We have prepared a strategic plan that will lead to a doubling of turnover in the next four years, reaching around 18 million," Luca Dovo, company CEO, explained. "To achieve this goal, we need to intercept the markets south of the equator, focusing on South Africa and Australia. Contacts have already been started with some business partners operating in these two countries and we are confident that in the forthcoming months we will be able to start new partnerships." Tonitto is already distributed in some Far-East markets such as Singapore, Philippines and Taiwan where made in Italy products have a premium positioning. In addition, it already signed distribution agreements in Northern European markets, the Baltic countries and Holland.

I sorbetti di Tonitto alla conquista di Sudafrica e Australia

Tonitto 1939, realtà specializzata nella produzione di gelato e sorbetto artigianale, punta alla destagionalizzazione delle vendite, investendo sui consumatori dell'emisfero australe. "Abbiamo preparato un piano strategico che potrà portarci a un raddoppio del fatturato nei prossimi quattro anni, arrivando intorno ai 18 milioni", spiega Luca Dovo, Ad dell'azienda. "Per raggiungere questo obiettivo dobbiamo intercettare anche i mercati a Sud dell'Equatore, puntando su Sudafrica e Australia; sono già stati avviati contatti con alcuni partner commerciali presenti in questi due Paesi e siamo fiduciosi che nei prossimi mesi potremo dare il via a nuove partnership". Tonitto è già presente in alcuni mercati del Far East come Singapore, Filippine e Taiwan dove i prodotti made in Italy hanno un posizionamento premium. Inoltre, la Pmi ha già siglato accordi con distributori che servono i mercati del Nord Europa, dei paesi Baltici e l'Olanda.

CANADIAN HORMONE-TREATED MEAT: PRESENTED A PARLIAMENTARY QUESTION ON IMPORTS TO THE EU

"Ceta allows meat containing illegal hormones to be imported into Europe." With this strong statement, MEP Eric Andrieu presented the European Commission with a parliamentary question asking to shed light on the import of Canadian meat containing illegal hormones into the European territory. "This hormone-treated meat, labelled hormone-free, is then exportable worldwide, including to Europe", Eric Andrieu points out. "This is not only a serious failure, but also a major transgression of the EU's red line on imports of Canadian products; it is also at odds with European legislation prohibiting the sale of such products on the European market." The MEP, urging for clarity, asks what measures the Commission intends to take. "While CETA, by its very nature, allows the import into Europe of hormone-treated meat labelled as hormone-free, and such imports are therefore il-



legal, does the Commission intend to suspend imports of Canadian meat? Does this situation call into question the implementation of the agreement, which is still provisional pending its validation by the national parliaments?"

Carne canadese con ormoni: presentata un'interrogazione parlamentare sulle importazioni nell'Ue

"Il Ceta consente l'importazione di carni con ormoni illegali in Europa". Con questa pesante dichiarazione, l'eurodeputato Eric Andrieu ha presentato alla Commissione europea un'interrogazione parlamentare chiedendo di fare luce sull'importazione di carne canadese nel territorio europeo contenente ormoni illegali. "Queste carni sono esportabili in tutto il mondo, quindi anche in Europa", sottolinea Eric Andrieu. "Non si tratta solo di una grave lacuna, ma soprattutto di una grave trasgressione della linea rossa stabilita dall'Unione sull'importazione dei prodotti canadesi; va anche contro le disposizioni di legge europee che vietano la vendita di questo tipo di prodotto sul mercato Ue". L'eurodeputato, sollecitando di fare chiarezza, chiede quali misure intende prendere la Commissione. "Sebbene il Ceta per sua stessa natura consenta l'importazione in Europa di carne contenente ormoni etichettata senza ormoni, e tali importazioni divengano quindi illegali, intende la Commissione sospendere le importazioni di carne canadese? È probabile che questa situazione rimetta in discussione l'attuazione ancora provvisoria, in questa fase, dell'accordo, in attesa della convalida da parte dei parlamenti nazionali?"

Caseificio Palazzo
LATTICINI DAL 1957

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



NEWS

HOVIS HOLDINGS RECEIVED TAKEOVER BID FROM ITALY'S NEWLAT FOOD

Newlat Food looks beyond the Channel Tunnel to expand the group, which owns famous brands like Polenghi, Buitoni, Delverde, Ala and Giglio among others. Angelo Mastrolia's company made a made a non-binding offer to shareholders of Hovis Holdings Ltd., a British brand with a long tradition in the bakery sector. The operation would allow Newlat to bring forward by 24 months the achievement of two important goals presented to investors at the IPO. That is to say, to achieve consolidated revenues of around one billion euros and become one of the largest operators in the food sector in Europe, with a significant market share in Italy, Germany and the United Kingdom. Newlat Food is now awaiting feedback from shareholders.

Newlat Food punta al Regno Unito: proposta un'offerta per l'acquisizione di Hovis Holdings

Newlat Food guarda Oltremarica per espandere il gruppo che, tra i vari marchi, comprende Polenghi, Buitoni, Delverde, Ala e Giglio. La società di Angelo Mastrolia avrebbe avanzato un'offerta non vincolante per l'acquisizione della totalità delle azioni di Hovis Holdings Limited, marchio britannico di lunga tradizione nel settore dei panificati. L'operazione consentirebbe a Newlat di anticipare di 24 mesi il raggiungimento di due importanti obiettivi presentati agli investitori in occasione dell'Ipo. Vale a dire, ottenere ricavi consolidati per circa un miliardo di euro e diventare uno dei maggiori operatori del settore alimentare in Europa, con una significativa quota di mercato in Italia, Germania e Regno Unito. Newlat Food sarebbe ora in attesa di un riscontro da parte degli azionisti di Hovis.



COCA-COLA HBC ITALIA: DAVIDE FRANZETTI IS THE NEW COMMERCIAL DIRECTOR

Coca-Cola Hbc Italia, the main producer and bottler of The Coca-Cola Company brand beverages in Italy, announced that Davide Franzetti has been appointed as new sales director. "I am very proud to be given the chance to contribute to the success of a sales force of over a thousand talented professionals: they are the real secret ingredient of Coca-Cola", said Davide Franzetti, that now will be at the head of one of the largest sales forces in the country and will manage relations with customers in the modern and Horeca channel, as well as being the reference point for the Route to Market, Commercial Capability, Sales Services and Cold Drink Equipment departments.

EU COMMISSION ACCUSED CONSERVE ITALIA OF BREAKING ANTI-TRUST RULES

The EU Commission has informed Conserve Italia and its subsidiary Conserve France SA of its preliminary view that they have breached EU antitrust rules by colluding to distort competition in the market for canned vegetables in the European Economic Area (EEA). The Commission has concerns that Conserve Italia may have colluded with other market participants within the EEA to fix selling prices, share markets and allocate customers for the supply of certain types of canned vegetables (under own brands or under private labels) to retailers and/or food service companies. If, after the parties have exercised their rights of defence, the Commission concludes that there is sufficient evidence of an infringement, it can adopt a decision prohibiting the conduct and imposing a fine of up to 10% of a company's annual worldwide turnover.

Conserve Italia nel mirino dell'Antitrust Ue per sospette pratiche anti-concorrenziali

La Commissione europea ha comunicato a Conserve Italia e alla controllata Conserve France SA che, secondo le conclusioni di un'indagine preliminare, le due aziende hanno violato le norme antitrust comunitarie "accordandosi collusivamente per falsare la concorrenza nel mercato delle conserve vegetali". La Commissione sospetta infatti che Conserve Italia si sia accordata con altre aziende operanti nello spazio economico europeo per fissare i prezzi di vendita, ripartirsi i mercati e suddividersi i clienti per la fornitura di alcune tipologie di conserve vegetali (con marchi propri o a Mdd) a retailer e/o catene di ristorazione. Dopo che le parti interessate avranno esercitato i loro diritti di difesa, se la Commissione riterrà di avere prove sufficienti di un'avvenuta infrazione, potrà imporre una multa che può arrivare fino al 10% del fatturato annuale realizzato dall'azienda in tutto il mondo.

Coca-Cola Hbc Italia: Davide Franzetti è il nuovo direttore commerciale

Coca-Cola Hbc Italia, principale produttore e imbottigliatore delle bevande a marchio The Coca-Cola Company in Italia, annuncia la nomina di Davide Franzetti come nuovo direttore commerciale. "Sono molto orgoglioso di poter contribuire al successo di una forza commerciale di oltre mille professionisti talentuosi: sono loro il vero ingrediente segreto di Coca-Cola", ha commentato Davide Franzetti, che sarà a capo di una delle forze commerciali più grandi del Paese e gestirà le relazioni con i clienti del canale moderno e Horeca, oltre ad essere il punto di riferimento delle strutture di Route to Market, Commercial Capability, Sales Services e Cold Drink Equipment.

BARILLA ACQUIRED PASTA ZARA'S MEGA-PLANT FOR 118 MILLION EURO

With a 118 million euro worth operation, Barilla acquired the Pasta Zara plant in Muggia (Trieste), one of the largest in the world in the pasta sector, that can boast a self-supporting warehouse with 65 thousand pallet spaces. The trade union agreement signed with the Emilian giant marks an important point for the Trieste industry and the positive conclusion of a story that began with the arrangement procedure in May 2018. 153 employees work in the plant, mainly in production functions, whose job preservation has been ensured by the trade unions since the first informal preliminary contacts with the new owner.

Barilla: definita l'acquisizione dello stabilimento Pasta Zara per 118 milioni di euro

Con un'operazione da 118 milioni di euro, Barilla acquisisce lo stabilimento di Pasta Zara a Muggia (Ts), uno fra i più grandi al mondo nel settore della pasta con un magazzino autoportante da 65 mila posti pallet. Tra gli asset dell'accordo, ci sono il passaggio dei 153 dipendenti attualmente in forza, il mantenimento del contratto collettivo nazionale di lavoro del settore alimentare e degli attuali inquadramenti e delle indennità in essere, oltre all'istituzione del premio per obiettivi, già dal 2021.



FERRERO: THE ACQUISITION OF BRITAIN'S FOX'S BISCUITS HAS BEEN FORMALIZED

Ferrero keeps on growing in the biscuit sector. The Alba-based company has indeed announced the acquisition from Northern Food Grocery Group Limited - a subsidiary of the 2 Sisters Food Group controlled by Boparan Holdings - of Fox's and Rocky brands. Through the acquisition, the subsidiary of Ferrero wants to further strengthen its presence in the British market by focusing on a sector, that of biscuits, which has been growing steadily, and whose consumption in England enjoyed a further boost during the coronavirus lockdown. As part of the transaction, the Ferrero-related Company will take over two production facilities in Kirkham and Batley that employ 1,500 workers. The business being sold generated sales of approximately 157 million pounds during the last 12 months.

Ferrero: ufficializzata l'acquisizione dei biscotti inglesi Fox's

Ferrero non si ferma e continua la fase di consolidamento nel comparto biscotti. La società di Alba ha infatti messo a segno, tramite una sua società affiliata, un altro colpo: l'acquisizione dei biscotti inglesi a marchio Fox's e Rocky, celebre marchio inglese dalla Northern Food Grocery Group Limited, società del Gruppo 2 Sisters Food Group controllato da Boparan Holdings. Attraverso l'acquisizione, la società affiliata a Ferrero vuole incrementare il proprio radicamento anche nel mercato britannico puntando su un settore, quello dei biscotti, da tempo in forte crescita, e i cui consumi in Inghilterra hanno goduto di un'ulteriore spinta durante il lockdown. Nell'accordo è prevista l'acquisizione degli stabilimenti di Kirkham e Batley dove lavorano 1500 dipendenti. L'attività oggetto della vendita ha generato un fatturato pari a circa 157 milioni di sterline negli ultimi 12 mesi.

VALDO INAUGURATES THE FIRST PROSECCO BAR IN THE CENTER OF MOSCOW

The brand's first flagship store opens in Moscow, in collaboration with the historic distributor Vinicom. Located in the very central and luxurious Tverskoy district, northwest of the Kremlin, Valdo Prosecco Bar offers customers the full range of labels from the Treviso winery. "First of all the Valdobbiadene Prosecco Superiore Docg Marca Oro", the company explained in a note. "The brand's best-selling product, the most beloved Prosecco Docg in Italy, is the fruit of a unique territory, that of Conegliano Valdobbiadene, named World Heritage Site last year and therefore under the protection of Unesco."

Valdo inaugura il primo Prosecco Bar nel centro di Mosca

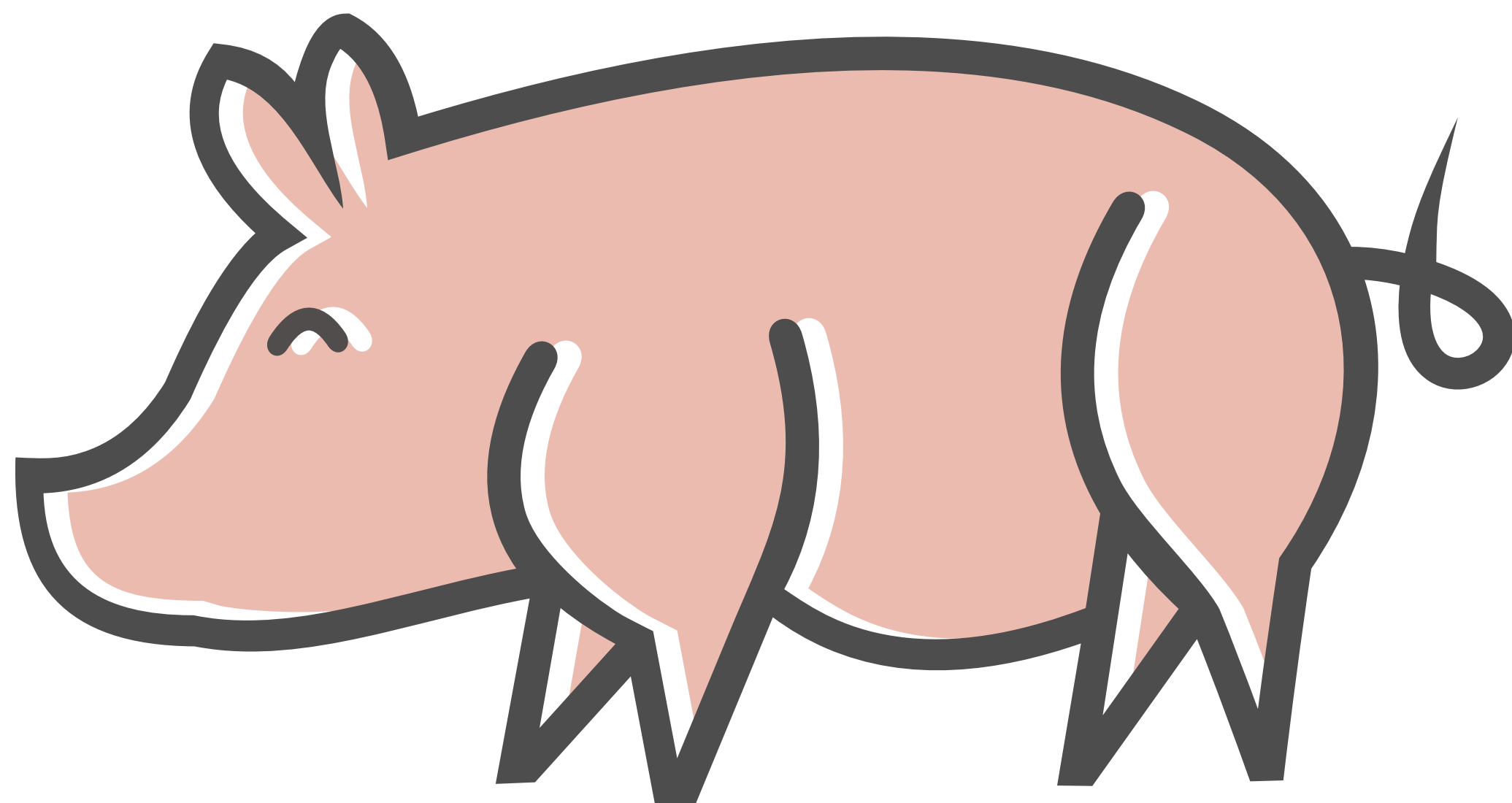
Apri a Mosca il primo flagship store del brand, in collaborazione con lo storico distributore Vinicom. Situato nella centralissima e lussuosa zona di Tverskoy, a nord-ovest del Cremlino, il Valdo Prosecco Bar offre alla clientela l'intera gamma di etichette della casa vinicola trevigiana. "Primo tra tutti il Valdobbiadene Prosecco Superiore Docg Marca Oro", spiega l'azienda in una nota. "Prodotto best-seller del brand, il prosecco Docg più venduto in Italia, ovunque il preferito, frutto enologico di un territorio unico, quello di Conegliano Valdobbiadene, nominato dallo scorso anno Patrimonio dell'Umanità e quindi sotto la tutela dell'Unesco".



The advertisement for Granoro Dedicato pasta features a large image of a pasta package and a bag of flour. The package is labeled "granoro Dedicato SOLO GRANO DI PUGLIA MACINATO INTERO SPAGHETTONI INTEGRALI 500g e". The bag is labeled "granoro Dedicato SOLO GRANO DI PUGLIA MACINATO INTERO CASARECCE INTEGRALI 500g e". The background shows a field of wheat with haystacks under a blue sky. Text overlays include: "IT PRESERVES THE WHEAT GERM NATURALLY PRESENT IN THE GRAIN", "SLOWLY MILLED", "BRONZE DRAWN", "NATURALLY RICH IN FIBRES", and "THE ONLY PASTA PRODUCED WITH 100% APULIAN WHEAT THANKS TO A SHORT PRODUCTION CHAIN". A bottom text block states: "Thanks to an accurate production process and the use of slow drying methods at low temperatures, Granoro produces a wholemeal pasta which keeps the typical flavour of wheat and a nutritionally complete profile." The Granoro logo and "Dedicato ALLA NOSTRA TERRA" are at the bottom.



MEAT INDUSTRY



Swine fever: taking stock of the epidemic

The sector is concerned about the contagion trend in Europe. Farms in Romania, Hungary and Poland are under observation. The situation in China is getting better. But can we trust the data from Beijing?

Before Covid-19 pandemic, the most feared virus was another one. There wasn't an operator in the industry who didn't talk about the infamous African swine fever (ASF), cross and delight of the industry: a godsend for farmers - head prices skyrocketed - and a disaster for processors. One against the other, as usual in the pig industry. With the distribution that for too long turned a blind eye on the increase in price lists.

Harmless to humans but devastating for pigs, the virus has mown down farms in China - where, according to the most reliable estimates, 20% of the 440 million pigs have died - and has shocked the global market, boosting the Asian giant's demand to the limit.

This was until the outbreak of Coronavirus. Which, from the end of February onwards, replaced ASF in the media. So it is interesting to analyse the last few months, when little or nothing was said about swine fever.

According to the elaborations of the platform Teseo by CiaI (Source: Oie, world organisation for animal health), the situation has worsened in Europe, and Romania is suffering an impressive escalation in the contagion. The Chinese scenario is less problematic, but official figures released by Beijing aren't always

that accurate. As a matter of fact, as documented in a Reuters survey, the Government should pay a fixed fee for each animal slaughtered in farms. But local officials thought it was a good idea to fake the figures, in order to save money and make the situation seem to be under control.

Peste suina: a che punto è il virus

Innocuo per l'uomo ma devastante per i maiali, il virus ha falciato gli allevamenti in Cina dove, secondo le stime più attendibili, sarebbe morto il 20% dei 440 milioni di suini. Un'epidemia che ha sconvolto il mercato mondiale e che, fino all'esplosione della crisi sanitaria da Coronavirus, era centrale anche per la stampa internazionale. Oggi, però, il settore guarda con preoccupazione all'andamento dei contagi in Europa. Stando alle elaborazioni della piattaforma Teseo by CiaI, nei primi cinque mesi dell'anno la Romania ha avuto ben 42mila casi di infezione, a fronte dei 3.500 dell'Ungheria, dei 1.200 della Polonia e del migliaio di casi registrati in Cina. Almeno stando alle informazioni diffuse dal Governo di Beijing.

According to the survey, based on interviews with dozens of breeders, butchers and retailers, the outbreaks reports have fallen on deaf ears in most cases. Without entering the official statistics. Often local authorities would have refused to carry out the tests even after the death of many pigs. And they would also have pushed the farmers towards a crazy action: send the pigs to slaughter although they presented the first signs of the disease. Exponentially increasing the risk of a species jump.

The first five months of the year speak for themselves: Romania has had 42,000 cases of infection, compared to 3,500 in Hungary, 1,200 in Poland and 1,000 in China.

The new hotspot is Europe, as already confirmed by an Efsa report in January. And the countries of the East are those most under observation, with the exception of Bulgaria, where there are still very few outbreaks. Looking at the contagion map, it is precisely this new European centrality that stands out.

All that remains to be done is to avoid a second wave, for this virus and the other one as well. As a joint return of both would have devastating effects on the entire supply chain.

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SUSTAINABILITY

Fresh food? Green packaging

Recyclable solutions for delis are demanded by over 75% of consumers, according to Neurexplorer 2020 data. In order to meet this need, the new Eco Packaging System by Esseoquattro is born.

Consumers' needs are changing fast, for food products and their packaging alike. The eco-friendly trend exploded in recent years has considerably affected the packaging sector, since consumers have become increasingly sensitive to the effects that food packaging - from production to disposal - has on the environment.

In order to meet the new needs of modern consumers, Esseoquattro, an Italian company that since 1977 has been projecting, producing and distributing food packaging solutions, has developed a new project dedicated to fresh and deli products. A system that reduces the environmental impact of packaging, while preserving the freshness of its content. It is called Eco Packaging System and is made of three items that are the result of the work carried out by the company's R&D.

The study

According to 2020 data issued by Neurexplorer, 71% of consumers believe that packaging could negatively affect the environment. And for this very reason 75% of them is now asking for recyclable solutions for the fresh food sold at the take-away counter. At the same time, 81% of consumers is looking for convenient packaging solutions, able to preserve the freshness of food. In addition, more than 60% of consumers claims to be ready to pay more for an environmentally-friendly packaging solution that guarantees product quality.

Three solutions

Eco Packaging System, as the name suggests, is an eco-friendly packaging solution. It is made of three items that can be combined according to the different needs: the Be Green Ideabril wrapping paper; the Be Green Ideabril bag; and the Be Green Oléane bag.

The first two solutions, heat-sealable to ensure maximum hygiene and food safety during transportation, are mainly dedicated to the packaging of deli meats and cheeses. For ready meals, instead, the Be Green Oléane



Al banco taglio l'incarto si fa green

I dati Neurexplorer 2020 mostrano che il 75% dei consumatori chiede confezioni riciclabili per gli alimenti freschi serviti. Nasce così Eco Packaging System, la soluzione ecosostenibile e salvafreschezza di Esseoquattro. Azienda italiana che dal 1977 progetta, produce e distribuisce packaging per alimenti.

anti-grease bag has been created: made with untreated natural brown paper, it prevents the migration of oil from fried products and keeps them crunchy. The anti-grease bag is also suitable for wrapping bakery products, sweets and sandwiches.

1 system, 4 advantages

There are four advantages arising from the adoption of the Esseoquattro solution. First of all, Be Green Ideabril's patented freshness-saving formula allows to preserve for a longer time the organoleptic properties of fresh food. In this way, domestic waste can be reduced, while allowing consumers to diminish their frequency of purchase.

At the end of their use, the three solutions, certified by Pefc, are all recyclable in the paper stream. In particular, the basic components of Ideabril's packaging - paper and film - can be separated for separate collection. In addition, the Be Green Ideabril and Be Green Oléane bags can be reused before disposal. Hence, they remain clean once the food contained is finished. Oléane is suitable for heating in the oven, in the microwave and on a plate; while Ideabril can be used for storing products in the refrigerator and freezer in the medium and long term. The Eco Packaging System can also replace plastic, polystyrene and paper trays (with the only exception of liquids) thus reducing the space occupied, with a consequent reduction of waste to be disposed and of freight vehicles in circulation.

The project, however, is constantly evolving. So much so that other product lines will be soon enriched with more and more eco-friendly solutions. "Innovation is part of our DNA", explains Silvia Ortolani, Esseoquattro's sales director. "Meet the need of consumers, anticipate them if possible, create solutions that make their everyday life simpler, thus improving the quality of life, has always been our mission. Eco Packaging System is much more than just a packaging system, it is our commitment to consumers".

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we offer you the opportunity to extend your business horizons, whether you are a small artisan or a big company. Discover the extraordinary potentials of HPP by booking our free tests on **hppitalia.it**.



THE COMPANY



Naturally good



From left: Mario and Egidio Fiandino

The use of vegetal - instead of animal - rennet as an ethical choice. The selection of only Piedmont milk for the production of innovative cheeses and high-end butter. Fattorie Fiandino presents its unique and nature-inspired product range.

The ability to carry on a Century-old family tradition and to enhance and protect the Italian gastronomic heritage are qualities recognized to Fattorie Fiandino and appreciated by both national and international market players. Just like the company's very short supply chain, from milking to cheese production.

Every day, around 60,000 liters of milk are delivered by local selected farmers to the Fiandino farm in Villafalletto, in the Piedmont region. An area sheltered on two sides by the Alps and to the east by the hills of the Langhe territory. Here, the altitude of more than 400 metres above sea level, the very low constant humidity and the cool temperatures make optimum conditions for the production of superior quality milk and the perfect ageing of cheeses.

Naturalmente buoni

Forte di una storia lunga un secolo e incentrata sulla valorizzazione della natura e del territorio piemontese, Fattorie Fiandino punta a conquistare i consumatori di tutto il mondo con una selezione di prodotti unici e originali. Dai formaggi a lunga e media stagionatura fino ad arrivare alle tome e al pregiatissimo Burro 1889. Prodotti che sono il risultato di una filiera corta (anzi cortissima), del massimo rispetto del benessere animale e dell'uso esclusivo di caglio vegetale grazie al brevettato 'Metodo Kinara'.

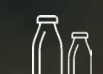
Key values



FEEDING
The feeding is chosen depending on the animal breed



BREED
Cows are born and raised in the company farm



MILK
100% milk from Piedmont, with strict analysis policy



WELLNESS
Fiandino produces genuine and conservative-free cheeses

"Our family-run company, strong of a 100-year-long history, has an eye firmly open to the future", claim the company owners, Egidio and Mario Fiandino, firmly decided to become market leader in the vegetal rennet cheese production: "We are exclusive holder of the registered trade mark Metodo Kinara (Kinara Method) for the production of both medium- and long-aged cow cheese with the use of authentic vegetal rennet from *Cynara cardunculus* only", they explain. "And the consumption of our Gran Kinara, a cheese aged for 12 months and naturally lactose and conservative free, is constantly increasing worldwide." Beside Gran Kinara, Fattorie Fiandino produces a wide and varied product range of semi-aged cheeses, long-aged cheeses and a premium butter chosen by famous pastry chefs and ice cream makers: 1889 Butter.

A nature-driven business

Back in the 16th century Stefano Fiandino, ancestor of the actual owners Mario and Egidio, moved from Milan to the Occitan Alps and established the family's first herd of Bruna Italiana cows. In 1920 Magno Fiandino decided to refurbish the milk business, expand it and give it a home in the place known today as Fattorie Fiandino in Villafalletto. The farm is home to more than 300 Bruna Italiana cows, raised according to the animal welfare principles, in cutting-edge facilities. "Our cows wear an electronic

collar that is constantly monitoring vital parameters for the animal's wealth," the two owners explain. "The farm has a cooling system that avoids heat strokes, we play relaxing music in order to help animal relaxation, and all the animals are born and raised in our farm in order to preserve harmony and herd balance. They are free to decide whether to stay inside or outside, and their feeding is selected with specific ingredients directly here in our farms."

Original tastes for health-conscious palates

Exports currently account for around 10% of the company's turnover, but this share is expected to increase soon, since business relationships with foreign countries are growing fast, both across and outside Europe: namely Germany, France, UK, Canada, North America and South-East Asia. "Our best-selling product, outside national borders, is definitely 'Gran Kinara', that combines the taste of great aged Italian cheeses with the unique characteristics and properties of real vegetal rennet. A product that meets the requests of modern, health-conscious consumers. "In addition to that, and in order to meet the different tastes of consumers, we produce special cheeses that enhance the tastes and flavors of our beautiful territory", they continue. "The two most recent product launches are 'Brilla', made with Barolo and Barbaresco grapes, and 'Trifulò', made with truffle."

The Kinara Method



Fattorie Fiandino invented the Kinara Method, that consists in a special recipe for vegetal rennet cheeses using *Cynara cardunculus* flowers. It's a precious and refined alternative that plays a key role in lactose elimination and in the development of original and peculiar tastes, in which the scents of artichoke and summer flowers are blended and balanced with milk from Bruna Italiana cows.

1889 Butter



1889 Butter takes his name from the year of birth of 'Grandpa Magno', while its great taste comes from the delicacy of the 100% Piedmont milk it is made of. The creams of fresh milk are centrifugated and then rest for over 72 hours before being transformed in a superb butter with fresh scents of milk and almond. It's available in the classic and salted version, as well as in the fresh version, hand packed within 4 hours from production.



THE INTERVIEW

That's America

Olli Salumeria is a California-based deli meat producer with Italian DNA and a specialization in pre-sliced salami and snacks. The emerging trends in the US market in an interview with the chief commercial officer, Marco Terenghi.

He has been working in the United States since 2005, and boast a strong specialization in the deli meat sector thanks to the meeting with Oliviero Colmignoli, nephew of Ferruccio Fiorucci. This is the professional background of Marco Terenghi, sales manager at Olli Salumeria, in Oceanside, California. "Oliviero was appointed head of production at Fiorucci's US branch," he explains. "When the group was acquired by Campofrio, in 2011, he decided to start his own company. He was looking for a short, immediate and easy-to-remember name: Olli. When I arrived the company was moving its first steps. And now we are ready to celebrate our 10th anniversary."

What's your company revenue?

Around 50 million dollars. The goal is to reach 100 millions in the next five years. All is good so far: in the 'worst year' we posted a 5% increase. Growing was quite easy in the beginning. Now that we have consolidated our market position, we aim at competing with big and famous brands. In the United States, there is room for everyone: there are around 300 million people and just a dozen of companies.

It's just the opposite in Italy, where there is around 1,400 deli meat manufacturers and the market leader has a 6-7% share...
Exactly.

Which are the most important players in the US market?

Some of the most renowned are Smithfield and Columbus, as well as Daniele Inc., based in Rhode-Island. It was founded by Vlado Dukcevic, native to Trieste and belonging to the namesake family that owned the Kipre deli meat factory. Other market players are Fiorucci, Beretta Usa and Busseto, Veroni, Volpi [no connection with the Brescia-based group, ed], and Creminelli, which is similar to our company in size. In the last 10-12 years, several medium companies have been established, taking advantage of the growing demand for healthy and natural foods, with a reduced fat content and a less acidic taste.

Which are your core products?

Our product offer includes pre-sliced salami and snacks, where cured meats are paired with other

foods. Snack are also the most performing product category in our range. With the pandemic, of course, sales have decreased. But we are confident about the future. In general, innovation has always been a strategic part of our business.

Which are your distribution channels?

About three-quarter of revenue comes from large scale retail, both national (namely Whole Foods) and regional. Some products are sold to high-end food service, while others are distributed to a series of independent chains. Another part of our business is made with club stores.

How do they work?

These stores are similar to the Metro chain in Europe. Yet, to be allowed to do your shopping there you don't need to enter a VAT registration number, just pay a subscription fee of around 60 dollars, which is the entry level. At year-end, customers are given back a share of what spent during the year. Another dynamic sales channel, at least before the pandemic, were flying companies, that asked for small and refrigerated foods. But there is another big goal in our sight.

That is to say?

C-stores, convenient stores that are mainly located near gas stations. These stores are increasing the quality of their offer and Olli has created a brand tailored for this channel.

Is the deli counter in retail chains a performing sales channel?

It depends on the chain. The most requested specialties at deli counters are turkey and chicken, besides cooked hams. Sometimes, but not that often, salamis and cured ham are sold too. At Whole Foods, for instance, there are high-quality products available at the deli counter. In large supermarket chains - like Walmart or Kroger - it is harder for us to enter, because there is no room for our premium products. These stores have a very different target of customers. In addition, some brands have dedicated in-store corners.

Are the antibiotic-free and animal-welfare widespread trends in the US?

They were strong trends until a few years ago. But recently these trends, at least in the deli meat



sector, have been replaced by 'good and traditional'. Olli entirely relies on meat from pigs raised without antibiotics. More in general, I don't think that animal welfare is a trend likely to continue in the future: costs are high and not all companies are willing to pay them. I think that US customers will keep on asking for 'normal' meat, while antibiotic-free and animal-welfare will remain market niches.

As regards packaging: a fierce debate on plastics is taking place in Europe. What is going on in your country?

Honestly, I don't see such a fierce debate here. Some retailers, sometimes, ask for more information about the packaging we use, but to produce cured meats in modified atmosphere packaging (MAP) we need a multilayer film. We are very sensitive to any kind of innovation in terms of materials, but I don't see many possible alternatives right now.

There is no Italian flag on your products, but you often talk about Sopressata, Calabrese, Genoa, Napoli... what do you think about the 'Italian sounding'?

For our company image, we never considered the classic stereotype of the Italian-American guy with mustache and mandolin... we consider it an old-style marketing strategy, without appeal.

What did you choose?

We decided to convey another message, more modern and elegant. We know salami for how we learned to produce it in Italy, so we are an Ameri-

can company with an Italian know-how. In detail, for what concerns the names, we chose names that already existed in the US market - like Calabrese, Genoa, Sopressata - but that are different from the names of the Italian products: Genoa salami means nothing in Italy, while in the US it has a very specific meaning. Let me say that we only use generic words, and not words that recall of Origin appellations.

Trade shows are another key topic: which ones do you usually attend?

The Fancy Food, both in the winter and summer edition, and the International dairy deli bakery association (Iddba). Last year we took part for the first time in Nacs (National association of convenience stores), which is particularly useful for our snacks and pre-sliced salami sold in c-stores.

More in general, how will American trade shows be organized in the months ahead?

I think that trade shows will be missing for a while. We haven't been thinking about it yet: in 2021, there will be just a few events and honestly I don't see big improvements in the evolution of the pandemic. Our own agents are still working from remote, and dealing with buyers and customers through e-mails and telephone calls.

One last question: what kind of connection do you have with Italy?

We know a lot of Italian companies and have great respect for all of them. Just like we do for our US competitors.

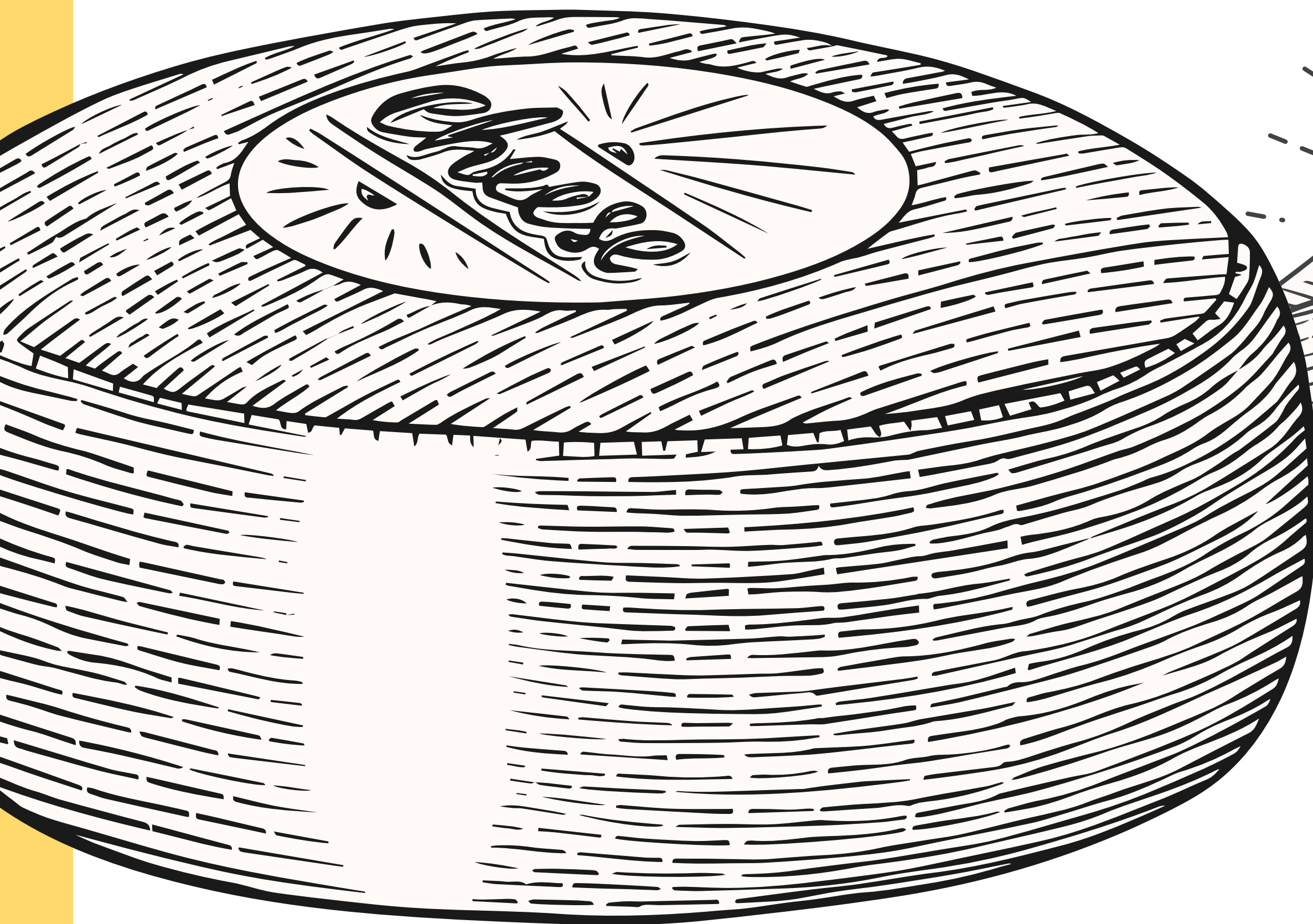


Te la do io l'America

Olli salumeria è una realtà californiana con dna italiano. Specializzata in prodotti a libero servizio e snack. I trend emergenti e la situazione di mercato negli Stati Uniti. La parola a Marco Terenghi, chief commercial officer.



MARKETS & DATA



DAIRY: A SIX MONTHS OUTLOOK

Overall consumption is decreasing, while production is surging. Imports are shrinking too. And China seems to be out of negotiations. The latest data by Robobank analysts.



WHAT'S GOING ON AROUND THE WORLD

US: government aid underway

In the United States a significant increase in the volumes stored was recorded, especially of cheeses and butter. In the last months, an increase in the stock of skimmed milk was recorded too. Indeed, in April milk production in the United States grew 3% year on year. Nevertheless 1% of this surplus was thrown away. In the months ahead, the US government said it will purchase local dairy products: an unprecedented intervention to support the industry, that will be actuated through the direct purchase of products or by providing companies with income support. The US government could, according to forecasts, buy around 2 billion liters of milk a couple of months: a huge amount, and a real rollercoaster for the market.

Europe: funds released for private storage

Farmers in Australia and New Zealand, when the global market is in trouble or crisis, expect interventions in the EU market, according to Robobank experts. An intervention was thus expected from Europe, in particular on the stocks of skimmed milk powder, but it did not take place. However, funds were slowly released for private storage, so volumes on the market, especially for butter and cheese, were reduced.

China: the big 'missing'

In the second half of 2020, a decrease in volumes imported from China is expected but compared to initial forecasts, the decrease will be more contained. In the coming months, Chinese buyers will be the 'big missing' from the sector's world trade. With an average 3% decline in consumption on an annual basis, China is not expected to be in search for commodities until the second half of the year.

Lattiero caseario: il semestre che verrà

Il punto sul mercato mondiale secondo gli analisti di Robobank. Consumi in calo e produzione in aumento. Ma anche importazioni ridotte. Con la Cina assente dalle contrattazioni.

Several markets are still struggling due to the slowdown in demand determined by the closures imposed on the past weeks and months by Governments around the world. Sales, after the boom recorded by the modern retail channel and the total closure of the Horeca channel, seem to be getting back to normal levels. It will take time and current limitations - especially in food service - will prevent a complete recovery, to pre-Covid levels, in the second half of the year. This is what emerges from a report by Rabobank Research, Dutch provider of financial services and market research, related to the second quarter of 2020.

When financial market aids provided by governments will stop, the first real effects of the pandemic on global economy will emerge. Furthermore, in the months ahead the prices of dairy products will come under pressure due to the high volumes stored and the fierce competition linked to the decline in demand for imported products. But it doesn't end up here: China, the world's largest importer of dairy products, will be 'missing' from the market. In fact, in 2020 imports are expected to decline by 15% on an annual basis. In the rest of the world, however, the weakness of currencies will be a major challenge for imports.

Consumption is going down...

The first quarter of 2020 recorded a positive trend thanks to the surge in retail sales in numerous countries. From April onwards, consumer purchasing behaviors started to normalize, and a weaker - or rather negative - demand is expected in the coming months. So much so that consumption is expected to resume only starting from 2021. Food service, which plays a key role in the decline in demand for dairy products, has suffered unprecedented losses: -50% year-on-year in Australia, -39% in the United States and -30% in China. According to experts, a recovery won't take place until year-end.

... while production is going up

Production in key world areas for the dairy market has increased in recent months. This is a small growth in the historical context: figure show that, against an average of +1.5%, production in the first quarter of 2020 increased by +1.1%. In the second quarter, it fell below +1%, also due to adverse climatic conditions. According to forecasts, it should remain at this level until the first half of 2021.

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ZOOM

Plastic is back



Pilloried by governments and associations, during the Covid-19 emergency the material has proven to be hardly replaceable. A glimpse into the Italian and European scenario.

Plastic yes, plastic no. Before the outbreak of the pandemic, the debate about its strengths and limitations was high in the agenda of governments around the world. In Italy, a plastic tax was ready to come into force on the past July: a 45 cents levy for each kilo of plastic produced for the creation of disposable items. A tax that, in the midst of the sanitary emergency, the government has postponed to January 2021. The same did not happen with the EU single-use plastics directive. In an open letter sent to the EU Commission, the European Plastics Converters (EuPC) association explained that "unfortunately, the coronavirus has shown us that not all materials are the same. Single-use plastics are not easily substitutable, in particular in keeping the same hygienic properties to safeguard consumers". An argument that, however, did not convince the Commission, which confirmed the ban starting from the 1st January 2021. The testimonies of some industry players, released during the 'Food & made in Italy summit' organized by Il Sole 24 Ore on the past July.

Recovery and recycling rates: Italy ranks high among EU countries

"Today we see that disposable face masks start to appear on sidewalks and beaches, abandoned. This shows that plastic does not get lost in the environment on its own, but because of people's bad habits," explained Stefano Lazzari, director of Pro Food Italia (the association that brings to-

gether producers of plastic containers for food & beverage and tableware) and Ceo of Sirap Group, important producer of foam and rigid containers for fresh food. Plastic production in our country is a strategic sector for the economy, Lazzari highlights: "On a European scale, Italy is second only to Germany and can boast high recovery and recycling rates."

Out of 13 million tons of packaging materials released for consumption in 2018, about 80% - equal to 10 million tons - were recovered, as displayed by Conai data. "Plastic has an 88% recovery rate, just like paper and aluminum", added Nicola Ballini, director of Pro Food Italia and general manager of Ilip, manufacturer of plastic and bio-plastic packaging for the food sector. Considering that in 2018 the plastic recycling rate in Italy stood at 45%, the 50% recycling target set by the European Union by 2025 seems to be within reach.

Plastic: an ally of food producers during the Covid-19 emergency

In full lockdown, national plastic manufacturers recorded an increase in production up to 40% in order to meet the urgent requests of the supply chain. "Amid the Covid-19 emergency, hospitals and canteens required safe disposable products, with proven functionality, at a sustainable price and already included in a reliable recycling stream. Many requests that translate in a single word: plastic," said Marco Omboni, director of

Pro Food Italia and sales director at Isap Packaging, manufacturer of disposable tableware.

Alternative materials: a real alternative?

The comparison between plastics and the 'new materials' is inevitable, starting from bio-plastics, highly requested before the pandemic but less and less sought after when the sanitary (and economic) crisis exploded. "Replacing all plastic packaging with alternative materials would be impossible due to functional and supply chain limits," Omboni explained. "Bio-plastics are interesting materials and in some sectors they also well applied, but the volumes produced today are definitely too low compared to the amount of plastic consumed today."



Il ritorno della plastica

Messo alla gogna da governi e associazioni, con l'emergenza Covid-19 il materiale ha dato prova di essere difficilmente sostituibile. E nei mesi del lockdown, le aziende italiane del comparto hanno fatto registrare un importante incremento della produzione, che in alcuni casi ha raggiunto anche il 40%. La testimonianza di alcuni player del settore.

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filled with milk cream



Bite size cookie flaky pastry
filled with chocolate cream



Flaky pastry snacks rolls
filled with velvety hazelnut cream



Flaky pastry snacks rolls
filled with vanilla cream



ZOOM

GH Holding: full speed ahead!

Prosciuttificio San Michele (Terre Ducali), Parma Is and HPP Italia achieved a 17.9% growth in the first 6 months of 2020. And now get ready to face new challenges.



Giulio Gherri



Despite the difficulties imposed by the pandemic, GH Holding doesn't stop and looks ahead. Hence, the negative events and the uncertainty of the global economic context have not affected the growth of a strong and innovative group, which boasts five production plants and includes three 'champion' companies: Prosciuttificio San Michele (Terre Ducali), Parma Is and HPP Italia. Each one specialized in a different sector: deli meats; sandwiches and ready-to-eat goods; high pressure technologies. Strategic sectors for the Italian food industry, and with high growth potential, especially on global markets.

Growing despite the crisis

"Our industrial Group has not only closed the first half year and managed the extraordinary situation arising from the Covid-19 Pandemic in a positive way", said the CEO, Giulio Gherri. "It further strengthened its business by recording astonishing performances." The half-year report, indeed, shows revenues of 20,975,969 euro, rising 17.9% over the same period in 2019. "If we consider that the first half of 2019 accounted for a yearly revenue share of 42%," he adds, "2020 estimate is projected to 50 million euro compared to the 43 million of last year".

The reasons behind growth

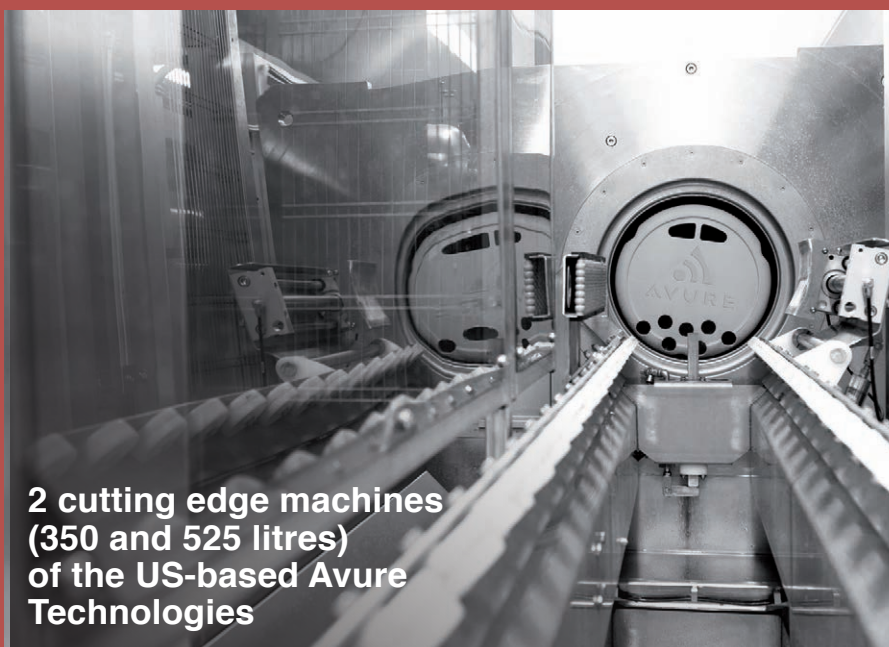
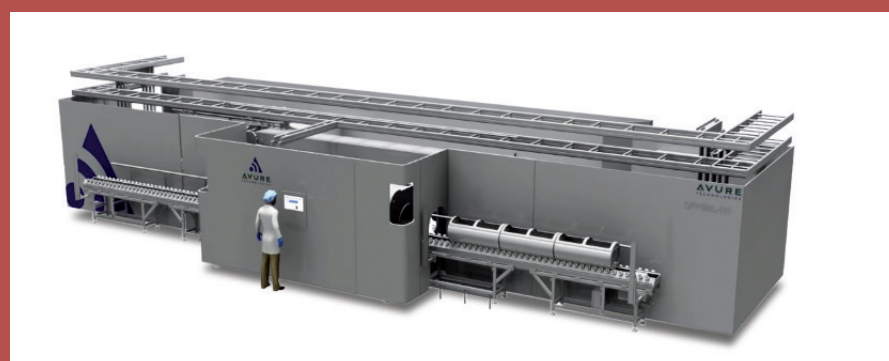
The three companies - Prosciuttificio San Michele, Parma Is, HPP Italia - are all growing. "For different and complementary reasons they have benefited from the strong growth registered by the deli meat sector (Prosciuttificio San Michele), from the increasingly strong attention paid by consumers to healthy, fresh, and quality products with high value added (Parma Is) and the constant search for greater food safety combined with a longer shelf life, yet preserving the quality level of the product (HPP Italia)", continues the CEO.

GH Holding: avanti tutta

Nonostante le difficoltà legate alla pandemia, GH Holding non si ferma e guarda avanti. Il gruppo, che vanta cinque stabilimenti produttivi e comprende il prosciuttificio San Michele (Terre Ducali), il produttore di panini e prodotti ready-to-eat Parma Is e lo specialista dell'alta pressione HPP Italia, cresce del 17,9% nei primi sei mesi del 2020. E si prepara a nuove sfide.

HPP ITALIA

It started the second machine (the largest in the world) for high pressure processing in the HPP Italia's Traversetolo plant (Parma province). An investment that turned the plant in the largest European third-party High Pressure Processing center for food products



2 cutting edge machines (350 and 525 litres) of the US-based Avure Technologies

The production facilities

Prosciuttificio San Michele-Terre Ducali

15,000 mq

production facilities

11

slicing lines

Parma Is

100,000

sandwiches daily produced



SUPPLY CHAIN



Gli effetti del Coronavirus sul mercato F&B

Nel contesto internazionale della pandemia da Covid-19, l'agroalimentare sembra essere, almeno finora, tra i settori meno colpiti. In particolare per alcune tipologie di prodotto - vedi la pasta o il vino - che, nella prima parte del 2020, fanno registrare incrementi significativi sul fronte delle esportazioni. Il ruolo del commercio internazionale e la sua evoluzione, sottolinea la Fao, saranno centrali nei prossimi mesi per scongiurare che la crisi sanitaria si trasformi anche in emergenza alimentare. Importante, in questo senso, saper intercettare i nuovi bisogni dei consumatori che con crescente attenzione scelgono alimenti clean label, di origine certificata, sostenibili e coerenti con i principi del benessere animale.

The Coronavirus' effects on f&b

The most affected categories. The importance of export for the recovery. The new consumption trends. The Tuttofood observatory depicts the sector.

In the international context of Covid-19 pandemic, agri-food seems to be among the least affected sectors so far. According to the data from Istat (Italian national institute of statistics), Italian exports showed good resistance to the crisis in the first quarter of 2020. In particular, pasta, after a record 2.6 billion euros coming from exports in 2019, obtained a 21% increase in sales volumes abroad in March, that translates into 97 thousand tons more, of which 72 are related to EU markets. The wine sector exceeded expectations too, gaining +5.1% in non-EU markets in the first four months of 2020.

In its Food Outlook Report of June, however, Fao highlighted the need to work in order to avoid that the health emergency spreads also to food supply. From this point of view, underlines the organisation, the role of global trade, expected to grow by 2.2% between 2020 and 2021, will be fundamental. The Food industry monitor also confirms the importance of international trade for the recovery of the sector, calculating its growth at around 11% in the two-year period 2020-2021.

Among the 'virtuous' sectors of the study there are distillates, flours, food equipment, sweets, water, coffee and milk. While cold cuts, wine, beer and packaging will present results in line with the market average. To relaunch the sector, it is also necessary to consider the new trends that consumers follow while choosing a product.

The research 'What matters to consumers when buying food?', conducted on a global scale by the Dnv GI certification institute, shows how the Covid emergency has highlighted the importance of food safety (55% of respondents), as well as health (53%), but also environmental (38%) and social aspects (35%). In particular, consumers appreciate a clear label (65%) and pay attention to the origin of the product and ingredients (64%). But also to sustainability (68%), food waste (61%) and animal welfare (53%).

The Consumer Spending Tracking of the Iri research institute analysed the spending in large-scale retail trade in the main markets. In the May edition, it reported high growth rates for food in New Zealand (+21.2%) and the United States (+20.3%), as well as the Netherlands (+12.5%), Spain (+12.2%) and the United Kingdom (+10.4%). Followed by Germany (+8.9%), Italy (+6.4%) and, lastly, France (-0.7%). Among the trends, private label continued to grow, accounting for 19.7% of the Italian market and recording peaks in France and the Netherlands.

As for Italy, diversifying the trade channels will represent a priority. Starting from e-commerce, which registered a growth in Food & Grocery that the eCommerce B2C Observatory of the Politecnico di Milano and Netcomm estimates at +55% (almost one billion euros).

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Mario and Egidio Fiandino



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THE SURVEY



Packaging in supermarkets: sustainable revolution

A good communication is a strong competitive advantage for both manufacturers and retailers. That find in product packs their first and foremost 'business card'. The key highlights from the Nomisma-SpinLife survey.

Held on the past September the presentation of the Observatory on Fast Moving Consumer Goods Packaging Market by Nomisma and Spin Life. With the participation of Silvia Zucconi for Nomisma, Alessandro Manzardo for Spin Life, and the Nielsen analyst Nicola De Carne. The debate was enriched by the contributions of some big players in the food & beverage industry – namely Fileni and Acqua & Terme Fuggi – together with the packaging multinational Tetra Pak and three large scale retail companies that, for many years now, have been carrying on strategic sustainability plans: Esselunga, Coop and Conad.

"The legislative framework is encouraging both manufacturers and consumers to search for new and alternative packaging solutions," Alessandro Manzardo explains. "One of the most sought after alternative is the substitution of plastic with compostable or renewable materials. Despite this is not always a viable solution. Hence, it could not solve the problem, but shift it to another stage of the life cycle, determining a different kind of environmental pollution. In this regard, a complete Life Cycle Assessment (LCA) is fundamental, just like the role of consumers, that are the last link of this chain."

Territoriality and sustainability: the big purchasing drivers

The changes that the Covid-19 pandemic has impressed on people lifestyle, on the organization of work, and on purchasing habits has had groundbreaking effects on the activities of many companies and retailers. Some strategic growth assets – detected even before the outbreak of the pandemic – were given a further boost. This is the case of sustainability, a matter of primary importance in

Italian and European policies, and a founding value of the EU Green Deal.

"The search for sustainability also comes from the 'base' – Silvia Zucconi of Nomisma explains – since consumers are willing to find sustainable characteristics in the products they buy and in the actions undertaken by manufacturing companies alike, with the inclusion of local farmers and the set-up of 100% local or national supply chains."

The impact of these new purchasing habits is soon explained: according to Nomisma, 75% of shoppers chose a supermarket on the basis of its level of sustainability, which includes its Private label offer. First and foremost 'business card' of every retailer. This led to concrete actions, like light-weighting packaging or packaging made from recycled materials or renewable sources. 'Reduce' and 'replace' seem to be, in this case, the key words of change.

The health crisis is accelerating digitalization

If territoriality and sustainability are the big purchasing drivers, digitalization is another fast developing business. "In the last months the boost to digitalization has concerned both the organization of new working patterns and purchasing habits, with the e-commerce that, in 2020, will reach the record-breaking value of 23 billion euro in Italy, rising 26 percentage points," Zucconi highlights. In the food & grocery sector alone, e-commerce is expected to be worth 2.5 billion euro by year-end, up 56% over 2019.

People love it when it's packed

The number of packed items sold in the Italian

large scale retail has increased to almost 45 billion pieces, up by 3.3% over the previous 12 months. For an additional purchase on 1.5 billion packed goods – 1.3 billion more were bought in the first 8 months of the year (1 billion between 17 February and 3 May 2020). "Packaging for fresh food is increasingly demanded, also because of sanitary reasons. It makes the grocery shopping faster and allows for a longer product storage." By the end of 2019, one product out of five sold in the Italian modern retail had some sustainable features in it, for a total turnover increasing by 2.6 percentage points.

"That of products from sustainable farming and agriculture was the most performing product category," Nicola De Carne explains. "In detail, antibiotic-free products experienced a double-digit growth (+62% over 2018), followed by products from a traced supply chain (+14.7%), those certified Ecocert (+19.6%) and those made with 100% natural ingredients (+9.7%). With regard to packaging, the use of compostable solutions increased by 55.9% last year, followed by packs with a lower plastic content (+21%) and low-carbon pack (+12.9%).

'Flexible' is better

"In 2019, almost 16,850 tons of packs were produced in Italy," explains Barbara lascone, of the Italian Packaging Institute. "The weight of every single pack has reduced significantly in the last years, and therefore it is not surprising that the most requested packaging solution is that of the 'super-light' flexible packaging for converters. Paper-based packaging and corrugated card board is also growing fast, mainly enhanced by e-commerce."

Packaging e Gdo: rivoluzione 'sostenibile'

Le trasformazioni impresse dal Covid allo stile di vita e alle modalità d'acquisto hanno avuto effetti dirompenti sull'attività di molte aziende e insegne della Gdo. Alcuni asset di crescita strategici, che erano già emersi prima della pandemia, hanno subito un'ulteriore accelerazione. È il caso della sostenibilità, un valore centrale nelle politiche di crescita del Paese e trainante anche su scala comunitaria, in quanto principio fondante del Green Deal europeo. Così come della digitalizzazione, complice la spinta del fenomeno e-commerce. La capacità di comunicare questi valori rappresenta sempre più un vantaggio competitivo strategico per produttori e retailer. Che trovano nel packaging il primo, e più importante, biglietto da visita. Gli highlights della tavola rotonda organizzata da Nomisma e Spin Life lo scorso 28 settembre.

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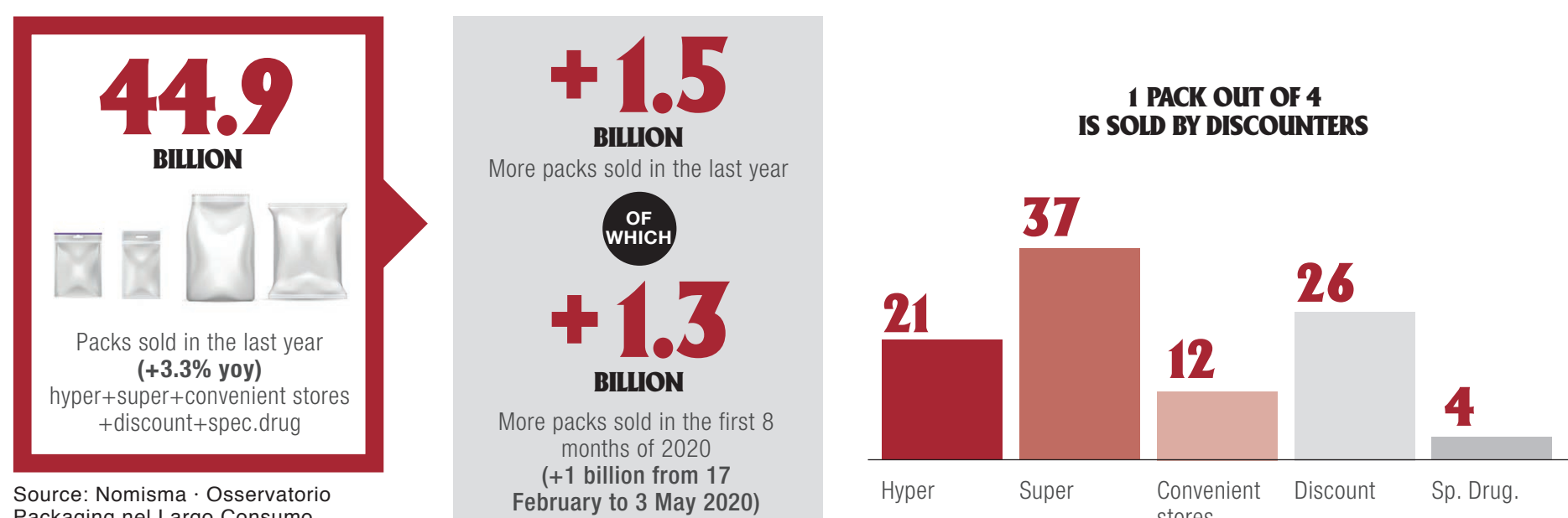
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f i



PACKAGING USE ON A RISING TREND IN ITALY



Source: Nomisma - Osservatorio Packaging nel Largo Consumo

ACQUA & TERME FIUGGI

Mirco Gabbin, general manager

"Our company was among the first to put mineral water in bottles, in the early '80s. It was also one of the first to remove it from plastic and put it back in the glass. Now, we are the first to put water in brik, in a practical package made for 75% of cellulose. The cap, instead, is made with a bio polymer. Launched just before the great lockdown as an on-the-go solution, to evaluate the project we will have to wait for the full resumption of mobility."



CONAD

Cinzia Lingerri, head of packaging

"With our private label range – around 4,200 products – we are aimed at having a coordinated and clear communication that helps consumers make informed choices. Soon, we will present a range of 6 ice creams packed in paper boxes, that next year will be enlarged with other 6 tastes. The goal is to move from plastic to paper 60% of our private label ice cream range. The hardest part of the transition to sustainability is industrializing such innovations. This is why the collaboration between the packaging providers and the industry is fundamental."

COOP

Luciano Villani, head of packaging

"The debate on environmental sustainability, for Coop, began in the 1970s. We have been among the first to abandon palm oil and to have antibiotic-free farms. With regard to packaging, we have been using recycled plastic for water bottles for about a year and for many years packaging light-weighting has been at the top of our priorities. Education also plays a key role: if the efforts made are not communicated, they are useless."

TETRA PAK ITALIA

Francesco Faella, chairman

"Tetra Pak sells around 4 billion packages in Italy, 190 billion packages around the world. During the Covid-19 crisis, sales increased compared to last year, against a decline in plant engineering. In our strategies we are replacing fossil-based plastics with plant-based plastics. And our ambition - by 2030 or sooner - is to offer the most sustainable packaging solution ever. We aim to decarbonise packaging, to eliminate its environmental impact in terms of Co2".

FILENI

Simone Santini, chief commercial officer

"The latest packaging innovation introduced by Fileni is a tray completely made of Mater-bi, and therefore compostable, to be recycled in the organic waste. A product very appreciated by retailers and whose values are communicated to consumers in a clear and simple way. Sustainability, for the Fileni Group, is a cultural path that starts from the inside. It is a social commitment, not just a product to place on the market."



ESSELUNGA

Antonio Vaccari, Hse manager

"Esselunga is both a distributor and a food company, with an integrated supply chain. We can therefore have maximum control over products and their quality. In recent years we have revolutionized the packaging in the fruit and vegetable aisle by replacing plastic with paper and nets. Where possible, we have also introduced r-pet up to the legal threshold and saved over 1 million tons of plastic a year. But products are not all the same: for meat and fish, for instance, we are studying alternatives but to date we have not found any convincing solution."

end



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ZOOM

The Italian cuisine goes to Unesco

Nothing like food expresses the Italian cultural identity. It is time the Unesco acknowledges its intangible value. The initiative to promote its candidature.

"What's Italian cuisine? It's trust and feast!", answers, after a brief consideration, Maddalena Fossati, editor-in-chief of 'La cucina italiana', historic magazine on food and wine, today part of the Condé Nast Group.

Numerous words and adjectives may describe the Italian culinary tradition, or better, traditions. Every region and city, every family, in fact, has a plate that describes its history. All Italians identify themselves with the action of preparing a meal to share with the people they love the most. Well, Italian cuisine isn't only about food. It is a real cultural heritage, which deserves an official recognition. That's why, during the lockdown, Maddalena has decided to start an initiative to create a public debate and support the inscription of the Italian cuisine on the list of the intangible cultural heritage of humanity. We talked about it together on a late summer afternoon.

"Unesco is my obsession! I felt the Italian food tradition needed an acknowledgement", Maddalena Fossati comments. "Due to the pandemic, all top-level chefs found themselves cooking in kitchens like ours. Day by day, I realised that, during quarantine, they were showing their human side. It was the right moment: the most renowned ambassadors of our culinary tradition had entered our homes!"

On March 19th, on Gualtiero Marchesi's birthday, an interview with chef Chicco Cerea started the organization of an immense project. The initiative has involved chefs, companies, consortia, anyone who can support the candidature. In fact, in order to be registered on the representative list, an element must have the widest possible participation of the community, groups or individuals. The procedure of inscription is complex: it is necessary to define precisely the element to candidate by drawing up a proposal, which is sent to the Italian national commission for Unesco, that forwards the file to the ministry of Culture. Following a meticulous assessment, the proposal is submitted to the Intergovernmental committee for the safeguarding of the intangible cultural heritage in Paris.

"It is a non-profit initiative, on the contrary, it must have a persistent cultural value. And it is necessary to promote activities to protect this element", Maddalena explains. "It is a sort of engage-



ment for the people and organisations that proposed an element to keep supporting it". There is no doubt, anyway, that a possible acknowledgement of the Italian culinary heritage may also support the agri-food supply chain, exporters and all food producers that bring Italian quality in the world. "I wish I will never hear the word 'parmesan' again!", exclaims the editor-in-chief. "Such an important acknowledgment would help solving the Italian-sounding problem, which is related to quality. Making everyone eat better is Italy's mission in the world. We also have the advantage that the Mediterranean diet has already been acknowledged and that Italy's biodiversity provides us with good ingredients. It is in our Dna and that we take for granted!"

"I think Italians consider the kitchen the place where their identity is expressed at its best. More than anything else. In the kitchen, we find our culture, memories, and society. There is everything", she adds. History, culture, society, national identity, economy. That's the Italian cuisine. Such an heritage deserves an acknowledgment, doesn't it?"



Maddalena Fossati

Un patrimonio da valorizzare

Ogni italiano vede espressa nel cibo la propria identità culturale e storia familiare. E non solo. La cucina è convivio, fiducia, società ed economia. Per Maddalena Fossati, direttrice della rivista La Cucina Italiana, è tempo che l'Unesco ne riconosca il valore. Ha dato così il via a un'iniziativa per promuoverne la candidatura a Patrimonio culturale immateriale. Ne abbiamo parlato insieme un pomeriggio di fine estate.

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FOCUS ON

How to... do business in Germany

The main retailers and the strategies to succeed in the mass market. Food trends before and after Coronavirus. In a webinar organised by the Italian trade agency.

The German mass market was in the limelight during a webinar organised by the Italian trade and investment agency (Ita). On Tuesday 7th July, interns had the chance to delve into the market structure and trends and into the strategies to conquer German retailers. The organic sector, as well as the Kaufhaus des Westens malls, best known as KaDeWe, were also a focus of attention. The webinar was titled 'Food retailers in Germany: from offline to online', yet, sales channels were not actually tackled. Nevertheless, the speakers' presentations were useful for Italian food producers. The webinar, in fact, was part of a series of events organised by the Italian trade agency, in collaboration with the ministry of Foreign affairs, to provide Italian companies, especially Smis, with an overview on foreign markets and on the possibilities to expand their business. The main goal of the initiative was to promote the Italian agri-food sector through the dialogue with professionals and experts. Several speakers took part at the webinar: Damiano Francovich, ministry of Foreign affairs; Francesco Alfonsi, manager of Ita in Berlin; Michael Roos, founder and director of Roos agency, specialised in business marketing; Andreas Perkov, buying & business development food manager of KaDeWe; and Roberto Pinton, from the Italian organic association AssoBio.

Retailers in Germany

Edeka, Rewe Group, Schwarz Gruppe, Aldi, Amazon are the five main retailers in Germany for turnover, market share and growth rate. Together, they account for 70% of the food retail in the Country, which is worth 272 million euros, according to data of the Roos Agency. In further details, Edeka and Rewe have integrated different sales channels: supermarkets, hypermarkets, wholesale markets, discounts, food service. While the Schwarz Group includes Lidl and Kaufland, which is the most widespread supermarket in Germany with over 650 points of sale and that may take over 80 to 100 Real supermarkets. Also Aldi is split in two independent groups, Aldi Nord and Süd. Among the first 30 German retailers, it is worth mentioning Denree and

Alnatura that respectively rank 18th and 25th and that are both organic food supermarkets.

In Germany, discounters account for 40% of the food retail market, despite in 2020, for the first time in twenty years, sales in supermarket have increased twice as fast as those of discounters. Consumers in fact choose the products they buy according to quality rather than to price. They also look for an interesting in-store experience. The leading discounter in Germany is Aldi, followed by Lidl, Netto (Edeka's discount banner), Penny (Rewe group) and Norma.

Also online sales have a paramount impact. In fact foods products recorded the fastest online growth in 2018. This is why every big retailer in Germany has an e-commerce platform, despite Germans are pretty conservative and sceptical in buying food, especially fresh products, online.

How to conquer the German market?

In order to succeed in German supermarkets, it is necessary to take into account some key aspects of the organisation and structure of each chain and of the German mindset and way of doing business.

First of all, the contact person is different depending on whether a product is to be sold in a single store or in the whole country. As a consequence, a brand wishing to submit its products to retailers may have to deal with the head-office, the regional-office or the manager of the individual store. At least at the beginning, the Roos agency suggests integrating a German sales agent or a German team, not only for a matter of language, but also of mindset. Supermarket chains in fact often prefer or appreciate if their client speaks German. The agency also suggests choosing a local distributor to collaborate with: negotiating prices and making products available will be much easier. It may also happen that a retailer requires to refer to its supplier.

How to meet and get in touch with retailers? Many and different options are available. Despite exhibitions have now been cancelled or postponed, they are one of the major channels to meet buyers and

suppliers. It is crucial to get in contact with commercial agents and establish a continuative relation with them through courtesy visits, phone calls and e-mails. It may also be necessary to buy advertisements on B2B magazines to introduce your brand, its history and products.

The ability of negotiating and defining prices and contracts is not of minor importance. Buyers appreciate – and expect – that the company they get in touch with invests in adv and communication. They also ask sale prices, costs and logistic details. It is not rare that retailers demand a 'listing fee' to put on the market a product. German buyers don't like to waste time. This is why brands willing to conquer the German market should be ready to answer any question and to soon define all details. The German market has a great potential, at the same time competition is fierce. Michael Roos suggests starting from few stores and cultivating patiently, in the course of time, the business.

Trends in 2020

When dealing with market trends, it is necessary to make a distinction between what used to happen before the Coronavirus and what is happening today. Until a few months ago, environmentalism and all its related topics were the leading trends in the food industry. Zero waste and plastic reduction policies were adopted. Consumers looked for local and regional organic products and were interested in corporate social responsibility initiatives. Those who care the most about health and wellness preferred vegan and vegetarian products.

With the spreading of Covid-19, consumers have changed their purchasing behaviour for the benefit of large stores, where they can do their shopping once a week, renouncing to choose their meal every day. Also food safety has become a major issue for consumers, together with the origin of a product and the observation of all hygiene rules in the production sites. During the lockdown, in addition, many families have started to prepare their meals at home and have known new ingredients and products.

La Gd tedesca: istruzioni per l'uso

I retailer teutonici e le strategie per conquistare gli scaffali al centro di un webinar, organizzato da Agenzia Ice il 7 luglio scorso, per i marchi italiani che intendono espandersi all'estero. Il seminario, dal titolo 'La Gdo Food in Germania: da offline a online', è stato parte del ciclo di eventi 'Made in Italy in diretta: restart with Ice'. Obiettivo dell'iniziativa è promuovere l'agroalimentare italiano e la sua diffusione attraverso il confronto con professionisti del settore ed esperti. Sono dunque intervenuti: Damiano Francovich, a capo della Direzione Sistema Paese della Farnesina, e Francesco Alfonsi, direttore dell'ufficio Ice di Berlino; Michael Roos, fondatore e direttore dell'agenzia Roos, specializzata in promozione aziendale; Andreas Perkov, responsabile Buying & Business Development Food del Gruppo KaDeWe; e Roberto Pinton, esperto dell'associazione AssoBio.

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THE INSIGHT

Labels: instructions for use

Etichette: istruzioni per l'uso

L'esperimento di Intermarché con la percentuale di ingredienti francesi e il parere di alcuni retailer italiani. Il nuovo libro di Cass Sunstein, economista ed ex consulente di Obama, secondo cui le informazioni presenti sul packaging sono ormai troppe. Con effetti perfino controproducenti. I sistemi di etichettatura valutati da due nutrizionisti su fronti contrapposti. Spunti per un dibattito sempre più acceso. Dove la comunicazione gioca un ruolo cruciale.

Intermarché's trial, based on a percentage rate of ingredients of French origin, and the opinions of some Italian retailers. The book published by Cass Sunstein, a former advisor to Barack Obama and behavioral economics expert, who points out that there is too much information on packaging (with counter-productive effects). The debate is fierce in both the Old and New World, where communication plays a strategic role.

The French (Origin) Revolution

Intermarché is trialling a label with the percentage of ingredients of French origin in its Private labels. E.Leclerc and Lidl France are also trying to introduce similar systems.

At the end of 2019 Intermarché France introduced a new labelling system to promote local food, Franco-Score, to provide consumers with information related to the content of French ingredients in its many private labels. The label on the packaging represents the origin of unprocessed items, displayed in calibrated percentage as well as its place of manufacture. According to the retailer, Franco-Score aims to promote the origin, expertise and quality of French food items. Only when all ingredients

have French origin, the "100% French ingredient" claim can be used. As reported by the Italian magazine Il Fatto Quotidiano, for a cooked ham the label said that it was produced with the meat of pigs born and raised in France, but with imported salt. The label said: "Produced in A' Saint Evazec with 92% of French ingredients." Nothing can be understood about the quality of the farms (where are they? are they intensive? how is animal welfare considered? are suppliers paid fairly?). All that consumers are allowed

to know is that the cows are French. Alone, the origin of an ingredient can't be a real quality guarantee. Yet, the Covid-19 pandemic has further enhanced this exasperated French nationalism and Intermarché's labeling system has been highly promoted.

The projects of E.Leclerc and Lidl France

Again at the end of 2019, another big French retailer, namely E.Leclerc, started its own labeling project focused on

the origin of the single ingredients, just like Intermarché did just a couple of months before. The new label was immediately applied to the products of the Marque Repère, Nos régions ont du Talent, L'origine du goût and Tradizioni d'Italia ranges, and further extended to the other Private labels. In March 2020, Lidl announced its intention to start a similar project for its Private labels, yet with no percentage rates. The French flag was indeed displayed only on products made with 100% French ingredients.

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*Its secret?
A matter of waiting for the right moment.*

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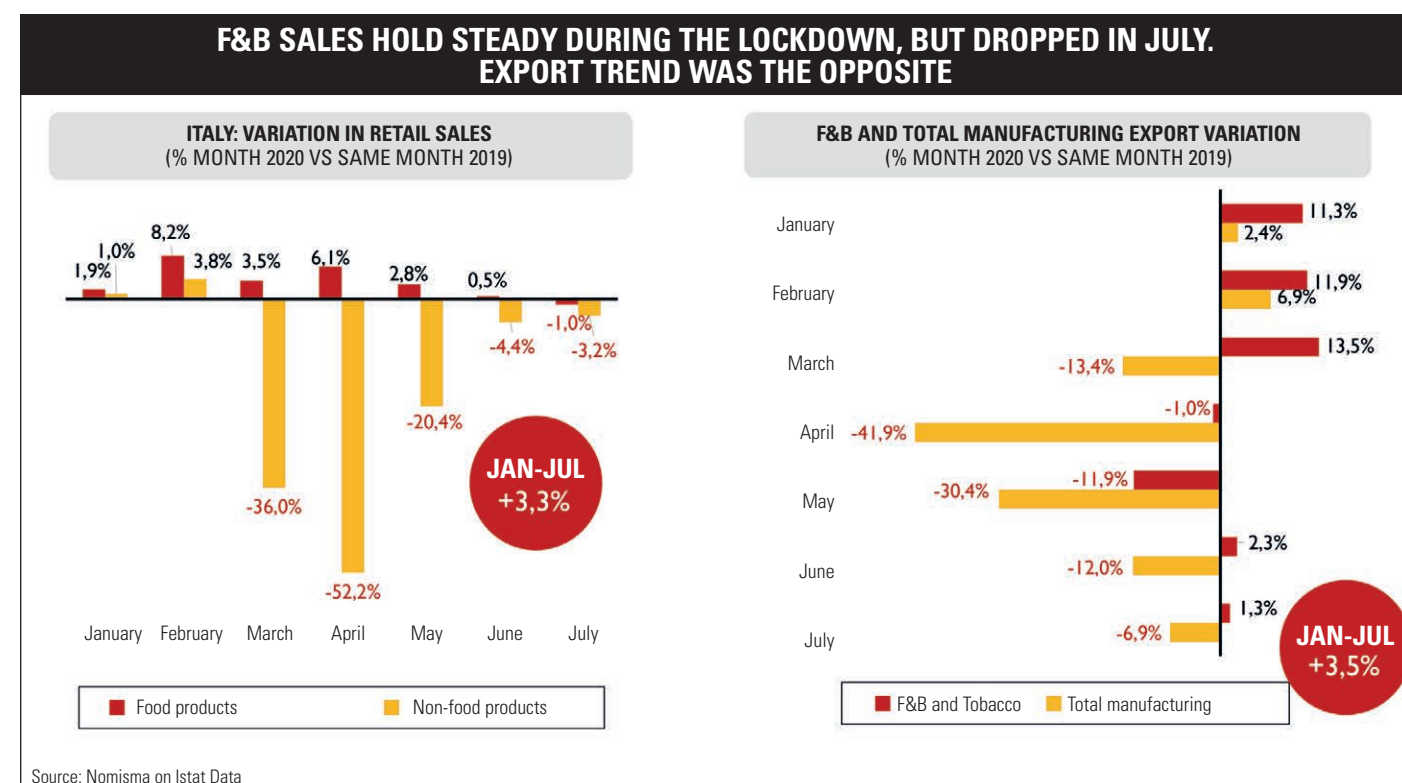
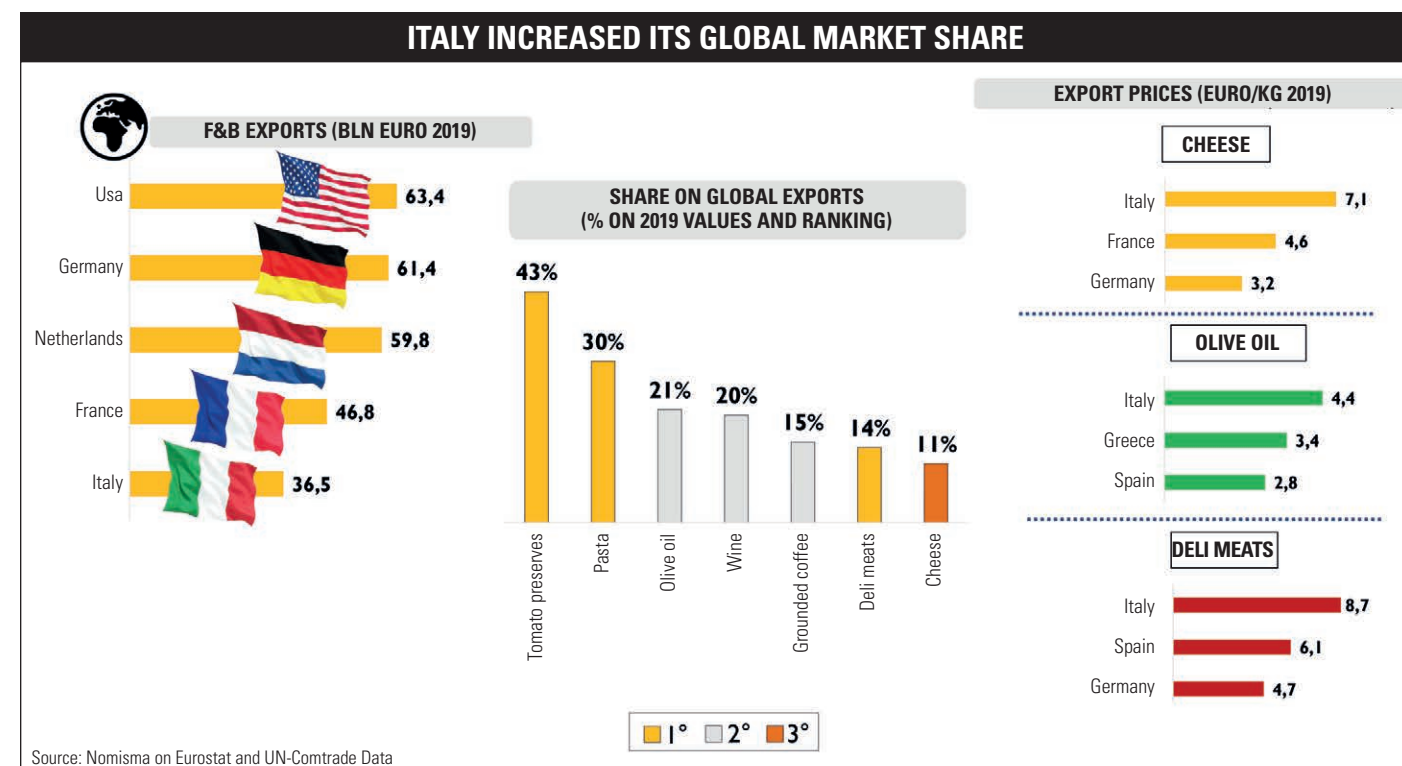
PARMACOTTO



THE INSIGHT

"If food wins, Italy wins"

The future of the sector beyond Covid-19 was a key topic during the webinar organized by Centromarca and Ibc. According to the Nomisma research institute, only 20% of companies expects a revenue increase in 2020.



L'industria alimentare oltre il Covid-19

"Non è più l'epoca del 'piccolo è bello'. Oggi è fondamentale essere organizzati". Così Paolo De Castro, europarlamentare e componente del comitato scientifico di Nomisma, sintetizza lo stato di salute dell'industria alimentare italiana in occasione del webinar promosso da Centromarca e Ibc, lo scorso 24 settembre. Per l'occasione, è stato presentato l'ultimo rapporto Nomisma da cui emerge che solo il 20% delle aziende prevede un fatturato in crescita nel 2020. Presente alla diretta streaming anche il ministro dell'Agricoltura, Teresa Bellanova.

"The 'small is beautiful' era has passed. Today, we need to be organized". With these words Paolo De Castro, MEP and member of the Nomisma's scientific committee, takes stock of the 'state of health' of the Italian food industry during a webinar organized by Centromarca and Ibc on the past 24 September. Francesco Mutti, president of Centromarca, and Alessandro D'Este, head of Ibc, took part in the event together with the Italian Minister of Agriculture, Teresa Bellanova.

Worries for an uncertain future

The industry, that generates 20% of the added value of the entire food supply chain, has confirmed its key role for the whole Italian economy. Furthermore, between 2008 and 2019 the added value created by food processing companies has grown by 19% (the manufacture industry as a whole stood at 7%); employment grew by 2% compared to a 13% reduction in manufacture. Between 2009 and 2019, exports increased in value by 89%.

These are some of the figures provided by Denis Pantini, Nomisma's agri-food manager and editor of the report 'The Italian food industry beyond Covid-19'. The study also investigates the worries of entrepreneurs on the effects of the big lockdown. The halt to the food service - whose consumption accounts for 34% of total food & beverage in Italy - and the uncertainties related to the evolution of the sanitary emergency represent a major concern. "Only 20% of companies expect a turnover increase both in the domestic and foreign markets this year. For 15%, the turnover will remain steady and in line with the previous year, while for 62% the year will close with a contraction in sales (more than 15% for 38% of companies). The turnover trend confirms the expectations: -9.5% in April (over the same months in 2019), -5.8% in May and -1.1% in both June and July," Pantini said.

Food exports hold steady but be aware of investments

The importance of the food processing industry was confirmed in the first seven months of this year. Grocery food retail sales grew by +3.3%; while other

THE INSIGHT

products registered a -17.6% drop compared to the same period last year. As regards exports, the first seven months show a positive result for the Italian food industry (+3.5%) compared to an overall drop in total exports, equal to -14%. The survey, carried out among 200 Italian food & beverage companies, shows that 42% of exporters registered a decrease in their global business while 35% of companies fear, for the future, a loss in their international positioning due to the more prominent role played by local businesses.

When investing, caution prevails. Before the onset of the emergency, 82% of companies had planned investments this year, but the lack of liquidity, the difficulties in accessing credit and the negative economic contest are pushing 38% of companies to reorganize them and 31% to postpone them. The remaining 31% of respondents plans to maintain the investments, especially for the purchase of production plants and machinery (86%), new technologies (46%) and research and development of new products (39%).

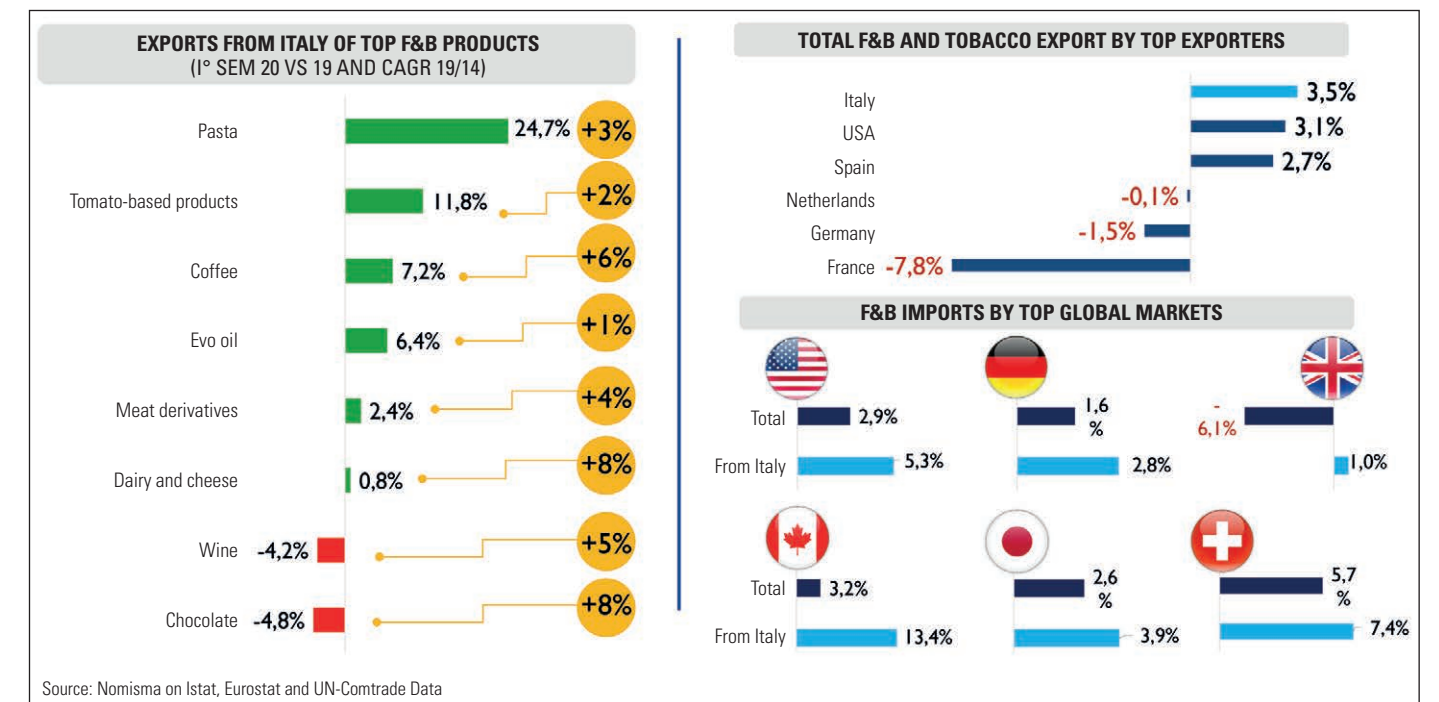
Mutti: "Team play is fundamental"

"Food companies are resilient", said Francesco Mutti, president of Centromarca. Yet the big issue, now, also considering the strategic role of this industry, is: which drivers can enhance the supply chain? According to Mutti, there are three: "Increase competitiveness, reduce bureaucracy, increase the size of companies. The fact that many companies have less than 10 employees makes exports and investments difficult. As a result, 0.2% of companies develop about 50% of total exports in the sector."

The connection with tourism is also fundamental: "Team play is our country's sole chance to achieve the goal. Attracting tourists should be the priority. We also have fragile supply chains due to adverse weather conditions. We need certainties, rules that facilitate the possibility of bringing companies together. Because the game must be played on a more and more international scale, based on a high-quality training, on facilitating the merger of companies, on competitiveness."

D'Este: "Quality and sustainability should go hand-in-hand"

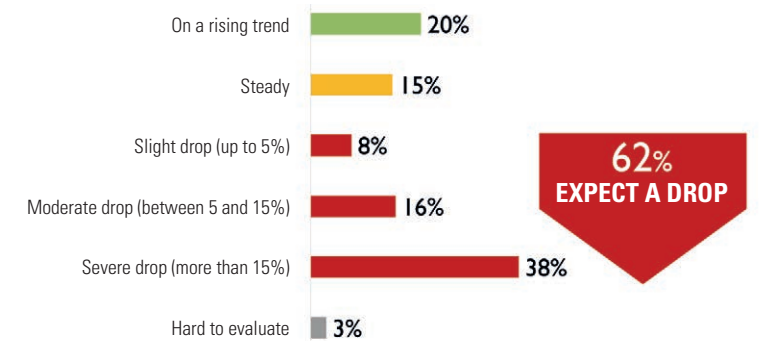
"The Italian agri-food industry is 'condemned' to make quality products," said Alessandro D'Este, president of Ibc. "This constant attention to quality is also our big strength: the Italian combination of culture and food tradition is recognized and appreciated across the world," he continues. To compete in this modern scenario, as De Castro said in the beginning, the 'small is beautiful' attitude loses much of its value: "Small is beautiful if a company is capable of responding to the challenges of our time," D'Este explains. "The digitalization of



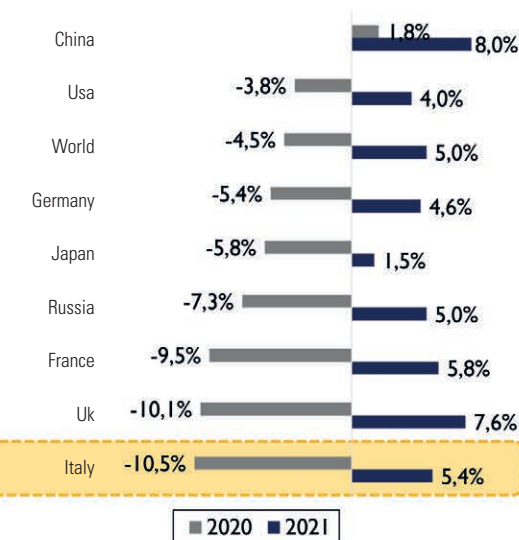
NOMISMA SURVEY

* survey made on a sample of 200 Italian f&b companies between April and May 2020. 28% of respondents have a turnover below 2 million euro, 34% between 2 and 10 million euro, 26% between 10 and 50 million euro, 12% above 50 million euro

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GDP VARIATION 2020/2021*



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relationships with consumers, exports, the ability to sustain quality. And we are not talking about product quality alone, but also the support to values in sustainable terms. Italy is already among the leading countries on this front, but we need to communicate better. These are all challenges that require the largest investments."

Bellanova: "If the food wins, Italy wins"

At the end of the webinar, Teresa Bellanova, Italian Minister of Agriculture, said in live streaming: "The months of the pandemic have made us understand

the need to guarantee food for all. The crisis we have been facing is far from over: our priorities are the strengthening of the domestic market and of export-oriented policies as well, especially in foreign markets that can 'afford' made in Italy. As I often repeat, not even one euro must be wasted and each euro must produce at least two. In recent months, for instance, we have invested more than 2 billion euros to support the sector."

Bellanova also highlights the commitment on two strategic fronts, food service and the Nutriscore labelling system: "Support to food service was

given upon one condition: the purchase of Italian products. While our opinion on the Nutriscore has always been clear: we are against labelling systems that define food products as good or bad, to the detriment of the Mediterranean diet and of our Appellations of origin. Hence, we have presented the basic principles according to which there should be a labelling on the front of the package. We ask for transparency on the origin of raw materials. Another cornerstone is the fight against unfair practices: we want to strengthen our system with uniform rules for all". And concludes: "If the Italian food wins, the whole country wins".

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THE INSIGHT

Nutriscore, or Nutrinform, that is the question

Exchange of views between professors Luca Piretta and Mauro Serafini on labelling systems. Under the spotlight: pros and cons of the two solutions, their utility and consumers' food education.

Nutriscore and Nutrinform under the spotlight. We asked two experts - Luca Piretta, professor of Nutrition and Diseases of the gastrointestinal tract at the university Campus Biomedico in Rome, and Mauro Serafini, professor of Human nutrition at the university of Teramo - to answer six questions, the same, to figure out all pros and cons of the two labelling systems. We also asked if labels are actually useful to make consumers aware of healthy and balanced food habits. Despite the one supports the Nutrinform, the other the Nutriscore, they come out with an interesting common point of view: labels are not that useful. It is necessary to educate consumers since their childhood.

Which are the pros and cons of the Nutriscore?

LP: The Nutriscore is based on an intuitive idea: when you eat less fats, sugars and salt, all the rest is healthy. It is not the truth: fats, sugars and salt are not bad for your health. While what's bad is overeating them. Fats are essential for health. It would be right to suggest balancing all nutrients. The Nutriscore looks very simple, intuitive and correct, but it also involves some risks: consumers don't buy products showing a red 'E'. For example, olive oil, which contains 99% of fats, is marked with a red 'E': in this case, a consumer would prefer not to eat it to reduce fats intake, yet he would deprive himself of essential nutrients for health, such as vitamins, antioxidants and polyphenols. The same accounts for Parmigiano: it is relatively rich in fats and salt, but it is also a source of calcium, phosphorus and proteins. In addition, criteria used to create the Nutriscore system are absolutely arbitrary and related to economic nationalisms to defend. It is a coercive system rather than educational. Another fault of the Nutriscore is that it provides information based on 100 grams of product rather than on a portion. It is misleading. Nobody eats 100 grams of oil per day. On the contrary, pizza weights at least 600 grams.

MS: Any labelling system is incomplete. They must be complemented by a large number of awareness campaigns addressed to consumers. In my opinion, the Nutrinform is a good labelling system and it is immediate, which is very important. It doesn't require calculations. In addition, it is easy to read and understand. It provides fast key information, based on scientific data, on a product's nutritional values. It provides data based on 100 grams of product, which may be a disadvantage when not explained: we clearly eat more than 100 grams of pizza! All values are expressed for 100 grams of product in order to make it easy to compare different groups of products. This is how the debate on olive oil was born: it will never be marked with an 'A' as it belongs to fats, which cannot be overeaten.

Which are the pros and cons of the Nutrinform?

LP: The Nutrinform communicates the quantity of critical nutrients (calories, total fats, saturated fats, sugars, salt) contained in a portion instead of in a reference amount of 100 grams. It shows how much each nutrient fills the daily energy battery. It makes consumers aware of what they are buying without influencing them. It is a graphic system of information which requires consumers to already have a good cultural basis. It isn't simple at all. On the contrary, the Nutriscore is very immediate.

MS: I am sceptic about the 'battery system'. There are three key points to highlight. First of all, the Nutrinform is based on the nutrition needs of an adult, that is to say 2 thousand kcal per day. But we are all different and have diverse necessities. In addition, it demands consumers to make calculations to fill the battery. Finally: it creates paradoxes. For example, sugars in fruit are different from sugars in soft drinks. But the battery classifies all the nutrients in the same way, no matter where they come from. Therefore, companies, who choose how big their portions are, can paradoxically change the portion/content ratio to correctly fill the battery. In addition, sugar can be assumed both from known and unknown sources, such as fruit and vegetables that, in most of the cases, do not have a label. Despite this, the amount of sugars assumed through fruit and vegetables must be monitored as well. Both the systems have pros and cons. Therefore, regardless of the system chosen, it is crucial to carry out awareness

campaigns to make people understand what to eat. Then it is necessary to integrate the suggestions showed on the label with healthy food habits.

The Nutriscore has been repeatedly accused of discouraging the consumption of typical products of the Mediterranean diet. Is that true?

LP: It is a forced interpretation. The Nutriscore doesn't consider that a product, despite containing fats, may also contain healthy elements: vitamins, minerals, antioxidants and polyphenols.

MS: No. It is true that some typical foods involved in the debate - cold cuts, hams, etc. - are part of the Mediterranean diet, but I think that no one would ever suggest eating cold cuts and ham every day in a balanced diet. The Nutrinform reflects the need of limiting consumption of this type of food. I don't think it's a French operation to discredit Italian products: also French cheeses have a low mark, as cheese cannot be considered a healthy food. It doesn't mean that it mustn't be consumed. It is necessary to control its consumption.

How many consumers actually read labels, in your opinion?

LP: Very few! I completely support the Nutrinform, but I am also a pragmatist. The vast majority of consumers don't read labels. They buy some products because they are used to them, or because the packaging is catching and the claim is appealing. Or even by he-

Nutriscore, o Nutrinform, questo è il dilemma

Nutriscore e Nutrinform sotto la lente di ingrandimento. Abbiamo sottoposto a due esperti - Luca Piretta, professore di Nutrizione e Patologie digestive all'università Campus Biomedico di Roma, e Mauro Serafini, professore di Alimentazione e Nutrizione umana all'università di Teramo - sei domande, le stesse, per tracciare un quadro completo su vantaggi e svantaggi dei due sistemi di etichettatura. Abbiamo anche chiesto quanto le ritengono efficaci per educare i consumatori a una dieta sana ed equilibrata. Nonostante sostengano l'uno il Nutrinform, l'altro il Nutriscore, dal confronto è emersa un'interessante visione comune: le etichette servono a poco. Occorre educare i consumatori fin dall'infanzia.



Mauro Serafini



Luca Piretta

arsay.

MS: If everyone were like me, very few! I think that less than 50% of consumers read nutritional labels: it is very difficult for them to understand how the amount of each nutrient in a product actually influences the energy intake. I think the Nutriscore is easier to understand than the 'battery system'. Consumers should always calculate precisely the energy intake of each meal. Otherwise it is difficult to adopt the Nutrinform! In addition, many foods are not classified through this labelling system, such as fish, fruit, vegetables and legumes people buy at the market.

Do you think that the two labelling systems can really encourage consumers to choose healthier products and to adopt a more balanced diet?

LP: No, they are not sufficient. In fact, labels are maybe the least affecting tool to educate consumers. This is the reason why it is important to make clear rules on labelling now. And it is crucial that producers

understand that, while adopting nutritional labels is now discretionary, if in the future their adoption becomes compulsory and the Nutriscore is the most widespread system, then it will be the one officially chosen. So, it is necessary to make food producers aware that the Nutrinform is better, even for their turnover. In few words: labels are only a piece of the huge food education jigsaw. But the Nutrinform can be part of an educational system, on the contrary, the Nutriscore cannot.

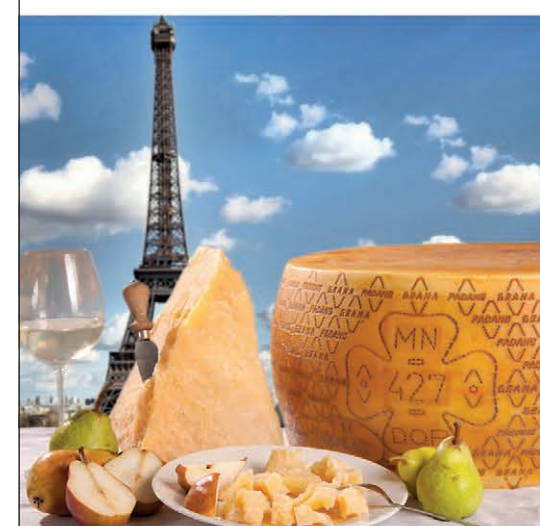
MS: A lot in my opinion. It always depends on the consumer's willingness. At least 80% of the Italian population know that they should base their food habits on vegetal products, but they very often don't follow a balanced diet, despite they know what they should do. This is the reason why the Nutriscore, if correctly understood, can help, even more than the 'battery system'.

How should consumers be educated to a correct diet?

LP: Food education is based, like all educational systems, mainly on the example given by the family, school teachers and restaurants. Food education should involve not only the type of food consumed, but also portions, meal times, cooking methods, only finally, labels on pre-packaged products. Education takes time. We will get there with the new generations. In the future it will be inevitable. It is complicated and requires a solid cultural basis. But I think that Italians already have a good knowledge of healthy nutrition.

MS: It would be important to start from schools. It is crucial that children learn, from a very young age, how food influences the environment and their health. Also awareness campaigns are necessary. The world of research on food and nutrition should also be able to carry out more real-life studies. We've been providing the very same recommendations for fifty years, they are the right ones, but it seems that people can't follow them at their best.

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THE INSIGHT

“Too much information doesn’t help”

Transparency on labels doesn’t always bring benefits. On the contrary, they are often counter-productive. The theory expressed in the new book by Cass Sunstein, economist and former advisor for Barack Obama.



“Troppe informazioni in etichetta”

Cass Sunstein è un economista della Harvard Law School, studioso di diritto e già consulente di Barack Obama dal 2009 al 2012, quando ha ricoperto la carica di dirigente dell’Office of information and regulatory affairs del governo americano. A settembre è uscito il suo libro ‘Troppe informazioni in etichetta: capire ciò che non volete conoscere’. Un saggio sulla trasparenza, dove la tesi è che le informazioni obbligatorie in etichetta non sortiscono gli effetti sperati e, il più delle volte, sono perfino controproducenti. Questo vale in particolar modo per l’indicazione di calorie, grassi, sale, zuccheri nei prodotti alimentari. Tipico esempio di questa deriva è la tanto discussa etichetta a semaforo, o Nutriscore, accusata da più parti di penalizzare ingiustamente il made in Italy e molto popolare in Francia. A questo sistema di etichettatura, Federalimentare contrappone quello ‘a batteria’, non focalizzato sui nutrienti del prodotto, ma sulle quantità giornaliere raccomandate.

Cass Sunstein is an economist at the Harvard Law School, a law scholar and former advisor for Barack Obama from 2009 to 2012, when he was also manager of the Office of information and regulatory affairs of the United States. His book ‘Too much information: understanding what you don’t want to know’ was published in September.

It is an essay on transparency destined to raise a lot of discussion. His theory is extremely against the mainstream: compulsory information on labels doesn’t bring the desired effects. Most of the times they are even counter-productive. This applies especially when it comes to information on calories, fats, salt, sugar in food products. But also for energy efficiency labels on household appliances. Or for the so-called ‘ethical labels’, which communicate that raw materials used do not come from war zones (in case of minerals) or that a consumer contributes to a fair cause by purchasing a product.

Well, Sunstein disputes this system in a long and articulate interview for the Italian magazine Il Venerdì di Repubblica, where he destroys many consolidated beliefs on labelling methods. One above all: having as much information as possible is the best way to make a decision.

It all started with pop corns...

To support his theory, Sunstein confesses that he “tarnished Americans’ pleasure of cinema and pop corns”. What is it about? “When I used to work for the government, we studied solutions such as labels showing calories for restaurants and fast foods. I suggested to use them also on foods sold in cinemas. When all these rules became law, I wrote to a friend to celebrate what I considered a personal accomplishment. He answered: ‘Well done, Cass, you spoiled pop corns’. Here is the reason for such a reaction: “When people go to the cinema, they want to enjoy their free evening. They don’t want to think that they’re getting fat because of pop corns”, the economist explained. “Who reads these labels usually doesn’t have problems of self-control on food and has a low obesity risk. On the contrary, those having such problems avoid reading labels not to ‘spoil pop corns’. Then, a negative outcome in both cases. Governments should make more in-depth assessment on costs and benefits of compulsory information”.

More information to make better decisions?

The economist considers that expressing clearly information may also encourage risky behaviours: “Sometimes it is better to know less. We know that in the United States the poorest are prone to spend their (little) money in foods having more calories per dollar. Therefore, for this type of consumer, labels showing calories turn out to encourage them to eat fast foods, so to increase – rather than lower – obesity”.

It also applies to Gmos: “Choosing to inform consumers, regardless of the type of information, may even sound alarming. Therefore, they avoid buying a product. As for today, there is no scientific evidence that Gmos are harmful. Nevertheless, citizens might think that the government imposes to explicit it because they ‘know’ Gmos are harmful. In this case, consumer’s perception of the government’s intentions is misleading”. Also the effect of ‘ethical’ labels – showing, for example, that tuna was fished avoiding the by-catch of dolphins – are still to be demonstrated, in Sunstein’s point of view. “They risk to allow the most sensitive consumers to express their ideals without having a real impact on dolphins”.



Consumers are creatures of habit

Sunstein also highlights another key point: whatever happens, consumers’ habits die hard. “Some consumers do not change their purchase behaviour no matter what they are told: reminding them that crisps are fattening or that smoking causes cancer has no practical effect on their health; it only worsens the neurogenic side of their consumption experience. Governments should rather ask restaurants to show risks for health in a more customised way, for example via app, not to ‘spoil pop-corns’ aimlessly to everyone”. Therefore, in the future, more and more personalised communication systems will be used in accordance with consumers’ needs and requests. It will be the end, or, at least the slow-down, of the ‘ethic’ trend that aims at educating consumers prescribing what to buy or not. A typical example is the Nutriscore, the long-discussed traffic light label, which is very popular in France and which is accused of penalising unfairly made in Italy products. Federalimentare, the association of the Italian food industry, opposes to the Nutriscore the ‘battery’ system, which is focused on the recommended daily calories intake rather than on the nutrients contained in a product. This way it avoids demonising a food product or another. Labelling systems are a hot topic. The debate has never been so heated.

The author



Cass R. Sunstein is Robert Walmsley University Professor at the Harvard Law School, where is founder and director of the Program on behavioral economics and public policy. From 2009 to 2012 he was chief of the White House office of information and regulatory affairs. Among his publications: *Simpler: The Future of Government* (2013) and *Nudge: Improving Decisions about Health, Wealth, and Happiness* (2008). In 2018, he won the Norway's Holberg Prize.

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FOCUS ON



It's, the new Market

The innovative format dedicated to food represents the ultimate shopping experience. A concept that mixes together top-quality ingredients and services. The project promoted by Italmark and Ingka.

It's called It's Market, which means Italian Taste Society, and wants to represent a new way of shopping. An innovative supermarket that symbolizes exclusivity, aggregation and identifiability. It's the new project promoted by Italmark (the Sun's company) together with Ingka Centres (Ikea's group), the owner of Elnos Shopping, the shopping center of Roncadelle, in the Brescia area, which hosts It's Market. The new store comes from the desire to enhance local excellences and meet the new needs of each consumer. The supermarket is proposed as an innovative format where the emotion of a family atmosphere perfectly manages to emphasize the characteristic of the supermarket of the future. It can combine the tradition of Brescia's historic businesses with new trends of food experience.

The future that looks at the past

Designed by L22 Retail, a brand of the Lombardini22 Group (among the leaders in the Italian architecture and engineering scenario), It's Market is an exclusive meeting place for those who choose the Italian spirit, the richness of the offer in terms of product and the uniqueness of the experience. The supermarket of the future is (also) a return to the past because strongly connected with the traditional concept of shopping in retailer and boutique. The atmosphere, friendly and sophisticated at the same time, is created by the feeling of a pleasant atmosphere. In fact, the historical, architectural and social research has represented the first piece for the definition of paths, materials, finishes and colors. Specifically, the perimeter of the surface sees the succession of fishmonger's shop, butcher's, gastronomy counter, bakery kiosk, pastry shop, ice cream shop and bar, wine bar, crates and infopoint. The colors and materials are calibrated to enhance the peculiarities

It's, il Market che cambia l'idea di supermercato

Si chiama It's Market, abbreviazione per Italian Taste Society, e vuole rappresentare un nuovo modo di fare la spesa. Un supermercato innovativo simbolo di esclusività, aggregazione e riconoscibilità. È la nuova sfida di Italmark (gruppo Sun) in partnership con Ingka Centres (gruppo Ikea) proprietario di Elnos Shopping, il centro commerciale di Roncadelle, nel bresciano, che ospita It's Market. Il nuovo punto vendita nasce dalla volontà di esaltare le eccellenze locali e di andare incontro alle nuove esigenze di ogni singolo consumatore. Coniugando la tradizione delle storiche attività bresciane con i nuovi trend della food experience.



of the different areas of the supermarket, where each corner and product sector has its own architectural treatment that makes it immediately recognizable. In fact, Marco Odolini, managing director of It's, explains that the store is closely linked to the territory when it is hosted: "It's Market is inspired by the history of Brescia also from a stylistic and architectural point of view. The extensive use of metal and steel gratings pays tribute to a city that, historically, has made work in the iron, heavy industry and manufacturing sectors its pride in the world".

The format dedicated to food that enhances the territory

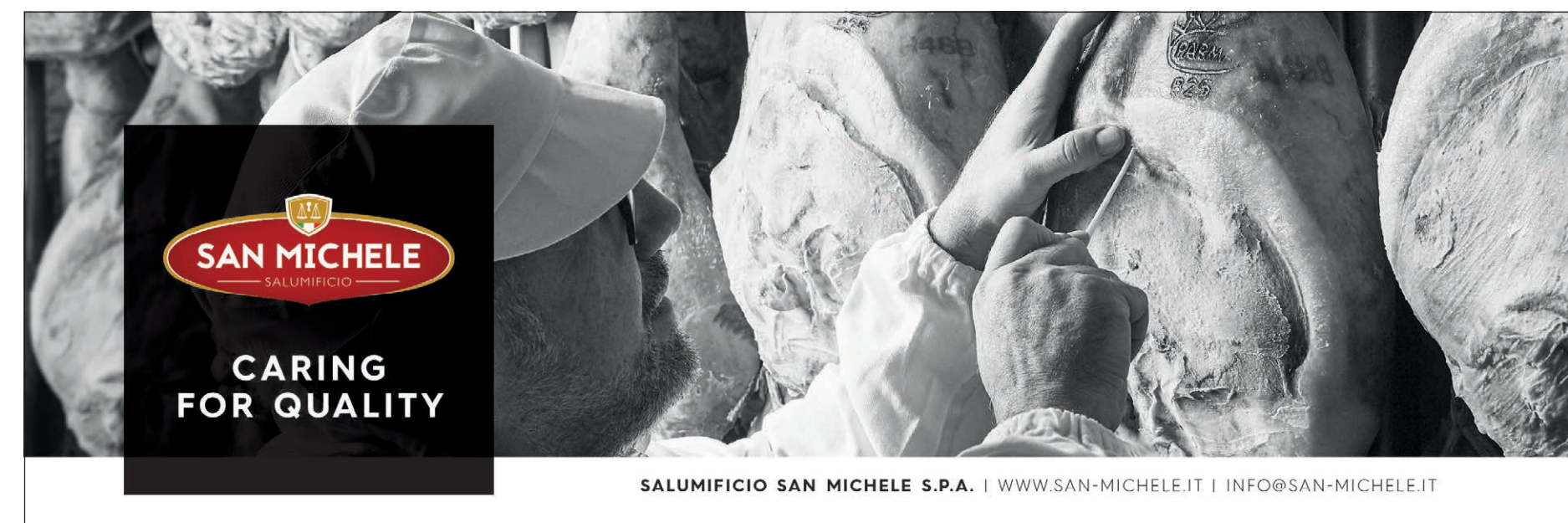
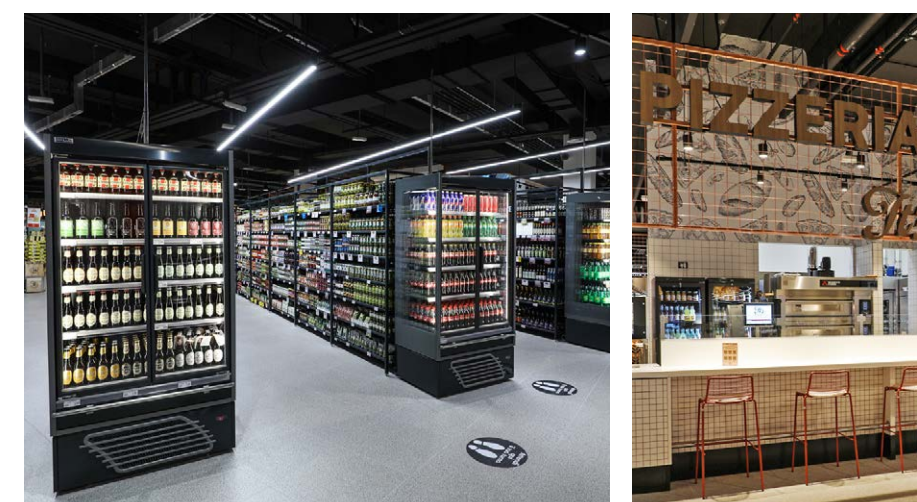
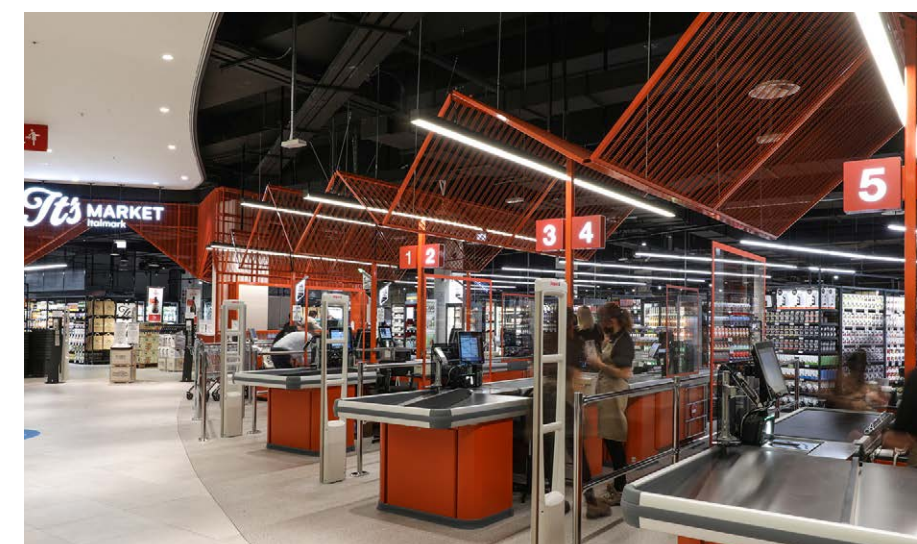
It's Market covers a total area of 3,079 square meters of which 1,877 are dedicated to sale and 487 to administration, with continuous hours from nine in the morning to nine in the evening.

Over 14 thousand products on the shelves of the store. Particularly important is the number of organic products, equal to about 1 thousand, destined to satisfy the growing demand of consumers. In detail, there are more than 1,100 goods of the Consilia brand, within which 800 are related to gluten-free products. Moreover, It's Market's particular attention to local producers is an important distinguishing feature, which is transformed into a competitive advantage thanks to its 550 local products and 1,500 excellent Italian food and wine specialties. It is important to underline that the assortment of It's Market is strictly food and the two pillars on which it rests are precisely the 'excellence of Italy' and the 'local producers': therefore, all the quality of great Italian food and wine and, directly from Lombard producers, a wide choice of selected references, from breakfast to dinner, identified in store with a specific tag. In addition, for the products in 'focus' there are

additional information explaining the plus of the article and the history of the producer.

A new spending experience

Nowadays, the way we eat and shop has inevitably changed. More and more people are looking for new flavors and an increasing quality of the products they bring on the table. The new supermarket was born with the aim of responding to these needs, embracing the world of food at 360 degrees. "One of the characteristics of It's Market is the possibility to try directly on the spot these excellent food and wine products and many other culinary proposals, without the need for the consumer to have access to the inside of It's", explains Marco Odolini. Here, each customer can build his or her own shopping experience on his or her specific needs and desires. This is why It's is the market that changes the idea of a supermarket. "A new way of experiencing shopping. A world of products to enjoy while sitting down, like in a restaurant, or to put in the shopping cart. A place where big brands and small producers live together, where anyone can have the chance to discover and taste totally new things and special products. Here you can come for a quick shopping, but also to browse or stop to eat something, enjoying a well-deserved break in the best Italian tradition. It's not just a store: it's an experiment in continuous evolution, which will be shaped in the coming months as we understand our customers' needs better and better," concludes Odolini. Thanks to a mix of innovative and original offers, therefore, the new supermarket is a candidate to generate sharing of flavors but also opportunities to meet, transforming the Roncadelle store into a pole of social attraction. In time, it will be more and more "a good idea to meet at It's".



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THE INTERVIEW

“Total quality is our mission”

The rescue of the Kipre Group by the Wrm fund. The relaunch of the Principe and King's brands in Italy and abroad. All the details of the acquisition in an interview with the company's ceo, Walter Bellantonio.

40 million euro is the investment made by Wrm Group to relaunch the Kipre Group. In mid-July, the Luxembourg-based society founded by the businessman Raffaele Mincione saved the Italian cured meat manufacturer – renowned for its Principe and King's brand – from a very complicated situation. With this operation, the Wrm Group acquired 100% of Kipre through the Athena Capital fund. Walter Bellantonio - former ceo and general manager at Isa and former ceo of Cirio, Del Monte Italia and Centrale del Latte di Roma – will head the group. While the Dukceovich family is 'leaving the scene'.

In December 2018, with a press release, the Dukceovich family announced the crisis of the group. What happened afterwards?

On the past 14 July, after a very long and complex negotiation with creditors, a debt restructuring agreement was signed and the final approval of the operation arrived on the 25 September. Which allowed the Wrm fund to become the sole shareholder of the Kipre Group.

And you became the person in charge of managing a heterogeneous and complex group...

I was contacted by the Wrm fund due to my long experience in the food sector. My first experience dates back to 1991, at Polenghi Lombardo, followed by Ala - Marzotto Group and then Cirio, Bertolli, and De Rica in 1993. Hence, I don't have any specific background in the deli sector, but I gained some experience in the food sector as a whole.

This acquisition was quite a 'brave' operation from the fund.

Yes it was. And I confess that figures were also difficult to understand.

What do you mean?

A company like this can't enter a similar crisis overnight. And therefore in all probability problems started years before. Yet, this was not clear looking at figures. The Group was certainly in a difficult situation and the Covid pandemic did not facilitate our job: since we couldn't be there in first person, an in-depth analysis was very hard to conduct. From an organizational point of view, the group is lacking. So it has to be rebuilt from the ground up. Maurizio Sperati, a skilled and valuable figure, is helping us a lot from a commercial point of view. But there is still a lot of work to do also in other divisions.

We are talking about a company that has important assets.

That's true: King's and Principe are prestigious and famous brands. So the operation is brave and interesting at the same time.

More will follow, in your opinion?

I think that the fund wants to be a main player in the deli sector. This is why I am building a team that can carry out such operations, with the aim of strengthening the sales and industrial divisions, and the agricultural one too. We manufacture both PDO and non-PDO delis, as well as antibiotic-free and animal welfare products. This allowed us to gain a leading position position in the United States, where an important investment has been made: we are the exclusive suppliers to Whole Foods Market (US chain acquired by Amazon in 2017) for San Daniele ham PDO and Parma ham PDO from pigs raised in compliance with high animal welfare standard and without the use of antibiotics since birth.

Yet the sector is not performing that good, especially for PDO hams...

For this very reason we need to differentiate ourselves and offer something new. To say it simply, we are searching for 'total quality'. A concept that need to be relaunched, because with brands such as King's – historic brand of San Daniele ham PDO and of seasoned specialties such as Val Liona, Granspeck and Snocciolato - and Principe, number one brand for di San Daniele Ham PDO in Italy and overseas, we can truly create a new market segment.

What is the goal for the near future?

Go back to the past. Let me explain: given the crisis, the group financed itself by partially selling the warehouse. And, as we know, a salted leg today becomes a good San Daniele ham PDO after around 16 months. So the path is long and tough. To return to the goals, I would say that we aim to have full weekly production capacity for both San Daniele (9,000 legs) and for our specialties (10,000).

And what about export?

We want to focus on antibiotic free and animal welfare. But there is plenty of opportunities in the deli sector. For instance, antibiotic free pigs can be an added value for cooked hams.

Will the production sites be maintained?

I met with the unions, and I asked them for more time to better understand.

How do you intend to proceed?

With six plants, we can't work without a manage-



Walter Bellantonio

“Puntiamo sulla qualità totale”

40 milioni di euro: questo l'investimento di Wrm Group per il rilancio del gruppo Kipre. A metà luglio, la società lussemburghese fondata da Raffaele Mincione salva così da una situazione complessa le aziende alimentari italiane conosciute con i marchi Principe e King's. Con l'accordo, Wrm Group acquista il 100% di Kipre attraverso il fondo Athena Capital. A guidare il gruppo sarà Walter Bellantonio, già amministratore delegato e direttore generale di Isa ed ex amministratore delegato di Cirio, Del Monte Italia e Centrale del Latte di Roma. Esce di scena dunque la famiglia Dukceovich. Ne abbiamo parlato proprio con Bellantonio, che non si è sottratto alle nostre domande.

ment control. We are therefore analysing the production cost and the margin for each single product. Afterwards we will make our decisions.

A complex operation in a heterogeneous group like Kipre.

Definitely. In my opinion, there are many products on which we need to evaluate the marginality, such as wurstel.

As regards wurstel, low price (and low quality) products have been suffering, to the advantage of the premium category.

And the Covid pandemic is further reshaping the market. Think of the growth registered in the pre-sliced segment and in plastic packaging. In a few months, everything has changed. Nevertheless, now the key factor is to understand the real costs and make our choices.

What strategies will you implement to relaunch the Principe and King's brands?



THE KIPRE GROUP



The company is active in Italy and abroad with the two brands Principe di San Daniele and King's, with 500,000 shares in the San Daniele Ham Consortium and 90,000 shares in the Parma Ham Consortium. The activity is carried out in six plants and three Italian regions, with four seasoning facilities, a plant for the production of industrial delis, and a plant dedicated to boning and slicing activities, as well as 11 slicing lines. To date, the Group employs over 300 workers.

THE WRM FUND

Wrm Group, directed by the Luxembourg based holding company Time and Life S.A., has been active since 2009 in private equity, special situations, corporate restructuring, real estate and non-performing loans (Npl), working closely with Italian and international institutional investors. The Wrm Group pursues a multi-sector strategy aimed at seizing investment opportunities in Italian companies, for the relaunch of companies that show solid industrial fundamentals and potential.

PASSION FOR EXCELLENCE

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CONFECTIONERY



Chocolate: what better treat?

A market worth 2.5 billion euros in Italy and 132 billion dollars on a global scale. The new consumers' tastes and the mega-trends that will shape the category in the next months.

The most beloved indulgence generates revenues for 2.5 billion euro in Italy and almost 132 billion dollars (around 116 billion euro) around the world. During the 'great lockdown', consumption skyrocketed in our country: up by 22% over previous year. Chocolate bars, in detail, posted a 21.9% growth rate.

Dark chocolate remains the most purchased va-

riety, chosen by around 40% of consumers, followed by milk chocolate and - at a certain distance - white chocolate. Besides the most traditional flavors, we are witnessing the birth of interesting varieties, that combine with cocoa an array of original ingredients: from pepper to orange, from rum to mint, including Himalaya salt. In addition to vegan, organic, and dairy-free chocolate, of course.

Cioccolato

Alimento 'comfort' per eccellenza, in Italia il cioccolato vanta un mercato da 2,5 miliardi di euro. Quasi 132 miliardi di dollari (circa 116 miliardi di euro) in tutto il mondo. Durante il periodo di lockdown, il settore ha fatto registrare incrementi a doppia cifra in molti mercati, compresa l'Italia. Un'analisi dei trend che stanno rivoluzionando il settore. E alcune delle novità proposte dalle aziende italiane del comparto.



TRENDING NOW

DESSERTS TO DRINKS

While dessert flavors in chocolate are maturing, drinks flavors are growing. This is because taste explorers are seeking new experiences and are hungry for novel sensorial delights. They are already embracing new and fusion-style beverages, so they are open to trying them in treats too. 71% of consumers say: "I want to try new and exciting chocolate experiences". 43% of consumers now enjoy cocktail/alcoholic/coffee/tea flavors in chocolate.

CACAO DISCOVERY

Today consumers are faced with unprecedented choice in chocolate. It means they are demanding evident added value to convince them to pay more. Cacao is the key to premium success, as the fundamental ingredient in chocolate. 55% of consumers say: "Chocolate which specified the origin of the cocoa beans is more premium." 54% of consumers say: "Upscale Chocolate has a unique story about where it came from or how it was made."

SEASONING TWISTS

As snacking increases and lines blur between categories, consumers are enjoying more sweet & savory moments. The opportunity for chocolate is to cross into new formats, offer more functional benefits particularly in dark chocolate, and go beyond salted caramel to draw on new sources of salt for the next generation of flavors. 93% of consumers snack, and 43% of them eat dark chocolate as a snack - mostly for a satisfying indulgence. 11% of consumers love "Spicy" or "Salty" chocolate, with growth in botanical flavors such as herbs, spices & flora.

TREATS LIKE ME

People love chocolates that feel personal and special. The opportunity is to transform chocolate from universal to unique, especially in gifting. 37% of consumers say they "prefer exclusive or limited edition chocolate." 43% of consumers say they want "tailor made chocolate that is the perfect fit for me."

WHOLESUME BITES

Maintaining a high quality of life is important to consumers that want to stay 'forever young'. This desire to live actively for longer means they care more about chocolate matching their lifestyle. 64% of 'healthy agers' say: "Chocolate needs to be tasty and good for me." 54% of consumers love 'Nutty' chocolate, vs. 36% for 'Fruity' and 25% for 'Dessert' flavor. Source: Barry Callebaut

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MINI RONDÒ
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CHOCOLATE
BARS: MILK,
DARK, MILK WITH
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WITH HAZELNUTS
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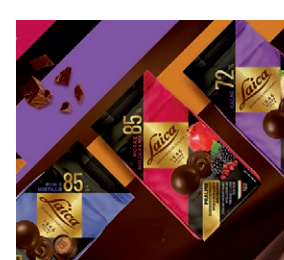
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FONDENTE
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32 GR - 4 DRAGÉES
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HAZELNUT
CREATIONS PRODUCT
RANGE
(CORNET 165 GR,
GIFT BOX 160 GR,
SPREAD 200 G.R)

one
bite
at a
time

WHAT IS GOING ON IN THE UK

According to a sector report published by The Grocery, Chocolate brands may feel positively about their business in the UK, since the main challenge this year has been getting enough supply to the retailers. Take-home sales, according to Kantar data (12 w/e 12 July 2020) have surged by more than a quarter since lockdown, equating to an extra 133.2 million pounds. Yet, the industry is now facing great pressures of a recession, also due to the new government strategy to lower obesity rates in the country. This includes a ban on TV and online adverts for food high in fat, sugar, and salt (HFSS) before 9pm. As well as a ban on the sale of HFSS products by volume (such as buy one get one

free deals) and location (such as at end of aisles or at checkouts). Concerns around nutrition, diet and health have been reshaping the entire food and drink world. But what it means to be 'healthier' is changing too: there is a growing number of plant-based offerings which often actually contain more sugar than standard chocolate, but are perceived to have wider environmental benefits. Yet, vegan chocolate - which at the moment can cost up to three times its classic milk chocolate counterpart - faces

competition from a chocolate that tends to be naturally dairy-free: dark. Which is increasingly appreciated and sought after, especially by more mature consumers. From a production viewpoint, the problem with removing sugar from chocolate is similar to "removing alcohol from whisky", the report highlights. Sugar in chocolate has two purposes: there's sweetness but it is also a bulking agent: typically sugar is about 50% of its mass. And there isn't one product that can replicate both

of sugar's effects, at least with zero laxative effect. Portion control could be more effective in solving the problem, yet it leaves brands wide open to accusations of shrinkflation, given that in most cases smaller products result in higher prices by weight. And the temptation to shrinkflate will only grow - the report explains - as manufacturers face mounting cost pressures: both Ghana and the Ivory Coast (which together produce almost two thirds of the world's cocoa) have introduced a 'living income differential' tariff on exports, adding a premium of 400 pounds to the price of every tonne of cocoa, in a bid to lift farmers out of poverty.

To regain margins, many suppliers began selling direct to consumers when lockdown started in March and, for some, it has revolutionised their businesses. But it's not as simple as just running an online shop: brands need to give consumers an alternative to the block chocolate they can simply add to the basket when doing their shopping. They need a reason to take the time to go to their website directly and purchase. If brands do want to take the plunge in DTC, now is the right time to do so. Because we're fast approaching Christmas, which is the most crucial time for the confectionery category. A repeat of Easter would be very hard to stomach.

Battle of the bars: the winners and losers in chocolate



Source: Nielsen 16 w/e 8 August 2020

Chocs away: how chocolate sectors have grown since Covid



Source: Kantar 12 w/e 8 August 2020



CONFECTIONERY

let's spread it!

Sweet spreadable creams generate a yearly turnover of 250 million euro in Italy. Nielsen data show that, in the first months of 2020, sales volumes increased by 20%. In the months of May alone, sales value rose by 18.8%: twice as much as in 2019, exceeding 403 million euro.

According to another survey, conducted by Iri, spreads occupy 14th place in the rank of the product categories that have contributed most to the turnover of mass retailers, with 67 million euros in sales between mid-January and mid-May. Nutella, the world-famous Ferrero brand, deserves a special mention, since between March and April it entered the shopping carts of two million households (source: GfK Consumer Panel).

Competition, however, is getting fierce. As you can notice from the wide offer available on supermarket shelves. The classic, of course, is made with hazelnuts but in recent years many original spreads have been created, especially to meet the different tastes and needs of modern consumers, starting from the 'vegan' diet. Besides big brands, many small companies are now producing their own spread, often made with local, typical quality ingredients, thus entering the 'premium' market segment.

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OLIVA SPREADABLE CREAMS (250 GR)

GALUP
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GIANDUJA SPREAD WITH NO ADDED SUGARS (250 GR)

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TIRAMISÙ SPREAD (150 GR)

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MAJANI 1796
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FIAT CLASSIC SPREAD (240 GR)

NUTKAO
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ORGANIC SPREAD WITH COCOA AND HAZELNUTS (350 GR)

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ORGANIC COCOA AND ITALIAN HAZELNUTS SPREADABLE CREAM, WITH NO ADDED SUGAR (200 GR)

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9
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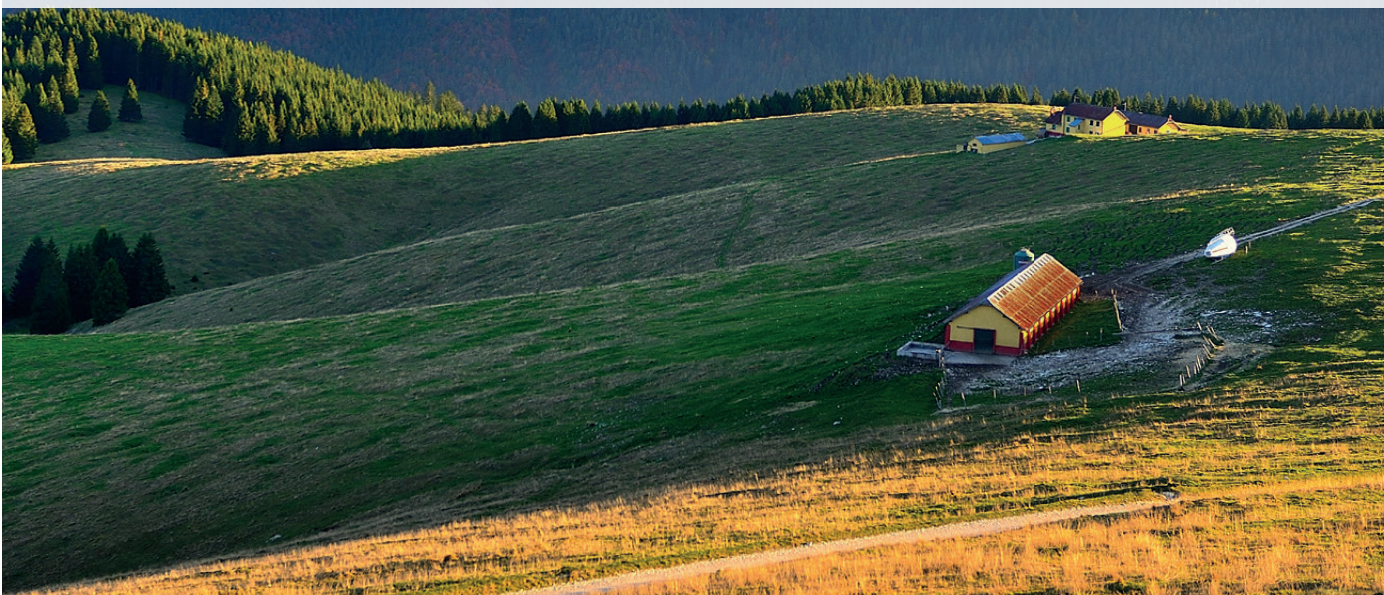
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R&D

Environmental Passport, please

The European project aims to promote the design and marketing of sustainable and environmentally friendly food products. A value for the competitiveness of all the companies of Montagna Vicentina.



WHAT IS THE ENVIRONMENTAL FOOTPRINT OF A PRODUCT?

As mentioned before, every product we consume, throughout its life cycle, generates one or more impacts on the environment. The measure that represents the nature and severity of these impacts is also known as the 'environmental footprint'. This measure can be represented by a single measure or more often by several measures each of which quantifies the impacts related to a particular environmental problem such as the consumption of non-renewable resources, the pollution of water bodies and air, up to the serious climate change affecting our planet.

HOW CAN IT BE IMPROVED?

Through eco-design paths that, thanks to the application of the scientific methodology of Life Cycle Assessment (LCA) according to the reference ISO standards, allow to identify the environmental impacts of a product and to give indications on how to reduce them.

WHAT IS THE ENVIRONMENTAL PASSPORT OF A PRODUCT?

The Environmental Passport of a product constitutes an environmental declaration developed according to the reference ISO standards (ISO 14040, ISO 14044, ISO 14025) and the rules by product category of the countries where it is marketed. The Environmental Passport is therefore the document that highlights not only the characteristics of quality and excellence but also the improvements in the environmental footprint of a product.



Il passaporto ambientale

Un progetto europeo che si pone l'obiettivo di favorire la progettazione e la commercializzazione di prodotti agroalimentari sostenibili e rispettosi dell'ambiente. È il 'passaporto ambientale' per i prodotti agroalimentari della montagna vicentina, ideato dal Dipartimento di Ingegneria Industriale dell'Università di Padova e finanziato grazie ai fondi del Programma di sviluppo locale del Gal Montagna Vicentina. Sette le aziende coinvolte, ognuna delle quali rappresenta una produzione del territorio e si è impegnata a sviluppare sette nuovi prodotti agroalimentari a ridotto impatto ambientale.

Every product we consume, during its life cycle, actually generates one or more impacts on the environment. The measure that represents the nature and severity of these impacts is also known as the environmental footprint. We can improve the environmental footprint of a product through eco-design paths that, thanks to the application of the scientific methodology of Life Cycle Assessment (LCA) according to the reference ISO standards, allow us to identify the environmental impacts of a product and to give indications on how to reduce them. Thanks to the commitment of researchers at Cesqa (Centre for Environmental Quality Studies), the Department of Industrial Engineering of the University of Padua and the results achieved in terms of environmental management of products and processes, it has been possible to develop the 'Environmental Passport' model and thus collect the interest of several companies sensitive to environmental issues. The project is also supported by the Local Action Group (LAG), a group composed of representatives of local socio-economic interests, both public and private, which meet in partnership with the aim of developing and implementing local development strategies of a participatory type aimed at promoting the economic and social growth of a territory.

The project

The project 'Environmental Passport for the Agro-food products of the Vicenza Mountains' responds to the need to stimulate local development in the areas of the GAL Montagna Vicentina through the enhancement of national and international competitiveness of the agricultural and agro-food companies that operate there. The project aims to contribute to the eco-design of seven production systems characteristic of the territory of the Montagna Vicentina (agricultural and processing companies) and to certify the improvement of the environmental footprint also in relation to the Made Green In Italy regulation (law 221/2015). The production systems of the partner companies will be initially analyzed in relation to the markets in which they operate and the life cycle (Lca) of the processes that intervene (from the extraction of raw materials to the management at the end of life). This study will identify possible areas for improvement in order to obtain products with a better environmental footprint. In order to be certified, the results obtained will then be subject to third-party verification.

The context

The attention of the international community towards environmental issues



and in particular in relation to the consequences and effects of climate change is concretely influencing the circulation and market of agri-food products in Europe and worldwide. On the one hand, the consumer is increasingly sensitive to environmental issues, so much so that greater attention is being paid to products with reduced environmental impact. On the other hand, a growing number of institutional initiatives, precisely to guarantee the consumer, intend to define common rules for product categories to quantify environmental performance. It is in this context that the 'Environmental Passport' project is inserted. Thanks to it, it will develop environmental declarations of agricultural products able to respond in a transversal way to the different rules of the markets, thus certifying the improvement of the environmental footprint.

The main goals

The application of the project de-

veloped by CESQA of the Industrial Engineering Department of the University of Padua responds to the need to transfer an environmental quality regime to local supply chains and production systems and therefore the added value of the resulting products. To do this, the project intervenes in particular on the themes of resource saving, the fight against climate change and environmental protection.

The companies involved

There are currently seven companies that actively participate in the project and that have made themselves available for the pilot application of the 'Environmental Passport' model: Rigoni di Asiago, Società Agricola Maculan, Società Colline di Marostica, Latteria di Soligo, Gruppo Bianchi, Caseificio Pennar Asiago, Agri-birrifico Lunardon Michele. Each one of them is located in the territory of the Montagna Vicentina and with its

activity tells some of the most representative productions of the territory. Each company, thanks to the contribution of researchers from the DII of the University of Padua, has had two years to design and evaluate a new product with reduced environmental impact according to international standards. The project, started in October 2018, reached an important milestone in April 2020, when all the companies participating in the project successfully completed the third-party verification of CSQA Certifications that recognizes the path of study of new products with reduced environmental impact. The certification, which assesses the compliance with ISO 14040 and 44 standards for life cycle analysis, refers to the research conducted by CESQA of the DII which had as its objective the analysis of potential environmental impacts of the production systems under examination and the evaluation of possible

technological and management solutions to reduce these impacts. Several solutions have been identified, ranging from a format change in the case of Rigoni di Asiago fruit juices, to an improvement of the breeding and cultivation methods in the case of Gruppo Bianchi, Caseificio Pennar Asiago, Colline di Marostica, Latteria di Soligo and Lunardon Michele, up to the selection of new high resistant vines in the case of Maculan. Professor Scipioni, coordinator of the group that conceived the project, commented on the results obtained as follows: "The research that we have carried out has allowed us to identify solutions to create food products with a reduced footprint; the real value lies in the path taken by the seven companies that have developed an awareness that will allow them to market the new products and thus contribute to a more sustainable production and consumption".

Marco is
our influencer.

When it comes to Parmigiano Reggiano PDO, we listen to Marco, cheesemaker for over thirty years in Busseto. Agriform is a cooperative company partnering with some of the top dairies in Northeastern Italy; we oversee every step in the production process to ensure our highest quality cheeses.



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FOCUS ON

Right where Trentingrana is born (again)



A day in Val di Fiemme, among the mountains where Concast cheeses are produced. The new packaging and the 30 month seasoned products. And all the passion for the dairy art.

Sometimes too many words are redundant to describe dairymen's passion for their work, which is a true art. They are silent people, used to the harshness of mountain life. Their actions and gestures tell us a real love story for valleys and milk processing. Their ability to recognize the quality of the curd, only by touching it, is amazing. Their knowledge of each cow in the barn is stunning. Just as admirable is their will to wake up before sunrise for 'desmonte-gada', a dialect word which indicates the moment when mountain cows come back from the pastures. We were lucky enough to have a short tasting of the cheesemaker's life on Saturday 12 September, in Val di Fiemme, near Cavalese (Tn). It's right there that Trentingrana is born.

The alarm clock rings early, because milk is processed very early in the morning, following the rhythm of nature. The day is wonderful, the sun is rising in the sky, and the mountain air is crisp. We are going to the Caseificio sociale Val di Fiemme di Cavalese, where we will witness the daily production of Trentingrana. This is only the first of a series of experiences that, during the day, will take us to Malga Juribello, near Passo Rolle, which is one of the pastures where cows spend the summer. There we will taste the 30 months Trentingrana, and discover the new look for the entire line of Trentingrana products. A novelty which marks an authentic rebirth for the consortium.

The 30 month Trentingrana

There's a sense of expectation in the air. At Malga Juribello cheesemakers, breeders, managers, and personalities of provincial associations and institutions are eager to taste the new 30 month Trentingrana. The opening of the cheese wheel starts the tasting, led by a food technologist, who explains the organoleptic features of the product, which encom-

passes all the taste and the quality of the mountain milk.

The long seasoning makes the taste of this cheese rich and complex, but at the same time well balanced. It releases sweet, nearly floral tones. Its milk, in fact, is produced by cows that feed exclusively on hay, fodder and non-GMO feed, without silage. Not surprisingly, this PDO boasts the Qualità Trentino brand, which certifies the origin of this cheese. Moreover, the entire supply chain is completely traceable, and subject to rigorous controls.

This is a niche product: only a few, well selected wheels can reach this level of maturation. In 2020, approximately 2,500 wheels are expected out of the total of about 100 thousand brought by the associated dairies. The goal for the next five years, however, is to reach 5 thousand wheels per year.

A new look that talks about the mountains

While we are tasting different kinds of cheese – puzzone di Moena PDO, vezzena del Trentino, primiero fresco – the new Trentingrana packaging is revealed. They couldn't choose a better location than Malga Juribello for this event: the Trentino mountains, in fact, have the lead role in the new look of Trentingrana and Formaggi Tradizionali line.

Dove rinasce Trentingrana

Una giornata in Val di Fiemme, tra le montagne dove sono prodotti i formaggi di Concast. L'evento a Malga Jurabello, nei pressi di Passo Rolle, ha riunito casari, allevatori, dirigenti e personalità delle associazioni e istituzioni provinciali, che hanno potuto degustare in anteprima il nuovo Trentingrana 30 mesi. La Dop può fregiarsi del marchio Qualità Trentino, che sancisce l'origine e la territorialità del formaggio. Un prodotto di nicchia: solo poche forme selezionate possono raggiungere questo livello di stagionatura. Per il 2020 sono previste approssimativamente 2.500 forme sul totale delle circa 100mila conferite dai caseifici associati. L'obiettivo per i prossimi cinque anni, però, è raggiungere le 5mila forme annue. Le montagne trentine, insieme ai colori oro e nero, sono le protagoniste del nuovo packaging della linea Linea Trentingrana e dei Formaggi Tradizionali. Invece, le referenze con stagionatura 18-24 mesi, le più vendute, saranno identificate dal colore arancione.

"At last, after so many years, we managed to renew the packaging of our products", Anna Rizzi, marketing director of Gruppo formaggi del Trentino, explains with satisfaction. "We tried to convey the idea of the territory, the origin, and the naturalness of this product in the most effective way, using colours and claims on packagings. We know that more than ever, during the pandemic crisis, Italian quality and naturalness are sought-for features!"

Besides the mountains, the new packagings feature different colour codes, that convey a specific and functional brand identity for distribution, and that are easily recognizable by the consumers. The new coordinated packaging is the result of a neuro-marketing research, aimed at determining a modern wrapping that could be close to the emotional sphere of the consumer. Black and gold, therefore, are the colours of the 30 month Trentingrana packaging and of the excellence products of the Traditional line: they were chosen to highlight products prestige. On the other hand, the best-selling references aged 18-24 months are identified by the orange colour.

The event and the day come to an end. Satisfaction takes the place of impatience. And we enjoy a walk among the mountains, the true guardians of the Trentino dairy tradition.

SCEGLI IL Re

Gourmet Salami

Renzini expands the range of salami dedicated to the self-service with 3 new gourmet recipes, with an unmistakable taste and an exclusive look! Try them all!

Pistacchio
Salami with chopped pistachios cover

Nocciolo
Salami with chopped hazelnut cover

Sottobosco
Wild boar salami with red berries cover



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FOCUS ON

HOW IS TRENTINGRANA BORN?

Alberto is our guide during our visit at the Val di Fiemme social dairy, where we witness the birth of Trentingrana. Even if it is protected by Grana Padano Consortium, the production of this PDO is regulated by separate rules. The processing times are quick and strictly timed, but dairymen move between the boilers as in a traditional dance.



The whole milk from the morning milking and the skimmed milk from the previous evening milking are combined in the copper boiler, and then left to rest and surface naturally. In each boiler 900 litres of milk are processed, from which two twin forms are obtained.



The whey, obtained from the previous day's processing, is added to the milk, together with calf rennet. They are mixed with a stirrer at a temperature of 32.6° for 20 seconds. The liquid is then left to rest for 10 minutes.



With the dowelling process, the curd is 'broken' into granules as large as grains of rice. The cheesemaker then makes a tactile and visual analysis to evaluate the elasticity and consistency of the clots. This phase should not last more than two minutes.



The curd is steamed at a temperature of about 54-55° for eight minutes. Gradually, while the dough is drying, the curd settles on the bottom of the boiler, where the mass is left to rest under the whey for an hour.



The mass is extracted from the boiler using linen sheets.



From this mass, the cheesemaker cuts by hand two twin wheels, which are set in Teflon plates.



For the first 24 hours, the wheels are left on a slightly inclined table, in a hot chamber at 30°-32°, until the whey is drained. During this period, they are turned upside down three times. On the evening of the same day of production, the linen cloth that wraps the wheels is removed and, a label band inserted on the side.



After 24 hours, the wheels are moved to metal plates and immersed in a brine of water and salt for 20 days.



The wheels are left to dry for 24 hours, then they are moved to the ripening cellars where, every two months, an expert beater from the Consortium evaluates each one of them to determine its future.



The first selection of the wheels takes place after 6-7 months. The best ones continue their seasoning in Val di Non. The imperfect ones are assigned a score (0,1,2) according to the defects they present. Before being put on sale, the forms are evaluated again. If they are fulfil all the requirements, they are marked. The defective ones, instead, are sold as Giovane del Trentino.

TRENTINGRANA-CONCAST AND GRUPPO FORMAGGI DEL TRENTINO

The Val di Fiemme social dairy is one of the 17 associated with the Trentino social dairy Consortium (Trentingrana-Concast). These associated are located exclusively inside the Autonomous Province of Trento, and count 700 local breeders and milk producers. The presidents of the 17 dairies sit on the Consortium board. Gruppo formaggi del Trentino, on the other hand, is the commercial soul of the Consortium, and deals with all the sell and marketing activities of the Trentingrana line, which includes Trentingrana and Trentino butter, in addition to the traditional cheese line, or rather all the excellence products of Trentino valleys.

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WEB

Us: new rules for e-commerce

Us retailers are supporting a law that obliges online marketplaces to publish the data of third-party suppliers. The aim is to fight the online sales of stolen, counterfeit or harmful products.

All for one, one for all. Many Us associations have teamed up to support a new bill called 'Inform consumers act', or better 'Integrity, notification and fairness in online retail marketplaces for consumers act'. A proposal to make e-commerce distribution in the Us more monitored, transparent and fairer, fighting the online sales of stolen, counterfeit or dangerous goods.

The bill - presented to Congress in March by the senators Bill Cassidy, Dick Durbin and David Perdue - forces online retailers to annually request and verify the profiles of 'high-volume third party sellers', i.e., those third party sellers or suppliers who have made 200 or more sales in a 12-month period for an amount of 5,000 dollars or more.

In particular, these business partners must provide the marketplace with information about their bank account; an identity document with a photo of the person representing the third-party seller; a document proving individual or corporate contact; and a corporate tax identification number. Moreover, the full name of the seller; the business address; whether the seller produces, imports, sells or resells consumer products; and the contact information, including a telephone number and a business email address, must also be clearly visible to consumers. There should also be an evident message encouraging buyers to report suspicious activity, through a clear contact.

The legislation was introduced in the United States House of Representatives on 23rd July by Congressman Jan Schakowsky, president of the Sub-

committee on Manufacturing, Trade, and Consumer Protection, who stated: "As online markets attract more and more users because of pandemic, it is vital that consumers know who they are buying from. This bill makes sense, it is a practical solution that I hope will be passed quickly".

While waiting for its legislative process to continue, the document has received the praise of many retailers in recent months. The reason is not difficult to imagine. In fact, e-commerce is also advancing in the American market and more and more shops and chains are finding themselves forced to shutter. This initiative aims to promote responsible market behaviour, discourage unfair selling practices, protect consumers and balance the level of transparency between physical and online retailers, as well as deter criminal organizations from stealing items from physical shops and then reselling them wholesale online.

"Retailers pay attention to ensuring that the products on their shelves come from responsible sourcing and meet security standards. Third-party marketplaces must take similar precautions to eliminate counterfeit and stolen goods from their platforms," says Jessica Elliott, executive director of the Louisiana Retailers Association.

Alex Gourlay, president of the Us pharmaceutical giant Walgreens, also expressed his support: "The lack of transparency and accountability in today's digital markets has contributed to the rapid rise in organized crime in retail, which has become a major challenge".

Usa: nuove regole per l'e-commerce

Numerosi retailer americani si sono schierati in favore di un nuovo disegno di legge, denominato 'Inform consumers act', per esteso 'Integrity, notification and fairness in online retail marketplaces for consumers act'. Una proposta per rendere più monitorata, trasparente e corretta la distribuzione e-commerce negli Usa, contrastando la vendita in rete di beni rubati, contraffatti o pericolosi. Il disegno di legge, presentato a marzo al Congresso dai senatori Bill Cassidy, Dick Durbin e David Perdue, impone ai rivenditori online di richiedere e verificare annualmente i profili degli 'high-volume third party seller', ossia, di quei venditori terzi o fornitori che hanno effettuato 200 o più vendite in un periodo di 12 mesi per un importo di 5mila dollari o più.

SUPPORTERS OF THE BILL

Household & Commercial Products Association, merges companies that produce goods for cleaning, protection, maintenance and disinfection of homes and workplaces.

Public Interest Research Group, the public interest research group of the United States.

Public Citizen, a non-profit organization for the defense of consumer rights.

Retail Industry Leaders Association, which gathers retailers such as Walmart, Costco, Macy's, Lidl, Delhaize America, Walgreens, GameStop, and Ulta Beauty.

Louisiana Retailers Association, which has over 2,000 members throughout the State, representing over 4,000 shops.

Toy Association, the American trade association for the toy industry, which has over 950 members.

Tic Council, an international association which represents independent testing, inspection and certification companies.

Juvenile Products Manufacturers Association, a national trade organization representing manufacturers of products for children.

Halloween & Costume Association: a commercial organization representing companies involved in production, import or distribution of Halloween products, including costumes, decorations, novelty and party items.

Home Depot: retailer of home care products.



Amazon, no more a 'showcase'

The California Courts of Appeal states that the liability for a faulty product purchased from a third party falls also on the e-commerce giant. And the principles that led to this ruling could become applicable in Italy too.

Amazon, which during pandemic has managed to increase third-party sales by 53% through its marketplace, has been now charged by the California Courts of Appeal with being responsible for defective or unsafe products on its platform, and for the injuries caused by them. It was sentenced in response to a lawsuit filed by Angela Bolger, who bought a replacement battery for her laptop on Amazon's marketplace, suffering third-degree burns when it caught fire.

Before this ruling, Amazon has always been legally considered as a 'service provider', a definition that has allowed it to avoid every kind of liability, fully charging it on third-party vendors who use the marketplace. However, as the Seattle giant supervises every stage of the retail experience, according to the sentence it cannot be considered as a mere 'showcase', but it must be held responsible for the products sold.

"Whatever the term used to describe Amazon, whether it is 'retailer', 'distributor' or simply 'facilitator', its role is crucial in bringing the product to the consumer," stated the Court of Appeal. "Under the principles of strict liability, Amazon should therefore be held responsible if a product sold through its website is found to be faulty".

Moreover, even though the sentence confirms the 'neutrality' of e-commerce operators, Amazon cannot rely on it. Because, while it is true that the operator of a platform cannot be responsible for every action of its users, when it becomes part of their business, it must take charge of both honors and burdens. According to the Us ruling, Amazon is to all intents and purposes a key link in the chain of the sales process linking the manufacturer to the consumer: it manages the communication with the customer, the product availability, logistics, delivery, payment and even warranty. It is therefore clear that its role goes far beyond simply providing a platform to a group of users (albeit very large), and this role entails precise duties.

However, the Californian law about liability differs from our Consumer Code, which maintains penalties only for sellers and manufacturers, and does not currently include the figure of any intermediaries. It remains to be seen, should a dispute of this kind arise in Italy as well, whether jurisprudence will choose to follow the Us model, interpreting the concept of 'seller' in a broad way, hence applying it to Amazon too. It is impossible, then, not to take into account the

sense of reliability that the end customer perceives during the purchase process on the e-commerce giant. "The products sold on Amazon's platform benefit from an 'implicit declaration of security' which makes the provision of strict liability applicable", states the Californian Court sentence.

In Italy, Davide Rossi, president of Optime, the observatory for the protection of the electronics market in our country, expressed his satisfaction with this memorable legal decision: "This sentence undermines the intangibility of Amazon, as well as of all similar platforms. We hope that this enlightened decision will pave the way for a rethink of the European e-commerce laws, which are now 20 years old and do not respond to current problems. Intervening in the relevant European bodies is now an essential step," continues Rossi, "not only to protect consumer rights, but also to tangibly guarantee fair competition between operators. However, we must not think that this means leaving things as they are until the new rules come into force: it is already possible to apply also in Italy and in Europe the same principles adopted by the Californian Court and we will fight in all the competent bodies to make this happen".

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RETAIL

Walmart challenges Amazon

The Plus subscription, launched on 15th September in the Us, costs 98 dollars per year, or 12.95 per month. And it offers free shipping, fuel discounts and new, faster and safer experiences in the shops.



Amazon now has a real competitor. Walmart Plus, the platform launched in the Us by the leading retailer company on last 15th September, includes a subscription that directly challenges Amazon Prime, offering in-store and online benefits to consumers, focusing on the aggressiveness of the offer. Subscribers will benefit from an unlimited number of free shipments from Walmart stores, in addition to significant cuts in fuel prices at all service stations that have joined the promotion. The membership of Walmart Plus costs 98 dollars per year or 12.95 per month, including fifteen days of free trial. The people who were already subscribers of the chain's Delivery Unlimited program will automatically be enrolled in Walmart Plus.

Walmart Plus was initially supposed to be launched during the spring, but due to Covid-19 pandemic its debut had to be postponed. The choice fell on mid-September in order to anticipate the Christmas shopping season, with its strong promotions. In 2019 Walmart had already launched the Grocery Unlimited program on 1,400 shops, but for the same price of 98 dollars now the service has been extended to include tech, beauty and sports products. The subscription to the direct competitor Amazon Prime costs instead 119 dollars a year, or 12.99 a month (here the prices are basically aligned).

At launch, Walmart Pay benefits include free shipping for about 160 thousand references, which include technological products, toys, household goods, food. The Scan & Go option in the app allows people to shop in stores by scanning the purchases and paying for them with Walmart Pay in touch-free mode, therefore in a safer and faster way than traditional checkout. Fuel discounts will instead involve over 2,000 petrol stations of Walmart, Murphy Us, Murphy Express and Sam's Club, and will help customers save around five cents per gallon (3.7 liters). Knowing this, it isn't a surprise that Amazon has recently announced the addition of Prime Gaming to its list of digital benefits. The service, which is only available for Prime members, is essentially similar to Twitch Prime, but the new name means that it is identified as an exclusive benefit for Prime members, generating a perception of added value.

At the beginning of 2020, Jeff Bezos stated that there are over 150 million Prime subscribers global-

Walmart all'attacco di Amazon

Il servizio Plus, lanciato il 15 settembre negli Usa, costa 98 dollari l'anno, o 12,95 al mese. E offre spedizioni gratuite, sconti carburante e nuove esperienze di shopping, più veloci e sicure, nei punti vendita.

ly. Today, Amazon accounts for approximately 38% of all online retail sales in the United States. According to eMarketer, Walmart is in second place, with just over 5%. Walmart Plus therefore aims primarily to nibble away some of its rival's market share.

The challenge between the two giants dates back to 2015, when Walmart launched ShippingPass, an unlimited online shipping service that costs 50 dollars a year, with deliveries within three days. Amazon Prime at the time costed 99 dollars a year. Two years later, Walmart lowered the subscription fee and switched to a two-day free shipping program for orders of 35 dollars or more. In 2016, it purchased Jet.com for three billion dollars. But the investment didn't work, and a month ago the portal was permanently closed. In 2019, both players equipped themselves to guarantee one-day shipping, and recently Walmart announced express delivery in two hours for an addition of 10 dollars on its prices. Even during Black Friday Walmart tried to obscure Amazon, which came up with very aggressive offers in response. Only time, however, will tell whether the leader of the large-scale retailer has the firepower to beat the e-commerce giant. It is certain, instead that the American system, with a high level of service for a subscription, could become a model for Italian chains too.

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TREND



Healthy foods: the attractiveness increases

According to the Tuttofood report, the trend is engaging Millennials and Generation Z. Looking for products rich in taste that are nutritious and wholesome for the body.

Consumers' attention for foods and drinks is constantly growing. They are more mindful of what they place on their table. In particular, they take heed of ingredients present in the foodstuffs they consume every day. Food allergies and intolerances or special dietary concerns are increasingly the center of attention. Also the interest in the health, safety and quality of products increases the speed of growth in sales of organic goods. Therefore, shopping trends are in line with consumers' desire to eat well and in a healthy way, preferring the so-called 'healthy foods'. This tendency has been also recorded by the report about the future of food 2020 created by Tuttofood (the exhibition that represents the meeting point between Italian agri-food and Food & Beverage realities from all over the world), which reveals a young world more and more conscious of what it eats. In re-

Healthy food: aumenta l'interesse per i cibi salutari

Il report di Tuttofood rivela una crescita del trend del benessere alimentare. Che coinvolge soprattutto Millennial e Generazione Z. Attenti a proposte ricche di gusto, ma nutrienti e sane per l'organismo. Allergie, intolleranze o semplicemente accortezze alimentari sono sempre più al centro della scena. E l'interesse per la salute, la sicurezza e la qualità dei prodotti incrementa la velocità di crescita delle vendite di referenze biologiche. I consumi e i trend del carrello, dunque, sono sempre più in linea con la voglia dei consumatori di mangiare bene e in modo sano, prediligendo i prodotti salutistici, i cosiddetti 'healthy foods'.

lation with the changing habits of consumers worldwide, this survey is the result of the re-elaboration of the report created by The Fool, which consider the data of the study carried out by GlobalWebIndex. Every year it interviews over 688 thousand internet users aged 16-64 through online questionnaires. According to the survey conducted on a global sample of 145,271 interviewed from 46 countries, the attention to the self welfare has become a priority: the monthly use of health fintess applications from 11% in 2012 has grown to 27% in 2019. It was found that Millennials (people between 23 and 36 years old) and Generation Z (between 16 and 22 years old) are more likely to buy healthy food than frozen or ready-made food. The data collected by GlobalWebIndex in 2019 in the United Kingdom and United States also show that 35% of the internet users interviewed want to start eating healthier. The organic goods are making their way in this panorama.

Millennials and Generation Z at the forefront

According to the study, the demand for organic products is growing stronger, especially among Generation Z and Millennials. In fact, young consumers are at the forefront for a 'health-conscious' lifestyle. According to by data, the number of people who say they want to buy natural and organic products has grown by nine and five percentage points, respectively, between these two groups of consumers. Even if the high price of some of these goods often has a significant impact on purchases. About a third of Generation Z and Millennials say they use to buy healthy food every month. Baby Boomers instead (those aged between 56 and 64) account for only a quarter. Comparing this data with that of purchases of frozen food and ready-to-eat food, it is possible to observe how, even if marginally, healthy foods are purchased more by younger consumers.

Fast food and the healthy challenge

Eating well and in a healthy way, therefore, is much more than a fleeting trend. The global fast food market has had to deal with the growing consumer demand for healthy foods. While much has been done in this direction, the number of people who hang out or buy from fast food chains has decreased. In particular, pizza brands are affected by this drop in demand, despite the growing competition in the market from those who provide delivery services or healthy alternatives. For example, McDonald's and Kfc, two of the biggest companies in the sector, have registered a decrease in visits and purchases since the beginning of 2017. This attitude sets off a series of promotional campaigns aimed at health food area and also at the inclusion on menus of plant-based meat alternatives.

Identikit of the consumer

The Tuttofood report also defined an identikit of the typical organic food consumer: internet users interested in healthy foods or drinks, who have bought or searched for organic goods online and who strongly agree with the statement "I try to buy natural organic products". 55% of these 'health foodies' use social media to research products, although Tv spots remain the most popular vector, especially for discovering new brands.

The healthier countries

The research also revealed that Philippines, followed by Colombia, Mexico, South Africa and Turkey are countries with a high level of attention to their well-being. Also in this case the main consumers of healthy and natural food are represented by Millennials. In brief, in the world of food trends are constantly evolving: at this moment the food industry is in the age of health. To keep up with times and be able to make attractive proposals adhering to new food trends, companies and restaurants must pay attention to market demands. Obviously, riding the wave of healthy food.

AN EXPLOSION OF FLAVORS

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THE EVENT

Tuttofood 2021: business re-starts from Milan

More international, more digital.
Preparation work has started
for the next edition of the food & beverage
trade show, to be held in May 17-20.



Time has come to look ahead, to 2021, that according to some optimistic forecasts could lead to a first recovery in global trade. In a world characterized by a 'new normality' and with a totally renewed value system for the food & beverage supply chain – from healthy to sustainability and animal welfare. In order to stay competitive in such a fast-changing market, companies are asked to implement new business models and develop original ideas in terms of product launches, services and channels. For the food & beverage industry, Tuttofood 2021, scheduled for May 17-20, 2021 at Fiera Milano, will be a strategic event to discover in preview the latest trends and meet the industry's stakeholders.

A global hub for the industry

Tuttofood's role as a global meeting hub is growing, also through initiatives aimed at strengthening the network of direct relationships: besides the scouting activity

to increase the presence of buyers from strategic areas like Singapore, Japan, the US and Europe (United Kingdom, Germany, France, Spain and the Netherlands), it is ready to welcome international bloggers, influencer and trend setters. Organizers are also enhancing the participation of market operators from Canada and The Middle East, by starting relationships with local associations and Chambers of commerce. A growing internationalisation that is also confirmed among the exhibitors. To date, more than 550 names are already confirmed from countries including Belgium, Germany, Greece, Ireland, The Netherlands, Peru, Portugal, Romania, Spain, the United States, Switzerland and Taiwan, as well as Italy.

Fiera Milano Platform is born

Digital transformation will play a central role at Tuttofood 2021. Fiera Milano Platform is the new platform dedicated to the entire supply chains community, catering

Tuttofood 2021: il business riparte da Milano

È il momento di guardare al futuro. Al 2021 che potrebbe portare, secondo le previsioni più ottimistiche, a un primo 'rimbalzo' dell'economia e del commercio internazionale. In un mondo tuttavia immerso in una nuova normalità e con un rinnovato sistema di valori che, per l'agroalimentare, si declinano nella ricerca di prodotti naturali e salutistici, oltre che attenti al benessere animale. Per restare competitive in questo scenario in continua evoluzione, alle aziende viene richiesto di implementare nuovi modelli di business e ideare strategie innovative in termini di prodotti, contenuto di servizio, canali e mercati. Tuttofood 2021, a Fieramilano dal 17 al 20 maggio, sarà un appuntamento chiave per scoprire in anteprima gli ultimi trend e incontrare gli stakeholder del comparto.

to exhibitors, visitors, buyers, journalists, bloggers and opinion leaders. An innovative, integrated system which will focus even more on the network revolving around each exhibition, and simplify interactions between buyers and companies. The event becomes 'phigital', or hybrid, with the creation of new formats that are simultaneously digital and accessible to a live audience. Among the structural interventions carried out inside the exhibition centre, with the use of multiple touch points based on new technologies (IoT, Data analytics, Cloud, Mobile App), Fiera Milano has implemented a series of tools that include: an infrastructure consisting of 80 high-resolution Led walls, which can be adapted to a wide variety of infotainment types; a heatmap to allow geolocation within the exhibition centre; a map monitoring flows and routes in the halls for better interaction between buyers and exhibitors, and a new exhibition centre app with services



TUTTOFOOD 2019

3079
BRANDS

{ 16% }
INTERNATIONAL

82,551
PROFESSIONAL
VISITORS

{ 23% }
INTERNATIONAL



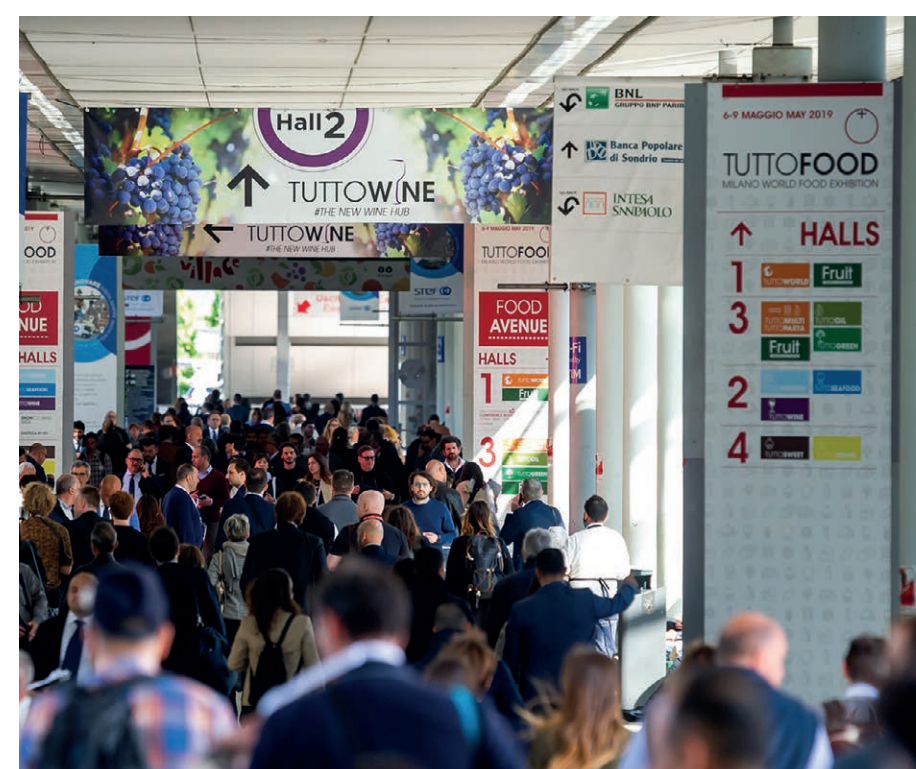
including the new way-finding system, fast track, reservations for parking and food service.

The synergy with Meat-Tech

The 2021 edition means further, unparalleled added value, by simultaneously running the third edition of Meat-Tech, the Ipack-Ima exhibition dedicated to processing and packaging solutions for the meat, meat products and ready meal industry. A unique project on the European scenario that integrates the exhibition offer of the meat, seafood and dairy supply chains, historic Tuttofood sectors, with the best of processing and packaging technologies and solutions. Further strengthening the supply chain logic that has long characterised Tuttofood, this contemporaneity will increase the opportunities for networking and business for both Tuttofood exhibitors, who are also processing and packaging technology customers, and the operators in attendance at Meat-Tech.

THE SECTORS OF TUTTOFOOD 2021

TUTTOFROZEN
TUTTOSEAFOOD
TUTTOPASTA
TUTTOGROCERY
TUTTOOIL
TUTTODAIRY
TUTTOMEAT
TUTTOHEALTH
TUTTOFRUIT
TUTTODRINK
TUTTOSWEET
TUTTO WINE
TUTTDIGITAL
TUTTOWORLD





ZOOM

The market insights by Tuttofood



GLOBAL F&B TURNOVER IS SET TO DOUBLE BY 2024

In such a particular year, research centres and analysts have been forced to review their forecasts again and again. The Organisation for Economic Co-operation and Development (Oecd) estimates that during the second quadrimester the GDP of member countries dropped by an average of 9.8%. Italy is performing slightly worse than average, with Istat confirming a drop of 12.8%. France is doing worse, at -13.8%, as well as the UK, where figures have fallen by more than 20%. The Usa fares a little better, at -9.5%, while Japan records a -7.8%. The Eurozone average is -12.1%, while for the EU as a whole it is -11.7%. Overall, the drop equates to 10.9% across OECD countries.

F&B fares better than the economy as a whole

According to the average forecasts of various analysts as calculated by specialist website Statista, and updated as of August 2020 to take the impact of Covid-19 into account, on a global level the food & beverage sector should close 2020 with a turnover in excess of 236.5 billion dollars, significantly higher than the 155.5 billion of 2019 (+52.1%) Following on from this peak, the growth will continue in coming years, with the sector set for a 15.4% rise next year, reaching 272.9 billion, followed by a 12.4% growth in 2022 (for an overall figure of 306.7 billion) and an 8.8% increase in 2023 (equating to 333.8 billion). Looking ahead to 2024, the global f&b market value will be more than double, with a further increase of 6.3% contributing to what is set to be a record figure of 354.76 billion dollars. This year, the five main f&b markets will be, in order, China with 152.44 billion dollars, followed by Japan that records 19.11 billion, the Usa with 15.40 billion, the UK with 8.5 and finally South Korea that will approach 7.74 billion dollars.

The reasons of the growth

This growth is the result of various factors. Firstly, the consumer base is widening. There are roughly 650 million consumers today (equating to less than 1 in 10 of the Earth's inhabitants, or 8.5%), but this figure will rise to more than 1.76 billion in 2024, with a penetration rate of 22.8%, or more than 1 in 5. Essentially, for every family unit anywhere in the world there will be at least one person who shops. But there is also an increase in average spending, which has gone from 177.50 dollars per person per year in 2019 to 227 dollars this year. With some adjustments, this figure is set to remain above 200 dollars per head until 2024. It is interesting to note that on-line sales will continue to have strong potential for growth, lying at just 2% today and expected to be still at only 3% in 2023. Finally a look at consumers, with more than a third (34%) aged between 25 and 34, 25% between 35 and 44, and 20% between 18 and 24.

PRODUCTS SYMBOLIC OF MADE IN ITALY ARE STILL ON THE RISE

The growth in food spending does not stop in Italy: according to the Ismea-Nielsen panel, the first half of this year recorded a 9.2% increase in value in food and drink purchases compared to 2019, the highest increase of the last 10 years. A boom where groceries take the lion's share, as confirmed by the data - in this case that of IRI - of large-scale retail trade between January and July of this year. Out of almost 30 billion euros of total expenditure for packaged food, the multiproduct has grabbed over 12 billion with an increase of 7%. In terms of growth, however, with a +10% increase pasta did better, reaching a spend of 664 million euros. Some of the reasons are highlighted by Giuseppe Di Martino, CEO of Pastificio Di Martino. "We noticed that the emergency has accelerated many trends that were hinted at before. For example, e-commerce was already a strong point for us and today we are developing it even further. All the issues related to sustainability, traceability and, of course, safety are also growing. Fields in which we had already worked extensively, for example by innovating our packaging. In addition, the emergency made us feel that we need to put the person, the customer in the case of business, at the centre of our operation".

Product innovation paves the way for growth

Product innovation represents a strategic growth accelerator. "Since 2019 we have defined the way forward, interpreting our raw materials in products with a high service rate," said Matteo Merlin, Pedon Marketing Director. "This is how the latest highly innovative launches 'I Pronti' and 'I Legumi Fatti A Snack' were born, because they change the perception of legumes and define new ways of consuming them, opening up to



a much wider and more varied audience. Sustainability is another strategic asset, which we formalised by defining precise guidelines in a three-year plan. Among these, the use of completely recyclable film by 2022 and the use of Carta Crush Fagiolo - derived from bean waste with a view to a circular economy - for products in cartons." In difficult times, recreational foods are also good. And in fact, from January to July dessert figures are positive, according to IRI: sweet spreads have grown in double figures - up by 13.7% - reaching half a billion in value (491 million euros) while sweet snacks, although slightly down, are still worth almost a billion (960 million). Even in this sector, however, the secret to growth is innovation and attention to new sensibilities. "The market requires above all packaging sustainability, therefore new materials that also involve new suppliers", says Barbara Orofalo, Marketing & Sales Manager of Majani 1796. "Consumer demands, more than the product, concern the service, which we are developing. To stay in the market you need to be original, quick and complete in your offer. At the moment the overseas market represents about 4% and, as in Italy, we have realized that business customers are increasingly organizing themselves with e-commerce platforms".

FOODS OF ANIMAL ORIGIN TO THE (INTERNATIONAL) CHALLENGE OF SUSTAINABILITY

Meat and cheese are among the food sectors with a more developed international dimension. Yet today they have to face new challenges, like a renewed attention to animal welfare, controversy over the carbon footprint of intensive farming and a general demand for greater sustainability and safety. According to GFK-Eurisko data, the average Italian consumer eats something like 23 kg of cheese per year. The consumption of mozzarella is growing among fresh cheeses (+65%), followed by Grana (59% of preferences), yoghurt (50%) and mature cheeses (for 42% of preferences). Over 18 regular consumers of fresh cheeses and dairy products are estimated at 31.5 million.

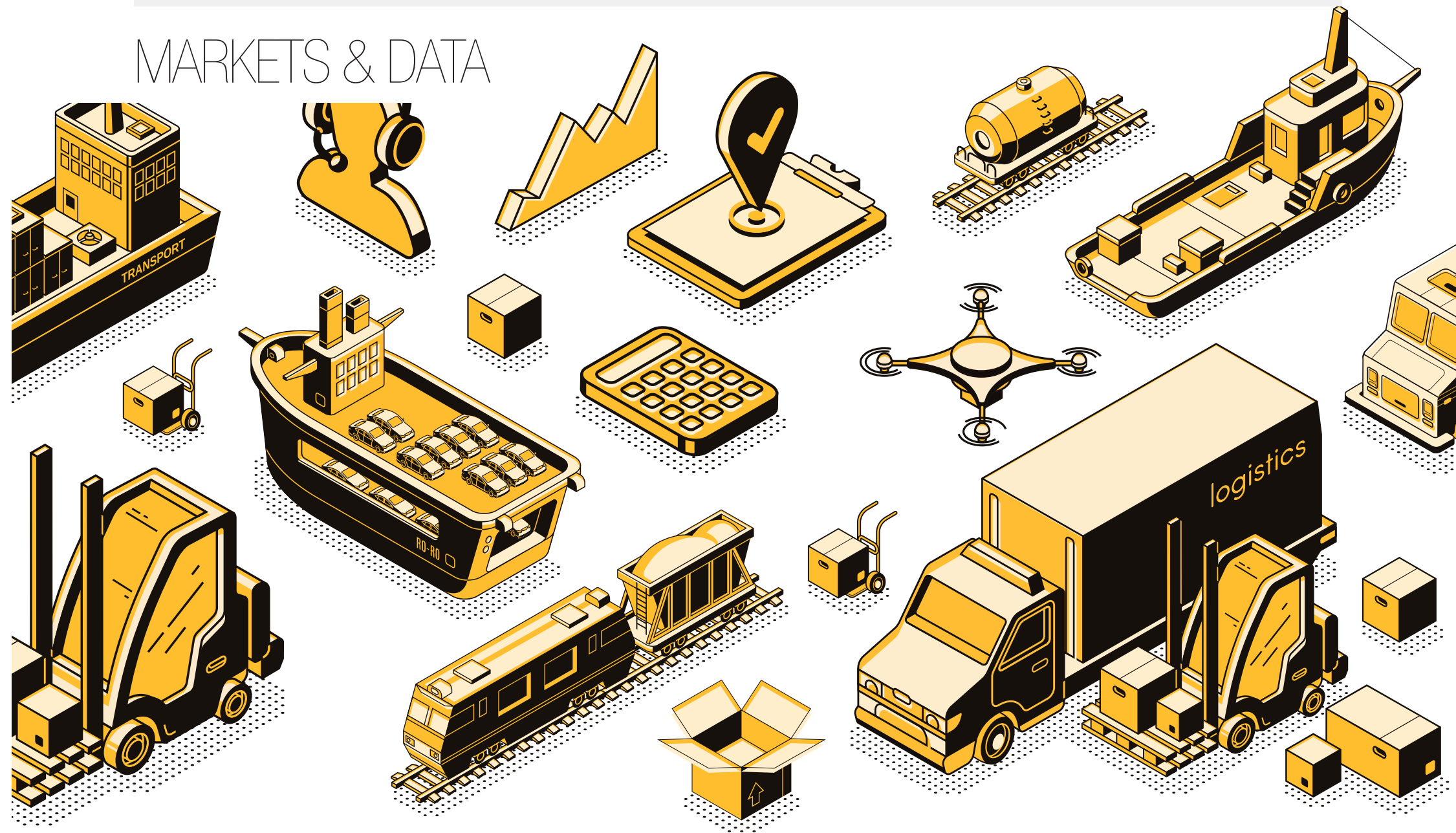
"Innovation, intended like the ability to respond to market demands as well as production and logistical changes, is even more of a priority today", said Rita Marchesini, Brazzale Marketing Manager. "For example, we should not get

stuck on the geographical origin of the raw material, which in any case is often made with foreign input. On the consumer side, we see the desire to choose value-added products. This is why we are working on new products from the Gran Moravia range and the Burro Superiore Fratelli Brazzale, which are increasingly meeting the interest

of consumers and intercepting a growing demand". As for meat, according to the analysis of the Interprofessional Organisation of Beef OICB, despite the recent difficulties, Italy remains the fourth producer of beef in Europe (10.2%) after France (18.4%), Germany (13.9%) and the United Kingdom (11.6%).



MARKETS & DATA



Once upon a time there was export

An 11.3% drop in the Italian foreign trade is expected in 2020. The worst setback since 2009, when it fell by 20.9%.

Depending on the different projections, however, the scenario could improve as early as 2021. The forecasts of the Sace Export Report.

A bad year for Italian exports. How bad, however, will depend on the progress of the pandemic in the last part of 2020. And from the imposition - or not - of new containment measures to stem the contagions. Presented on the 10th September in live streaming, the 2020 edition of Sace's annual Export Report tells of a more and more fragile global economy.

The Pandemic added to a long series of emerging risks: trade tensions between the United States and China, the uncertainties related to Brexit and the socio-political and economic crises in the Middle East. During 2020, the global picture has changed drastically. The outbreak of the pandemic and the 'great lockdown' in the first part of the year has led to a more heterogeneous and uncertain scenario, with some economies in slow recovery and geographical areas still deeply involved in the emergency.

"More indebted, less globalized, more digitized. This is how the post-Covid world will be," said the president of Sace, Rodolfo Ettore. "Export is the engine of our country and in the past, in times of crisis, it gave us the strength to resist. And I am sure it will represent a key driver also in this long awaited restart." Sta-

te representatives - the Minister of Economy Roberto Gualtieri and the Minister of Foreign Affairs Luigi Di Maio - and entrepreneurs: Oscar Farinetti, founder of Eataly and Alessandro Profumo, CEO of Leonardo, also gave their contribution to the presentation.

A gloomy outlook for year-end

Despite the geopolitical uncertainties of 2019, Italian exports of goods recorded a 2.3% growth in value, thanks to the good demand from non-EU markets (+3.9%), and a weaker demand from EU countries (+0.8%).

"In our base scenario, which in our opinion has the highest probability of occurrence, Italian exports of goods are expected to shrink in 2020: -11.3% to 422 billion euros. The lowest growth rate in exports since 2009, when foreign trade fell by 20.9%," said Sace's chief economist, Alessandro Terzulli. "The data for the first six months of the year show a 15.3% decline compared to the same period in 2019, but we expect a robust recovery starting from 2021 (+9.3%) and a relatively sustained growth trend in the two following years (+5.1%). This will result, at the end of the forecast horizon period, in 510 billion euro of global sales". As regards the Italian export of services, after

the collapse recorded in 2020 (-29.5% in the first quarter of the year), mainly due to the paralysis of tourism, a return to pre-crisis levels is expected as early as next year.

The analysis of key sectors...

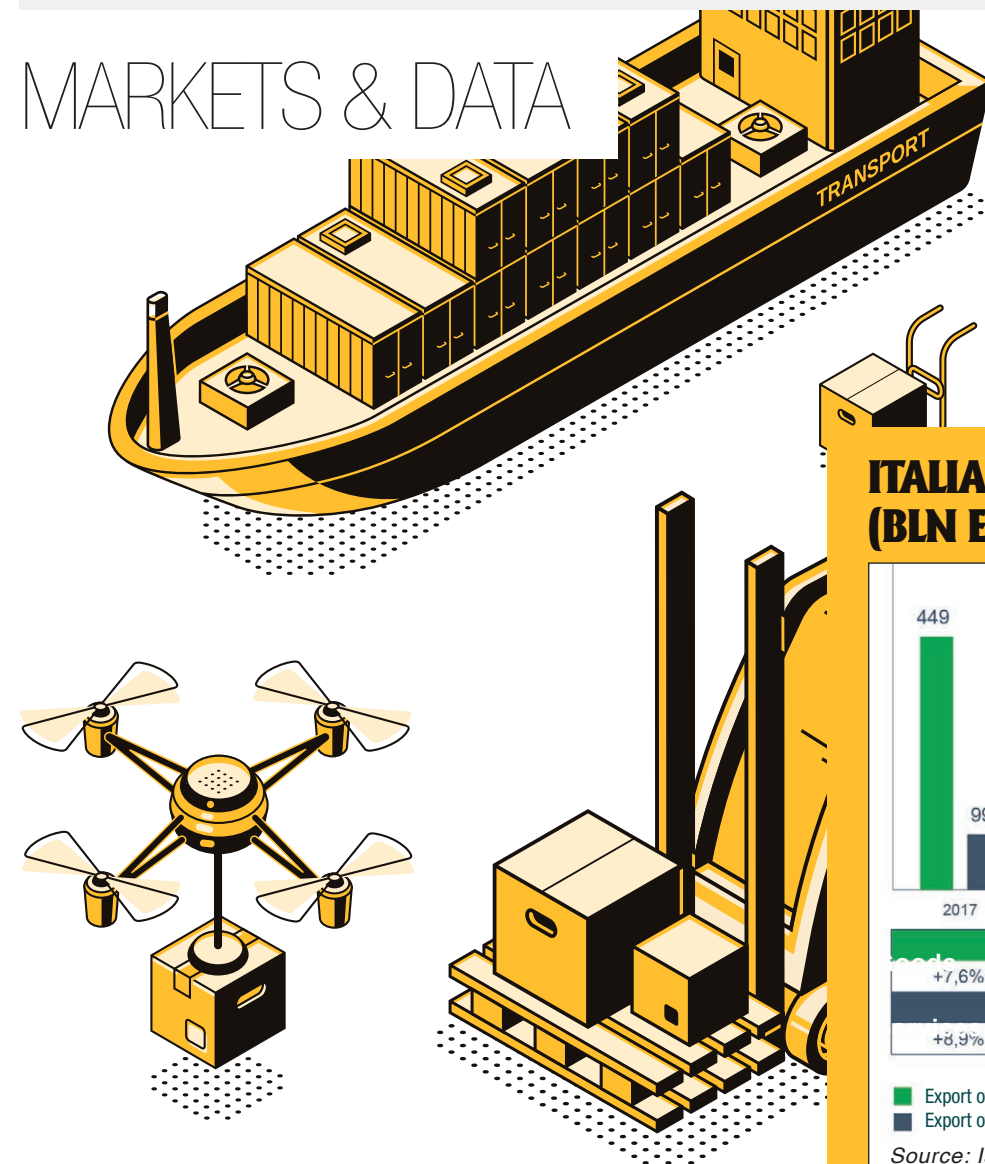
A strong contraction, yet followed by a substantial recovery will be recorded in the export of rubber and plastic products (-16.5% in 2020, +13.5% in 2021). A much lighter impact, mainly thanks to the pharmaceutical business, will be instead recorded by the chemical industry (-1.7% in 2020, +8.7% in 2021). As far as concerns consumer goods, exports in the fashion industry - severely affected by the 'great lockdown' - are expected to decline by 17.2% in 2020 and to recover slowly in the following year (+6.7%). For capital goods accounting for 38% of exports in 2019, which includes automotive, mechanical engineering and electrical appliances - the recovery will be slower. Exports are therefore expected to decline by 10.8% in the current year; in 2021, however, a 9.4% growth is expected.

One of the sectors less impacted by the sanitary emergency is the agri-food sector, thanks to the continuity of production and sustained demand in almost all distribution channels. A

end

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MARKETS & DATA



decline of 5.4% is expected as well as a rapid recovery next year (+8%). A relatively smaller drop is also expected for the export of agricultural commodities (-8.3% in 2020), followed by a quick recovery in 2021 (+9.1%).

...and markets

In the analysis of the destination markets of our exports, advanced Europe and North America (USA and Canada) - which together account for more than 60% of Italian international sales - will suffer the strongest contraction this year (with an average decrease of 11.4% and 9.8% respectively). Emerging European countries and markets in the CIA are expected to perform definitively better, also thanks to a relatively small decline this year (-8.1%). In these regions, sales of Italian goods will reach and exceed the levels of 2019 starting from 2021. Despite the shock, a return to growth is expected for Asian countries as early as 2021, and an increase in Italian exports to the area by 9%.

The future of Italian exports to Latin America and Sub-Saharan Africa is hard to predict, due to the heavy impact of the pandemic in the first region, and to the fears for an uncontrolled spread of the disease in the second. In Latin America, exports to the six largest economies will drop by around 8.2% in 2020, but in 2021 an average recovery of 7.5% is expected.

Let's get ready to more 'adverse' scenarios

In the 'base' scenario depicted by Sace, 2020 forecasts show a decrease of 11.3 percentage points in the export of goods from Italy. A result affected by the sharp -15.3% posted in the second quarter of the year and not offset by the slight increase recorded in the following months.

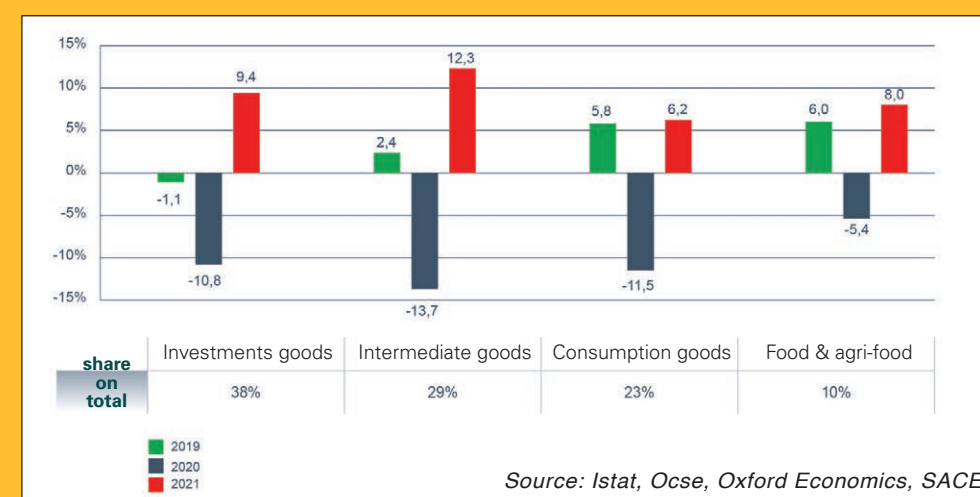
The uncertainties connected with the evolution of the sanitary emergency prompted Sace to simulate alternative scenarios based on different (worse) assumptions. A first alternative scenario considers the possibility of a new wave of the virus in the early months of 2021, even in countries where, at the moment, it is in a phase of containment. Another scenario, less drastic but still more negative than the 'base' one, assumes that the restrictions on economic activity and the measures of social distancing currently in place in many countries are loosened more slowly and gradually. In both cases, the collapse of Italian exports would be more severe: -12% or -21.2% respectively. 2021 would therefore no longer be a year of 'rebound', leaving the full recovery of exports to take place no earlier than 2023.

ITALIAN EXPORTS OF GOODS & SERVICES (BLN EURO; YEARLY % VALUE)



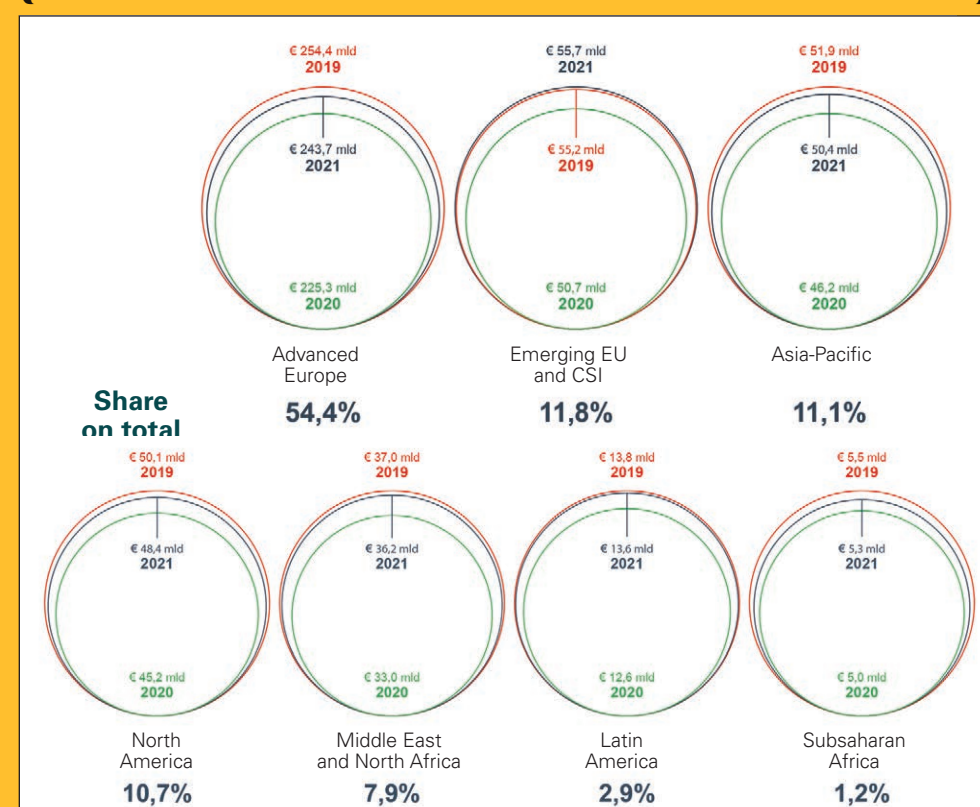
Source: Istat, Ocse, Oxford Economics, SACE.

GROWTH RATES OF ITALIAN EXPORTS FOR MAIN TYPES OF GOODS

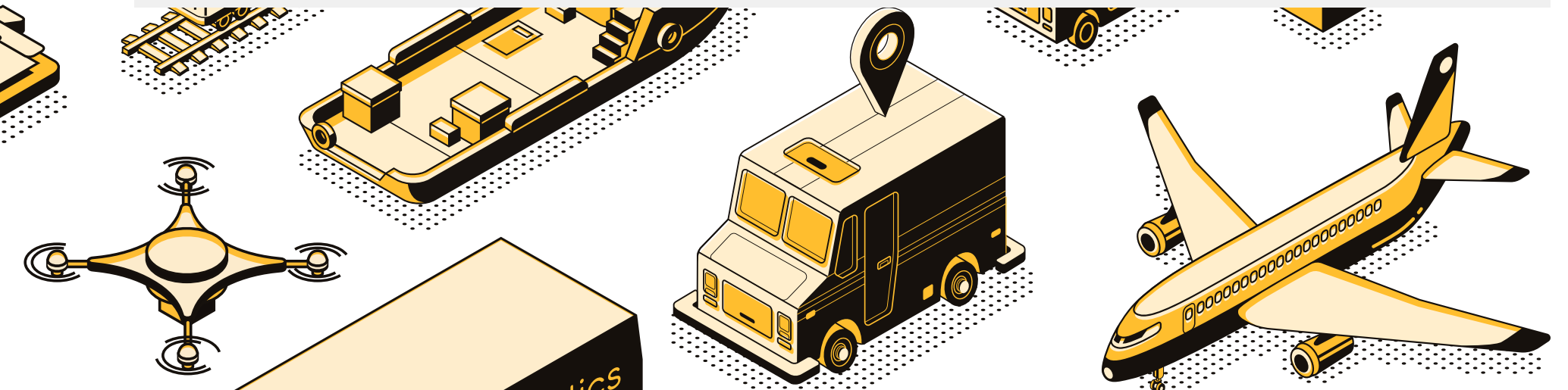


Source: Istat, Ocse, Oxford Economics, SACE.

ITALIAN EXPORTS BY GEOGRAPHICAL AREAS (BLN EURO; COMPARISON WITH 2019, 2020, 2021)



Source: Istat, Ocse, Oxford Economics, SACE.



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C'era una volta l'export

Attesa una contrazione dell'11,3% per il nostro commercio internazionale nel 2020. La peggiore battuta d'arresto dal 2009, quando il crollo fu del 20,9%. Lo shock della pandemia si è infatti innestato su un quadro dei rischi già piuttosto 'affollato': le tensioni commerciali tra Stati Uniti e Cina, le incertezze legate alla Brexit o alle crisi sociopolitiche ed economiche in Medio Oriente. A seconda dei modelli previsionali, però, lo scenario potrebbe migliorare già dal 2021. Le previsioni del Rapporto Export di Sace.



FOCUS ON



Private equity hunting for food companies

The investment funds target on family realities struggling with generational change and companies looking for capital. Kipre Group, Botter winery and Bertonecello among the most recent acquisitions.

Private equity a caccia di aziende alimentari

Nel mirino dei fondi d'investimento ci sono realtà familiari alle prese con il cambio generazionale e società in cerca di capitale. Gruppo Kipre, casa vinicola Botter e Bertonecello tra le acquisizioni più recenti.

The latest is Kipre Group, a charcuterie company that owns the brand Principe di San Daniele. The historic Trieste-based company (about 500 employees and a turnover of 170 million euros) was acquired by the Athena capital fund (Wrm). The investment put on the plate by Raffaele Mincione amounts to 40 million euros, allowing the financier to save a company that has entered a crisis due to different reasons. We clearly remember the letter of 28th December 2018 on the newspaper Sole 24 Ore in which Mario - who recently passed away - and Sonia Dukcevic threw digs at the lack of support from a bank to the relaunch of the company. And they advised their children Paola and Vladimir to "go abroad". Now the group seems to have left the crisis behind thanks to the Luxembourgish company of Mincione. Kipre will now be led by Walter Bellantonio, former director of Isa and former CEO of Cirio, Del Monte Italia and Centrale del Latte di Roma (See article on page 46).

A growing market

The shopping of Italian companies by private equity funds continued, despite the pandemic. The main focus was on family businesses struggling with generational change, which is still problematic. But also, on companies hit by the consequences of the Covid emergency. Because, while the redundancy pay has been a good shock absorber until now, when everything ends, entire sectors will face major difficulties. Another breath of fresh air has come from contributions or tax deferrals for the companies: but the fact is that, as with the redundancy pay, they are all measures with an expiration date. So, a showdown in fall - which is expected to be very hot - is just around the corner.

But how do the various investment funds operate? Their contribution obviously depends on the company's situation. They can recapitalize healthy businesses that need fresh capital to grow or finance the reorganization of the ownership. They often aim for 100% of the shares, but on other occasions they just settle for the majority. Leaving, in both cases, a role in the company to the old management, especially for the businesses run by families. In order to avoid problems and to support the family in a fierce market environment or in a difficult transition. "What's new compared to the 2009 crisis", explains Paolo Mascaretti of Kpmg to Repubblica Affari&Finanza, "is that private equity funds are very active and have a differentiated offer, from buy-out funds to minority growth funds, to family offices with a longer-term vision; as demonstra-



ted by the operations carried out during this year, the market is still lively".

The effects of the pandemic

Several transactions were concluded between May and August, although less than in 2019. "During the pandemic most of the funds were used to manage the companies they already had. But they have money to spend and are ready to buy companies again", explains Anna Gervasoni, general manager of

Aifi, the private equity and venture capital association. "Operations in Italy originate almost always from the sale of a family business", she continues. But what are the sectors that are most attractive to funds? "Certainly not those who were most affected by Covid: everything related to tourism, hotels, leisure and transport in general. Here the end of the crisis is not yet in sight, moreover, there is such a fragmentation that no fund dreams of buying a small bar or a small hotel in dif-

ficulty. What is needed here, above all, is state aid". Among the most attractive sectors in 2020 there are mechanics and food: Daroma coffee, Bertonecello gnocchi, Flowers Burger meatballs, Valpizza, Bindi desserts, Capitelli delicatessen and Kipre have all changed ownership.

To sum up, the funds buy companies in difficulty, but they must own the prerequisites for a relaunch. As Paolo Mascaretti explains: "The reasons why an entrepreneur wants to sell the company have not chan-

ged: on one hand, there may be a generational change; on the other, the need to grow while capital is lacking; in addition to capital, funds often also bring management that supports or replaces the entrepreneur".

A growing trend is the creation of structured groups in a given sector or in complementary segments: centers that bring together different companies, perhaps resold in three to five years, but able to compete on the international scene.

THE ACQUISITIONS IN FOOD SECTOR IN 2020

TARGET COMPANY	BUYER	ACQUIRED SHARE	TURNOVER (MILLION EUROS)
Botter winery	Clessidra (Italmobiliare)	Majority	180
Kipre Group	Athena capital (Wrm)	100%	170
Sipa (Bindi bakery)	Bc partners	Majority	140
Daroma coffee	Mandarin capital partners	Majority	26.8
Valpizza	Aksia group	Majority	20
Bertonecello gnocchi	Alcedo	70%	18
Capitelli deli-factory	Italmobiliare	Majority	14

Source: Kpmg/Repubblica Affari&Finanza



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PRODUCT SHOWCASE

What would Christmas be, without a good bottle of Italian wine?

Full-bodied red wines, mineral and elegant white wines, but also the most popular choice for a festive party: amazing bubbles. In the following pages, more than 40 surprising labels that customers around the world will love this December - also as elegant and classy gift ideas. For a memorable, Italian-style Christmas.

by Federica Bartesaghi



from page 76 to page 86

salumificiovolpi.it

allfoodsalumi.it

goldenfood.it

quintastagionespa.it



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PRODUCT SHOWCASE

TENUTA ALOIS LAGEDER
www.aloislageder.eu

2018 Pinot Noir Doc



Grapes
Pinot Noir
Land of production
Alto Adige, selected sites in Appiano, Pochi and Cortaccia.
Alcohol
12%
Brief description and organoleptic characteristics
Alto Adige is one of the few wine-growing areas of Italy with optimum conditions for this grape variety. Pinot Noir prefers cool, well ventilated sites and calcareous gravel soils with a high loam content. Alois Lageder Pinot Noir offers a convincing combination of finesse and body. Color is ruby-red with a garnet shimmer; the taste is fresh and aromatic, fruity (red berries, cherry) and mineral. The ideal aging is 2-5 years.
N. of bottles produced
43,333
Sizes
0,75 lt

CARRANCO
www.palmentocarranco.com

Etna Rosso Doc Villa dei Baroni 2017



Grapes
100% Nerello Mascalese
Land of production
Castiglione di Sicilia, Contrada Carranco
Alcohol
14% vol.
Brief description and organoleptic characteristics
The color is typical, ruby red but not too intense; the nose is fine with clear hints of red fruits, as well as floral, fresh and elegant notes. The mouth feel is structured and balanced, full-bodied and powerful with fruity hints of strawberry and cherry. Spiced notes of black pepper and rhubarb stand out as well. Lastly, tannin is savory and silky with a lovely length.
N. of bottles produced
10,000
Sizes
0,75 lt

CANTINA DI CARPI E SORBARA
www.cantinadicarpiesorbara.it

'Piazza Grande' Spumante di Modena PDO Brut



GIFT BOX WITH TWO BOTTLES

Grapes
Lambrusco di Sorbara, Lambrusco Salamino.
Land of production
Province of Modena.
Alcohol
11.5% vol.
Brief description and organoleptic characteristics
Obtained by Charmat Method. Light Rosé color. Fine persistent perlage. Intense, fresh and floral flavor. With strong personality, well balanced, with clear notes of small red fruits.
N. of bottles produced
50,000
Sizes
0,75 lt

CANTINA TOLLO
www.cantinatollo.it

Colle Secco Rubi Montepulciano d'Abruzzo PDO



3 LT SIZE IN CARDBOARD BOX. AVAILABLE ALSO WITH WOODEN POURER

Grapes
Montepulciano d'Abruzzo
Land of production
Province of Chieti, Pescara, Teramo
Alcohol
13.5% vol.
Brief description and organoleptic characteristics
Colour ruby red with purplish highlights and slightly garnet rim. Fragrance ripe red fruit, purplish colour, liquorice, cloves and cocoa spicy nuances. Full-bodied taste with a good structure with sweet tannins, well balanced with good length.
N. of bottles produced
550,000
Sizes
0.75 lt

BACIO DELLA LUNA
www.baciodelaluna.it

Bacio della Luna Prosecco Superiore Docg Millesimato Extra Brut



Grapes
100% Glera
Land of production
Conegliano, Valdobbiadene area.
Alcohol
11% vol.
Brief description and organoleptic characteristics
This fine and balanced wine, with bright straw yellow color and a finest perlage, is characterized by a delicate bouquet of acacia and wisteria flowers, with a soft fragrance of fresh fruits such as pear and peach.
N. of bottles produced
50,000
Sizes
0,75 lt

MAZZEI
www.mazzei.it

Castello Fonterutoli Chianti Classico Gran Selezione



AVAILABLE IN GIFT BOXES

Grapes
100% Sangiovese.
Land of production
Chianti Classico Area
Alcohol
13.80% vol.
Brief description and organoleptic characteristics
Perfect combination of elegance, structure and mineral character.
N. of bottles produced
40,000
Sizes
0,375 - 0,750 - 1,5 - 3 - 6 lt

TOSO
www.toso.it

Asti Docg Festoso



Grapes
100% Moscato Bianco
Land of production
Piedmont.
Alcohol
7% vol.
Brief description and organoleptic characteristics
Sweet, aromatic, fruity and floral sparkling wine, with moderate alcohol content and fine and persistent perlage. Yellow straw in color, it is a fine and elegant wine, suitable for celebrating any joyful moment.
N. of bottles produced
400,000
Sizes
0,75 lt

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PRODUCT SHOWCASE

CESARINI SFORZA
www.cesarinisforza.it

Cesarini Sforza Le Premier Trento DOC



GIFT BOX
CONTAINING
1 BOTTLE

Grapes
100% Chardonnay
Land of production
Trento DOC Hill
Alcohol
12.5% vol.
Brief description and organoleptic characteristics
A Classic Method sparkling wine that comes from Chardonnay grapes grown in vineyards in Trentino, the geographically defined area that defines Trento Doc. The Classic Method applied on this precious base produces a harmonious and elegant sparkling wine. Premier Brut is left to mature for at least 24 months in dark and silent cellars, until it takes on the definitive characteristics of aroma and flavour that distinguish it.
N. of bottles produced
150,000
Sizes
0,75 lt

DUCA DI SALAPARUTA
www.duca.it

**Colomba Platino Nero d'Avola IGT
Terre Siciliane**



Grapes
Nero d'Avola
Land of production
Central and Southern Sicily.
Alcohol
13-13,5 % vol.
Brief description and organoleptic characteristics
Intense ruby red color. Complex bouquet, with intense notes of marasca cherries and elegantly spiced. Well-bodied and persistent, it is ample and velvety in the mouth.
N. of bottles produced
57,000
Sizes
0,75 lt

FRATELLI BERLUCCHI
www.fratelliberlucchi.it

**'Freccianera Nature' Franciacorta Brut
Nature Millesimo 2015**



Grapes
85% Chardonnay, 15% Pinot Noir
Land of production
Franciacorta
Alcohol
12,5% vol.
Brief description and organoleptic characteristics
Franciacorta method (re-fermented in bottle) 48 months on yeasts. Colour: yellow with greenish reflections, abundant froth, extremely fine and intense perlage. Bouquet: yeasty naturally pleasant and with a light spicy note. Taste: dry, full, harmonic.
N. of bottles produced
N/A
Sizes
0,75 lt

GRUPPO ITALIANO VINI
www.gruppoitalianovini.it

**Amarone della Valpolicella Classico
Docg 2015**



Grapes
70% Corvina e Corvinone, 30% Rondinella
Land of production
Amarone Bolla is produced on the hills of the Classico district, Valpolicella.
Alcohol
15% vol.
Brief description and organoleptic characteristics
The wine ages for 24 months partly in small, first-passage French and American oak casks, partly in Slavonian oak barrels. A further 3 months is spent in bottle before going on sale. Intense ruby red colour. A spacious, layered nose with hints of forest berries and cherries. The palate plays on fruity notes and the finale is long and lingering.
N. of bottles produced
N/A
Sizes
0,375 - 0,75 - 1,5 lt

LEONE DE CASTRIS
www.leonedecastris.com

Five Roses Rosato Igt Salento



Grapes
90% Negroamaro, 10% Malvasia Nera di Lecce
Land of production
Salice Salentino
Alcohol
12% vol.
Brief description and organoleptic characteristics
The first rosé wine bottled in Italy, with its characteristic crystalline cherry-red colour and fruity scents of cherry and strawberry. In the mouth it is fresh, smooth and nicely persistent.
N. of bottles produced
150,000
Sizes
0,75 lt

MARCHESI ANTINORI
www.antinori.it

Villa Antinori Rosso Toscana Igt



Grapes
Cabernet Sauvignon, Sangiovese, Syrah, Merlot and Petit Verdot
Land of production
Tuscany
Alcohol
14% vol.
Brief description and organoleptic characteristics
Villa Antinori is deep ruby red in color. Its nose is intense and complex defined by notes of wild berries; blueberries and blackcurrants, and notes of toasted hazelnuts, spices and vanilla. A full-bodied palate is well-rounded with supple velvety tannins and a long savory finish.
N. of bottles produced
N/A
Sizes
0,375 - 0,75 - 1,5 - 3 lt

PLANETA
www.planeta.it

**La Segreta Il Rosso
Sicilia Doc 2018**



Grapes
50% Nero d'Avola, 25% Merlot, 20% Syrah, 5% Cabernet Franc
Land of production
Menfi, Agrigento, Sicily.
Alcohol
13% vol.
Brief description and organoleptic characteristics
This young fresh wine mainly produced from Nero d'Avola grapes, gains its personality and style with the addition of some international grapes. An intensely vivid ruby colour. On the nose aromas of redcurrant and mulberry with a slightly spicy and minty finish. In the mouth the wine demonstrates its fine personality with flavours of ripe wild fruits, balanced by a very pleasant full and herbal taste. The tannins are soft and smooth conferring a very versatile character to this red wine.
N. of bottles produced
350,000
Sizes
0,75 lt





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PRODUCT SHOWCASE

CAVIRO www.vignetiromio.it

Novebolle Romagna Doc Spumante Bianco Extra Dry



Grapes
75% Trebbiano, 20% Chardonnay, 5% Famoso
Land of production
Romagna.
Alcohol
11,5% vol.
Brief description and organoleptic characteristics
Gentle pressing of the grapes. The wine's fruity and floral flavors are obtained through fermentation at controlled temperature (15-18°C). Second fermentation in autoclave for about 30 days, which gives the typical perlage and all of the unique scents characteristic of this wine.
N. of bottles produced
50,000
Sizes
0,75 lt

MONTEVERRO www.monteverro.com

Terra di Monteverro 2015



GIFT
PACKAGING
UPON
REQUEST

Grapes
40% Cabernet Sauvignon, 40% Cabernet Franc, 15% Merlot, 5% Petit Verdot
Land of production
Maremma, Tuscany.
Alcohol
14% vol.
Brief description and organoleptic characteristics
Deep dark cherry with touches of ruby on the rim. On the nose there is an explosion of red fruits like raspberry, with touches of sundried tomatoes, eucalyptus and hits cassis, blueberries and cigar box. On the palate we have a velvety and fresh entrance evolving on structured tannins with red cherry, plum and cassis lingering on fresh tobacco.
N. of bottles produced
35,000
Sizes
0,75 lt

MOTTURA VINI DEL SALENTO www.motturavini.it

Primitivo di Manduria Doc



WOODEN
BOX
AVAILABLE

Grapes
Primitivo
Land of production
Municipalities in provinces of Taranto, Apulia.
Alcohol
14,5%
Brief description and organoleptic characteristics
Intense red color with purplish reflections. Austere bouquet of red fruits in jam, Morello cherry, dried plum. Tertiary hints of vanilla and cloves. Velvety, full-bodied and harmonious taste.
N. of bottles produced
50,000
Sizes
0,75 lt

CAVIT www.cavit.it

Müller Thurgau Spumante Vigneti delle Dolomiti Igt Metodo Charmat



Grapes
Müller Thurgau
Land of production
Trentino areas which are particularly suited to the production of white grapes: Val di Cembra, Valle di Cavendine, Brentonico Plateau.
Alcohol
11,50% vol.
Brief description and organoleptic characteristics
Persistent foam with refined perlage, pale straw colour with distinct greenish tinges. Delicate, subtly aromatic nose with fruity undertones. Smooth, fresh and elegant on the palate with excellent character.
N. of bottles produced
N/A
Sizes
0,20 - 0,75 -1,5 - 3 lt



Goodness never comes alone.

Truffle blue cheese by Costa



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Mario Costa S.p.A. Via dell'Industria, 26 Località Orfengo 28060 Casalino (Novara) Italy tel. (+39) 0321.877566 info@mariocosta.it www.mariocostagorgonzola.it





PRODUCT SHOWCASE

TENIMENTI CIVA www.tenimenticiva.com

Friulano Biele Z e Cuv e 85 I 15 - Friuli Colli Orientali DOC



Grapes
Friulano
Land of production
Friuli Colli Orientali.
Alcohol
13% vol.
Brief description and organoleptic characteristics
Pale lemon colour with greenish highlights; the aromas remind the peach leaf and the almond. Great finesse on the palate, soft and velvety, floral, fruity and with the classic almond after taste. The finish is persistent and elegant.
N. of bottles produced
20,000
Sizes
0,75 lt

F.LLI GANCIA & C. www.gancia.com

Pinot di Pinot Brut - Brut Sparkling Wine



Grapes
Pinot Bianco, Pinot Nero, Pinot Grigio
Land of production
Canelli, Asti.
Alcohol
11,5% vol.
Brief description and organoleptic characteristics
Straw yellow colour with greenish reflexes. Fine and persistent perlage. Bouquet with fresh fruit and floral notes like acacia flowers. Pleasant, fresh and moderately dry taste.
N. of bottles produced
N/A
Sizes
0,20 - 0,75 - 1,5 lt

ROTARI www.rotari.it

Rotari Brut Ros , Metodo Classico, Trentodoc



Grapes
90% Pinot Noir, 10% Chardonnay
Land of production
Vineyards on the hilly slopes of Trentino.
Alcohol
12.5% vol.
Brief description and organoleptic characteristics
Color: soft pink. Bouquet: elegant, fruity, extreme subtlety and hints of wild strawberries, currant, and grape stems. Flavor: fresh, fragrant, intense, with hints of yeast and spices. Perlage: delicate and persistent.
N. of bottles produced
N/A
Sizes
0,75 lt

FONTANAFREDDA www.fontanafredda.it

Moscato d'Asti



Grapes
Moscato
Land of production
In the Alba and Asti territories (Langhe)
Alcohol
10% vol.
Brief description and organoleptic characteristics
Soft pressing of whole grapes, fining and filtration of the must prior to the fermentation in pressure tanks at a low temperature. Intense nose of musk, black locust and orange flowers, sage and honey. Clear, straw-yellow wine with a pleasantly sweet taste that is very well-balanced and features honey and just-picked grapes. Few days after the bottling the wine is ready to be consumed.
N. of bottles produced
250,000
Sizes
0,75 lt



CANTINA SOCIALE DI GUALTIERI www.cantinasocialegualtieri.it

Sparkling Fogarina Ros  PGI



GIFT BOX
WITH TWO
BOTTLES

Grapes
100% Fogarina
Land of production
Sandy and fresh lands located in the municipality of Gualtieri, Reggio Emilia.
Alcohol
10,5% vol.
Brief description and organoleptic characteristics
Bright and transparent, the vibrant cherry colour meets harmoniously with the raspberry fruit fragrance together with the wild strawberry and wild rose petals. The taste is precise, refreshing, absorbing.
N. of bottles produced
20,000 (vintage 2020)
Sizes
0,75 lt

CANTINA PRODUTTORI BOLZANO www.kellereibozen.com

Alto Adige Gew rztraminer DOC 2019



Grapes
100% Gew rztraminer
Land of production
Southtyrol.
Alcohol
14% vol.
Brief description and organoleptic characteristics
The grapes, which are harvested from selected sites, produce a wine that is intensely fruity and full-flavored with a zesty opulence. Color: bright straw yellow with golden hues. Aroma: aromatic with notes of rose, lychee, grapefruit and lime, and hints of orange zest and clove. Taste: full-flavored, complex and smooth with a lovely aromatic note and lively acidity.
N. of bottles produced
100,000
Sizes
0,75 lt

ZONIN www.zonin.it

Zonin Prosecco Millesimato Extra Dry



Grapes
100% Glera
Land of production
Prosecco Doc Area
Alcohol
11% vol.
Brief description and organoleptic characteristics
Bright pale straw-yellow color; a fine, clear mousse with a very delicate perlage. Attractively intense bouquet; very fruity and aromatic, with hints of wisteria flowers and Rennet apples. Very well-balanced and appealing flavour, with the extremely delicate almond note that is typical of Glera.
N. of bottles produced
1 million
Sizes
0,200 – 0,75 lt

POGGIO CAGNANO www.poggiocagnano.it

Altaripa Doc Maremma Toscana Sangiovese



GIFT
BOXES
AVAILABLE

Grapes
Sangiovese
Land of production
Manciano, Grosseto, Tuscany.
Alcohol
14% vol.
Brief description and organoleptic characteristics
Very elegant on the nose; red berries, medicinal herbs, small spices and minerals like flint for a complex bouquet. Silky tannic structure in the mouth; round and balanced with deep intensity and a long and persistent finish.
N. of bottles produced
2,000
Sizes
0,75 lt



PRODUCT SHOWCASE

C A R D B O A R D B O X E S

BOTTEGA www.bottegaspa.com

Petalo Moscato 'Il vino dell'amore' (The wine of love)



Grapes
Moscato
Land of production
Veneto
Alcohol
6,5% vol.
Brief description and organoleptic characteristics
The wine is characterized by a limited alcohol content and by an important sugar residue. The sparkling process, following the Martinotti method, is carried out in an autoclave, a particular pressurized steel tank that allows precise control of both pressure and temperature to preserve the fragrance and the typical aromas of the starting grapes. Intense, floral, fruity, with hints of rose, yellow peach, pear, exotic fruit and notes of sage in the finish. It is a sweet wine, ideal for celebrating holidays and anniversaries.
N. of bottles produced
792,000
Sizes
0,75 lt

SANTA CRISTINA www.santacristina.wine

Santa Cristina Brut Metodo Classico



Grapes
Chardonnay, Pinot Nero and a small percentage of Pinot Bianco
Land of production
N/A
Alcohol
12,5% vol.
Brief description and organoleptic characteristics
Santa Cristina Spumante is yellow in color with golden hues. Abundant effervescence with fine, lingering perlage. On the nose aromas are intense with notes of apples, white peaches, crusty bread and yeast. Its palate is remarkably harmonious and expresses the typical liveliness of Brut Spumante. Notes of ripe fruit add depth and balance.
N. of bottles produced
N/A
Sizes
0,75 lt

CANTINA DI SOAVE www.maximilianspumante.it

Maximilian I Blanc De Blancs Extra Dry



Grapes
Indegenous white grapes
Land of production
Verona
Alcohol
11.5% vol.
Brief description and organoleptic characteristics
Harmonious sparkling wine with a rich, long-lingering bead of pin-point bubbles.
N. of bottles produced
20,000
Sizes
1,5 lt

NALS MAGREID www.kellerei.it

Lyra Gewürztraminer Alto Adige Doc



Grapes
100% Gewürztraminer
Land of production
Söll, Termeno, Bolzano.
Alcohol
15% vol.
Brief description and organoleptic characteristics
An unmistakably intensive, aromatic bouquet with aromas of fresh roses, cloves and lychee is the distinctive mark of this golden yellow Gewürztraminer. Grown in the Gewürztraminer's natural and traditional habitat, Tramin, it embodies the opulence and strength of a smooth and full-bodied wine, crowned with a long finish.
N. of bottles produced
25,000
Sizes
0,75 lt

GIACOBBAZI VINI www.giacobbazivini.it

Giacobazzi Metodo Classico



Grapes
Sorbara
Land of production
Sorbara, Modena.
Alcohol
11% vol.
Brief description and organoleptic characteristics
Sorbara grapes vinified in white and fermented naturally in the bottle according to the Classic Method. The best bunches are selected and hand-picked. After a soft crushing and the first fermentation, the bottles lay in stacks for at least 36 months. The wine has a straw yellow color with a fine and persistent perlage. It's a complex wine, with nuances reminiscent of the golden apple and bread crust, enriched with mineral notes.
N. of bottles produced
3,000
Sizes
0,75 lt

TENUTA MAZZOLINO www.tenuta-mazzolino.com

Blanc De Blancs - VSQ Spumante



Grapes
100% Chardonnay
Land of production
Vigna Bosco, Oltrepò Pavese.
Alcohol
12,5% vol.
Brief description and organoleptic characteristics
Bright straw yellow with a fine-grained, long-lasting perlage. Crisp, bright bouquet, reminiscent of grape-fruit and candied lemon rind, with hints of white flowers and yeasts (pain grillé). Rich, creamy and complex mouthfeel. The fizziness is silky, long-lasting and beautifully blended with the acidity.
N. of bottles produced
N/A
Sizes
1,5 lt

VALDO SPUMANTE www.valdo.com

Oro Puro Valdobbiadene Prosecco Superiore Docg Brut



Grapes
100% Glera
Land of production
Valdobbiadene
Alcohol
11,5% vol.
Brief description and organoleptic characteristics
Pure and prestigious features. Precious and eternal as special instants in life. Rare and unique such as the Prosecco Superiore land, the gold of Valdobbiadene. Straw yellow colour with gold bright reflections. Fine and persistent perlage. Typically floral with strong pear and Golden apple fruity aroma. Refined, harmonious, lingering aroma and sapidity.
N. of bottles produced
150,000
Sizes
0,75 lt

Oro Puro Valdobbiadene Superiore di Cartizze Docg



Grapes
100% Glera
Land of production
Valdobbiadene
Alcohol
11% vol.
Brief description and organoleptic characteristics
Refined and smooth spumante wine. Its grapes are grown only on the huge and sunny part of the Cartizze hills. Bright straw yellow colour with a light golden hue. Sharply defined aroma emphasized by floral and fruity scents.
N. of bottles produced
130,000
Sizes
0,75 lt

CANTINA VALTIDONE www.cantinavaltidone.it

Swing Spumante sparkling Extra dry



Grapes
Pinot Noir.
Land of production
Cultivated in Val Tidone vineyards.
Description and organoleptic characteristics
From Pinot Noir grapes manually collections to end of August, all this to preserve his acidity and the characteristic aromas that make it single. Exuberant white foam; thin, continuous and persistent perlage; perfume of fresh flowers with hints of rose; dry, fresh and balanced flavor. Serve at 10 ° in combination with first courses, white meats and fish.
Sizes
Plavis sparkling wine bottle 0,75 lt. with sleeve

Brut sparkling wine 'Perlage' - Classic method



Grapes
A skilful mix of Chardonnay and Pinot Nero, from the most suitable vineyards of the hills of Val Tidone, caught in the moment optimal: limited sugar content; adequate acid content; maximum wealth of varietal aromas. It is produced only in the best years.
Land of production
Hills of Val Tidone
Alcohol
12% vol.
Brief description and organoleptic characteristics
Exuberant white foam; very fine perlage, continuous and persistent; golden yellow color brilliant; intense, penetrating and complex (hints of bread crust, toasted almonds, golden apples, berries and mineral memories); dry taste without harshness, very elegant, fresh and straightforward, with long and pleasant aromatic persistence.
Sizes
0,75 – 1,5 lt



PRODUCT SHOWCASE

WOODEN BOXES

BANFI www.banfi.it

Castello Banfi Brunello di Montalcino Docg
Castello Banfi Rosso di Montalcino Doc
Centine Toscana Igt



Description
Wooden box including 1 bottle Castello Banfi Brunello di Montalcino, 1 bottle Castello Banfi Rosso di Montalcino, 1 bottle Centine Toscana Igt.

Grapes
Brunello di Montalcino Docg (Sangiovese 100%); Rosso di Montalcino Doc (Sangiovese 100%); Toscana Igt (blend of red grape varieties).

Land of production
Brunello di Montalcino Docg (Montalcino, Si); Rosso di Montalcino Doc (Montalcino, Si); Toscana Igt (blend di varietà rosse), Tuscany.

Alcohol
Castello Banfi Brunello di Montalcino Docg (13,5% vol)
Castello Banfi Rosso di Montalcino Doc (14% vol)
Centine, Toscana Igt (13,5% vol)

Sizes
0,75 lt

CANTINE SETTESOLI www.cantinesettesoli.it

Settesoli Collezione Sicilia Doc



Description
Wooden gift box that contains one bottle of Settesoli Collezione Nero d'Avola/Syrah and one bottle of Settesoli Collezione Grillo/Chardonnay.

Grapes
50% Nero d'Avola, 50% Syrah

Land of production
Menfi, Agrigento, Sicily.

Alcohol
13,5% vol.

N. of bottles produced
30,000

Alcohol
13,5% vol.

Sizes
0,75 lt

FRESCOBALDI www.frescobaldi.com

Nipozzano Riserva 2016 - Chianti
Rufina Riserva Docg



Description
Wooden case of 12 bottle in 4 different and collectable subjects representing the unique local biodiversity, in a perfect balance between vegetal and animal species.

Grapes
Sangiovese and complementary varieties.

Land of production
Castello Nipozzano, historical Frescobaldi estate a few kilometers North of Florence.

Alcohol
13% vol.

N. of bottles produced
300,000 bottles - 3,000 cases

Sizes
0,75 lt

UGGIANO www.uggiano.it

Chianti Riserva Docg 'Fagiano'



Grapes
90% Sangiovese, 10% Canaiolo Nero

Land of production
Tuscany, Chianti.

Alcohol
13,5% vol.

Brief description and organoleptic characteristics
Chianti Riserva aged in 225 lt French oak barrels and 30 hl big oak casks from Slavonian oak. Ruby red color with garnet hues. Subtle bouquet with hints of sour black cherry, wild berries and violet accompanied by vanilla's nuances. On the palate, it's round and full of body, with a persistent and slightly tannic aftertaste.

N. of bottles produced
2,000

Sizes
1,5 lt

TENUTE PICCINI www.tenutepiccini.it

Tris Collezione Oro



Description
1 bottle Collezione Oro Chianti Riserva Docg; 1 bottle Collezione Oro Orvieto Classico Doc; 1 bottle Collezione Oro Toscana Rosso Igt. The decision to call this premium wine range 'Collezione Oro' (Golden Collection) is not merely an euphemism, it is meant to announce even from the label its exceptional quality.

Grapes
Chianti Riserva Docg (90% Sangiovese, 10% Cabernet Sauvignon); Orvieto Classico Doc (Grechetto G5 40%, Grechetto G109 15%, Procanico 40%, Chardonnay 5%); Toscana Rosso Igt (70% Sangiovese, 25% Cabernet Sauvignon, 5% Petit Verdot).

Land of production
Chianti Classico, Orvieto Classico, Tuscany.

Alcohol
Chianti Riserva Docg (13.5% vol.); Orvieto Classico Doc (12.5% vol.); Toscana Rosso Igt (13.5% vol.)

N. of bottles produced
Chianti Riserva Docg (1.100.000); Orvieto Classico Doc (100.000); Toscana Rosso Igt (30.000)

Sizes
0,75 lt

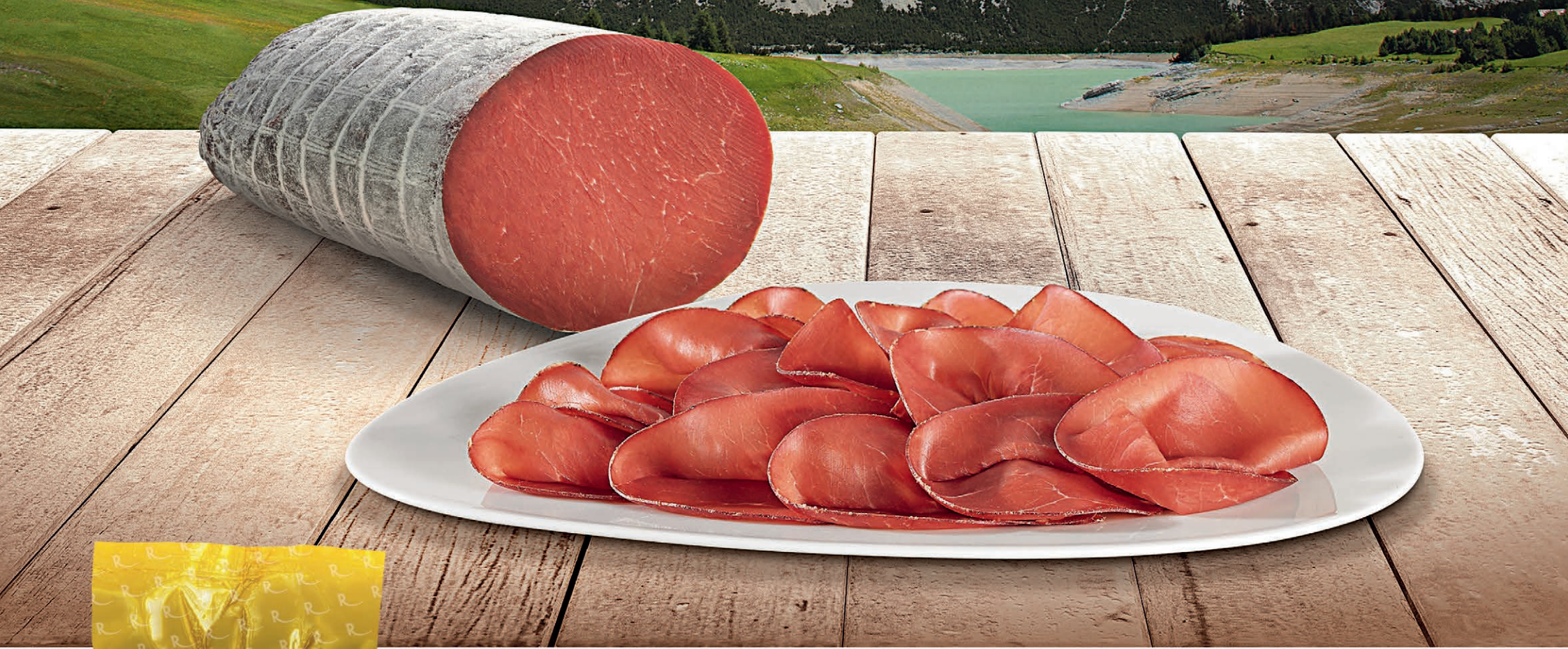


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Bresaola della Valtellina P.G.I.

TOPSIDE

A CENTURY LONG TRADITION OF EXCELLENCE.



It is simply the best P.G.I. Bresaola della Valtellina. It is produced with topside, a prime cut of beef hindquarter, cured with the finest spices and flavourings from all over the world. The production process follows a century-old traditional recipe which preserves the authenticity and freshness of the product, its unmistakable taste and the organoleptic qualities. Bresaola is an ideal food to meet the daily nutritional needs because it is rich in protein, low in fat, and an important source of potassium and vitamins B1, B6 and B12.



RIGAMONTI
Qualità dal 1913

OUR PRODUCTS ARE SAFE, ITALIAN AND NATURALLY ORGANIC



FREEDOM OF MOVEMENT

both indoors and outdoors in spaces
that are 4 times larger
than standard sizes



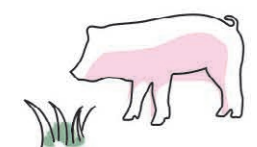
HIGH BIOSECURITY PARAMETERS

to minimize the use of antibiotics



ORGANIC FEED

is grown on our own land



FARROWING PENS

sows free when lactating
and after insemination



- 100% ITALIAN MEAT
- GLUTEN AND LACTOSE FREE
- PACK ECO-FRIENDLY

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Our products
mirror our
values



The ethical label
www.fumagallisalumi.it