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THE ITALIAN FOOD MAGAZINE BUYER'S • GUIDE

YEAR 10 - N° 3 • APRIL 2022
MANAGING DIRECTOR: ANGELO FRIGERIO



ITALIANA CAPERS SUD s.r.l.

the poetry
of a flower
in an explosion
of life

CAPP
ARIS

VISIT US AT CIBUS PAD 05 STAND E 030



UNIONE EUROPEA
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REPUBBLICA ITALIANA



REGIONE
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Italiana Capers Sud srl offers quality products that it packs and sells in salt, vinegar and brine in a vast assortment of calibers (sizes) and packages capable of satisfying any need and request of customers. Capers, for their unmistakable aroma and intense fragrance, give flavor and sapidity to the dishes, enriching them.



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AT CIBUS

PAD 05
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THE EXCELLENCE OF OUR LAND

"Caper of the Aeolian Islands DOP" from organic farming

La Italiana Capers Sud srl, certified organic for decades and proud to offer its customers also a recognized and certified DOP product. 500 g or 5 kg or in brine in buckets of various weights.

HOW TRADITION TASTES LIKE



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A MODERN TWIST ON AN ANCIENT FLAVOR



Capers in sea salt

SALT The Italiana Capers Sud srl, in the wide range of capers offered for sale, also offers them in salt. This method of conservation respects the traditions handed down from generation to generation and allows the product to keep its peculiar qualitative and organoleptic characteristics intact over time, enhancing its aroma and also guaranteeing a longer conservation. The company offers them in plastic bags and buckets of various weights and different calibers, in order to satisfy any need of its customers. For correct use, desalt well before use.

www.capersud.it

COME MEET US AT CIBUS (PARMA | 3-6 MAY 2022) HALL 07-08 BOOTH H 036

EVENTS



Alimentaria 2022: ¡Bienvenida Italia!

On stage in Barcelona, on the past 4-7 April, the major Spanish food & beverage trade show. A high attendance of buyers was recorded, as well as a large number of Italian exhibitors.

on pages 32 and 33

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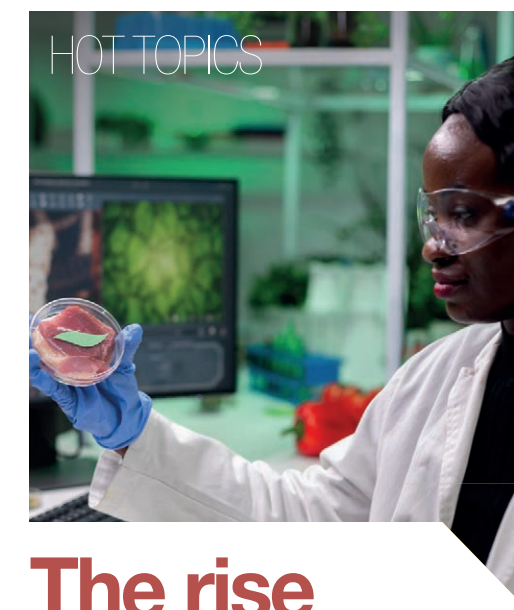


The new challenges of food&beverage

Trends and prospects of the agrifood segment at the core of the workshop by Cerved. In order to enable companies to better face the complex Italian and international situation, characterized by ever-growing production costs and the rising inflation.

on pages 14 and 15

HOT TOPICS



The rise of the 'substitutes'

The plant-based market is surging, just like the related process technologies. But are these 'alternative' products really healthy options? It depends on how much processed they are, according to a recent WHO report.



from page 40 to 44

ZOOM

Marketplace: a gateway to the future

on pages 8 and 9

INSIGHTS

Global powers of retailing: the ranking

on pages 34 and 35

MARKETS & DATA

Conquering international markets

on pages 36 and 37

PRODUCT SHOWCASE

FIND THEM OUT AT CIBUS 2022

Parma's food & beverage trade show is back from May 3 to 6. On display, the flagship products as well as the latest launches by more than 3,000 exhibitors. Here is an interesting selection for all tastes (and buyers): from savory bakery to sweets, from grocery to dairy and deli meats.

from page 19 to page 30

DELI MEATS

Le Famiglie del Gusto: all for one, one for all

Passion, strong traditions and a strive for innovation are the hallmarks of the network that embraces four Italian family-run companies, specialized in delis for over 50 years. New launches and market trends. Interview with Costanza Manzini, export manager.

on pages 12 and 13

INSIGHT

Culatta Emilia: different is beautiful

One of the most authentic Italian delis is today guaranteed by a new Consortium. Whose aim is to protect and promote a cornerstone of the Emilian charcuterie around the world. As well as encourage producers to enhance their individual, unique features.

page 16

THE COMPANY

The Bridge brims with authenticity



Passion, innovation and sustainability. These are the landmarks of the first Italian manufacturer of 100% organic and vegan drinks.

page 18



EDITORIAL

by Federica Bartesaghi

The show must go on

The agro-food industry is in chaos. The astonishing increase in energy costs, the unavailability of raw materials and ingredients, the conflict between Russia and Ukraine, the transport difficulties... In recent months all companies, without exception, had to face a dramatically worsening scenario, where worries and uncertainties prevail. Because what terrifies the most is precisely the unknown. As the owner of a food company, that we met during a sector's trade show, well summarized: "Tomorrow I have to make an important decision: whether to invest or not half a million euro in expanding production. If I look around, I see enthusiasm and desire to restart, so I would invest without a doubt. But if I think of the market situation, of what is going on between Russia and Ukraine and which, from one day to the next, could interest the whole of Europe, I think it is better to give up. The worst thing is to live in this uncertainty."

And this is actually how the current scenario looks like. After the shock of the pandemic, the economic recovery had finally begun, as the (positive) balance sheets of the main Italian industrial associations also indicated. The same associations that, now, are asking the Italian and European institutions to take action to avoid the production paralysis.

A case in point Ivano Vacondio, president of Fe-

deralimentare (the federation that represents and protects the Italian food industry), who recently said: "The war in Ukraine is causing a peak in the prices of gas and fundamental raw materials, like wheat, corn and sunflower and the situation of transports is further exacerbating these problems. Now that the Black Sea is blocked, the only possible transport way is by land and by rail but Hungary is making the transport of cereals very difficult these days, if not impossible, causing a real supply chain disruption for our country." With regard to the need for improved synergy between industry and distribution, he launched an appeal to retailers: "Some companies will close. Everyone has to do their part. The food industry has absorbed the cost increases in November and December, but they can't stand it any longer."

And yet, even with these concerns in mind, Italian food & beverage companies are ready to 'polish themselves up' since major international trade shows are approaching, to liven up the business after the long stop imposed by the pandemic. First and foremost Cibus, to be held in Parma from 3 to 6 May. Within this issue of The Italian Food Magazine, you will find a wide preview of the products that Italian companies will present to global markets during the exhibition. Because never like today, 'The show must go on'.

The show must go on

L'industria agroalimentare è nel caos. L'esorbitante aumento dei costi energetici, l'indisponibilità di materie prime e ingredienti, il conflitto Russia e Ucraina, le difficoltà logistiche... in questi mesi tutte le aziende, senza eccezioni, hanno dovuto affrontare uno scenario in drastico peggioramento su questi e altri fronti. La preoccupazione è grande, l'incertezza domina, perché ciò che spaventa maggiormente è proprio l'incognita dei domani. Come ben riassume ciò che il titolare di un'azienda dell'agroalimentare, incontrato durante una fiera di settore, ci ha confidato: "Domani ho un incontro per decidere se investire mezzo milione di euro nell'ampliamento della produzione. Se mi guardo intorno, vedo entusiasmo e voglia di ripartenza, quindi investirei senza dubbio. Se invece penso alla situazione del mercato, a quello che sta accadendo tra Russia e Ucraina e che da un giorno all'altro potrebbe coinvolgere l'Europa intera, penso che sia meglio rinunciare. La cosa peggiore è vivere nell'incertezza".

E lo scenario è proprio questo. Dopo la 'mazzata' della pandemia, la ripresa economica era finalmente iniziata, come indicavano anche tutti i bilanci (in positivo) delle principali associazioni di settore. Le stesse che, ora, si appellano alle istituzioni italiane ed europee affinché venga fatto qualcosa di concreto per evitare la paralisi produttiva.

Un esempio su tutti Ivano Vacondio, presidente di Federalimentare (la federazione che rappresenta e tutela l'industria alimentare italiana), che nelle scorse settimane ha affermato: "La guerra in Ucraina sta provocando un aumento di prezzi smisurato di gas e di materie prime fondamentali, come il grano, il mais e il girasole e la situazione logistica non migliora la situazione. Con il blocco del Mar Nero, infatti, l'unico trasporto possibile è quello via terra e via ferro ma l'Ungheria, proprio in questi giorni, sta rendendo molto difficile se non impossibile il trasporto dei cereali,

provocando un reale rischio di approvvigionamento per il nostro Paese. E in merito alla necessità di una maggiore e migliore sinergia tra industria e distribuzione, ha lanciato un appello al mondo retail: "Ci sono aziende che chiuderanno. Ognuno deve fare la sua parte, l'industria ha assorbito gli aumenti nei mesi di novembre e dicembre, ora non riesce più a farlo".

E tuttavia, pur con queste preoccupazioni in testa, le aziende italiane dell'agroalimentare sono pronte a 'tirarsi a lucido' in occasione delle principali fiere di settore che tornano finalmente ad animare il business dopo lo stop imposto dalla pandemia. Prima fra tutte Cibus, a Parma dal 3 al 6 maggio. All'interno di questo numero di The Italian Food Magazine, troverete un'ampia anteprima dei prodotti che le aziende italiane presenteranno ai mercati mondiali nel corso della rassegna. Perché, mai come oggi, The show must go on.

#PERFECTTOMATCH

TASTE AND FRESHNESS

The advertisement for Sterilgarda features a central image of three products: a carton of Microfiltrato latte parzialmente scremato, a carton of 100% TROPICALE, and a tub of Mascarpone. The products are set against a background of a milk splash and a fruit splash. Surrounding the products are various food items: cookies, a glass of milk, a bowl of fruit, a bowl of yogurt, and a chocolate bar. The Sterilgarda logo is prominently displayed at the bottom, along with the website STERILGARDA.IT.



NEWS

IN 2021 ITALIAN FRESH PRODUCE EXPORTS ACCOUNT FOR 5.2 BILLION EURO (+8.3%)

In 2021, Italian fruits and vegetables register a growth in value of 8.2%, which equals to 5.2 billion euro, scoring a growth in volume of 1.8%, reaching 3.6 million tonnes. The imports, on the other hand, decrease by 0.3% at almost 4.18 billion euro, for a trade balance that exceeds 1 billion euro. This is what emerges from the ISTAT data, issued by Fruitimprese. In more detail, the most significant increases have characterized: tropical fruits (+23.1%), dried fruits (+16.3%), pulses and vegetables (+11.9%). Among the most exported products, instead, apples (+5.74%, over 881 mln), table grapes (+1.2%, 729 mln), kiwis (+2.63%, 473 mln) stand out. Peaches (+26.53%, 137.4 mln), oranges (+5.37%, 113.8 mln), pears (-10%, 106.4 mln) and lemons (-19.3%, 66 mln) also continue to grow. Among the most imported products once again there are bananas (-3.87%, 430.5 mln) and pineapples (+8.7%, 97 mln).

Nel 2021 export di ortofrutta italiana a 5,2 miliardi (+8,3%)

Nel 2021 l'ortofrutta italiana registra una crescita a valore dell'8,2%, a 5,2 miliardi di euro, per una crescita a volume dell'1,8%, a 3,6 milioni di tonnellate. L'import, dal canto suo, cala dello 0,3% a circa 4,18 miliardi di euro, per una bilancia commerciale che supera il miliardo di euro. È quanto evidenziano i dati Istat, elaborati da Fruitimprese. Entrando nel dettaglio delle categorie merceologiche, le crescite più importanti hanno interessato: frutta tropicale (+23,1%), frutta secca (+16,3%), legumi e ortaggi (+11,9%). Tra i prodotti più esportati, invece, le mele (+5,74%, oltre 881 mln), l'uva da tavola (+1,2%, 729 mln), i kiwi (+2,63%, 473 mln). Tornano a crescere anche pesche/nettarine con (+26,53%, 137,4 mln), arance (+5,37%, 113,8 mln), pere (-10%, 106,4 mln) e limoni (-19,3%, 66 mln). Tra i prodotti più importati si confermano banane (-3,87%, 430,5 mln) e ananas (+8,7%, 97 mln).

ITALIAN COFFEE WILL NOT BECOME UNESCO'S INTANGIBLE HERITAGE OF HUMANITY

The Italian Espresso Coffee will not become UNESCO's Intangible Heritage of Humanity. After a long journey characterized by many difficulties, the UN's body national commission has rejected the bid. Which was for "Italian espresso coffee in culture, rituals, society and literature in emblematic communities from Venice to Naples". However, the panel said the Italian art of opera would go forward as candidate to present to the UNESCO intergovernmental committee for the 2023 cycle. Notwithstanding the negative result, the UN's body informs that the dossier was still very appreciated by the members of the commission.

L'Unesco bocchia la candidatura del caffè italiano a patrimonio immateriale dell'umanità

Niente da fare per la candidatura dell'espresso italiano a patrimonio immateriale Unesco. Dopo un lungo percorso costellato da non poche criticità, è arrivato verdetto sfavorevole da parte della Commissione nazionale per l'Unesco, che ha bocciato la candidatura del "caffè italiano espresso tra cultura, rituali, socialità e letteratura nelle comunità emblematiche da Venezia a Napoli". Approvata invece la candidatura dell'arte italiana dell'opera lirica, che sarà quindi presentata al Comitato intergovernativo per il ciclo 2023. Nonostante l'esito negativo riservato all'espresso italiano, fanno sapere dal sito Unesco, il dossier è stato comunque molto apprezzato dai membri del Direttivo.

INSECT FLOUR, THE FIRST CHIPS MADE IN ITALY LAUNCHED ON THE MARKET

For quite some time, the consumption of insects (and their derived products, like flour) has been considered as a potential dietary solution for the future. And for this reason, Fucibo, the Italian company which specializes in the segment, has decided to launch a line of chips made in Italy produced with insects that have been authorized by the European Community. The product consists of extruded corn chips cooked in the oven, which entail insect flour with the objective of lowering the fats' content and making the snack richer in proteins. At the moment, the available flavors are pizza and cheese. "In 2022, we will launch other products like pasta, biscuits and crackers to eventually work on developing other ideas we already have", explains Davide Rossi, Fucibo's cofounder.

Farine di insetti, pronte le prime chips di produzione italiana

Da diverso tempo il consumo di insetti (e dei derivati dalla loro lavorazione, come la farina) viene indicato come potenziale soluzione alimentare per il futuro. È per questo che Fucibo, azienda italiana specializzata nel settore, ha deciso di lanciare una linea di chips made in Italy realizzate con farine di insetti autorizzate dalla Comunità Europea. Si tratta di uno snack di mais cotto al forno che integra, appunto, farina di insetti, con lo scopo di diminuire il contenuto di grassi e rendere lo snack più proteico. Sono al momento sono disponibili nei gusti formaggio e pizza. "Nel 2022 usciranno con altri prodotti come la pasta, i biscotti e i crackers per poi dedicarci allo sviluppo di altre idee a cui stiamo lavorando", commenta Davide Rossi, cofondatore di Fucibo.

GRANA PADANO PDO'S EXPORT INCREASES BY 7% IN 2021

The exports of Grana Padano PDO's have grown 7%. According to the Consortium, it is the best result reached in the last decade, second only to the 2015 performances. In December 2021, the PDO scored an increase by 5.14% over the same month in 2020. And in the 12 months of 2021, the exports grew overall 7.07%. It means that 2 million and 240,000 Grana Padano PDO forms – which equal to 44% of branded products – have been shipped overseas. The main destination is Germany, that scores a 3% growth compared to 2020, followed by France. The US market with 171,000 forms reached almost a +15%. Spain comes sixth (+4%). The best result in 2021 has been registered by Belgium, which scored +22.23% and 97,000 forms sold, thus ranking seventh. The UK, instead, decreases by 11%, and it remains in fifth position at 127,000 forms.



L'export di Grana Padano cresce del 7% nel 2021

Crescono del 7% le vendite oltre-confine di Grana Padano Dop. Secondo quanto rivela il Consorzio, è il miglior risultato export nell'ultimo decennio, secondo solo al 2015. A dicembre 2021 la Dop ha messo a segno un incremento del 5,14% rispetto allo stesso mese del 2020. E nei dodici mesi del 2021 le esportazioni sono aumentate in tutto del 7,07%. Significa che 2 milioni e 240mila forme di Grana Padano, pari al 44% di prodotto a marchio, hanno varcato i confini del Bel Paese. Sono state spedite, prima di tutto, in Germania, che segna una crescita di quasi il 3% rispetto al 2020, seguita dalla Francia. Il mercato degli Usa con 171mila forme ha guadagnato quasi il 15% in più. In sesta posizione la Spagna che avanza del 4%. Il miglior risultato nel 2021 è quello registrato in Belgio, con un progresso del 22,23% e 97mila forme vendute che lo colloca in settima posizione. Perde, invece, l'11% il Regno Unito, che resta in quinta posizione a quota 127mila forme.



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MURGELLA

Since 1957 the Palazzo family has been producing dairy products in the traditional way with whey starter culture, so that you can enjoy the natural and authentic flavour typical of the Murgia Area in Puglia (Italy).

ZOOM

Marketplace: a gateway to the future

What opportunities do big e-commerce platforms offer to food & beverage manufacturers? A web conference organized by BrandOn Group, in partnership with Alimentando.info, tried to figure it out.



BATASIOLO: "IT'S A BIG STEP, BUT THAT BRINGS GREAT OUTCOMES"

Yari Tarantino, head of sales for Italy and e-commerce
"Together with BrandOn we have approached the online platform business for two main reasons. The first is the structure of our winery, in terms of vine hectares and production volumes, which allows us to support the demand of marketplaces like Amazon. The second is the historical moment we are living, characterized by the surge of the online sales. Although 2021 was the first year for us, this channel is already giving us great satisfactions."

PASTA GAROFALO: "MARKETPLACES CAN BE AN INCOMPARABLE SHOWCASE"

Maria Elena Esposito, digital marketing manager
"We have always adapted our product offer according to the different sales channels we supply. In Italy, for instance, in addition to our own online shop we have created a brand store on Amazon, which we mainly use as a source of visibility. Here, we communicate with video and display campaigns to a very wide user base. In the United Kingdom, instead, we have a branded shop on Ocado, one of the country's largest e-commerce platforms and where we can boast a 40% share in the pasta segment, with 93 products available."

Amazon, E-Bay, Alibaba, just to mention some 'big players'. But also Ocado in England, Metro in France or Kaufland in Germany. The universe of e-commerce platforms, b2b or b2c, discloses great business opportunities for companies that decide to focus on this (relatively) new sales channel. Which was the focus of a web conference organized on the past weeks by BrandOn Group - Italian e-commerce enabler - and dedicated to food & beverage. The event was enriched by the speeches of Angelo Frigerio, CEO of the media partner Alimentando.info; José Rallo, member of the Board of the Italian Trade Agency (ITA) and CEO of Donnafugata; Pierpaolo Alberici of Vivino.com; the digital marketing manager of Pasta Garofalo, Maria Elena Esposito; Yari Tarantino, head of sales for Italy and e-commerce for Batasio; and Rosario Scarpato, founder and director of Italian Wine Crypto Bank. Moderator was Paola Marzario, founder of BrandOn Group, who also provided a comprehensive overview of how this promising (yet complex) market is evolving.

Taking stock of the e-commerce

After the boom recorded in 2020, due to the outbreak of the pandemic, in 2021 the e-commerce business experienced a remarkable consolidation: in December

GLOBAL E-COMMERCE IN 2021

+5%
online sales (Dec
2021 vs. Dec 2020)

62%
of consumers
using Amazon as a
research engine

78%
of all US brands
selling on Amazon

**Amazon & E-Bay
are the most visited
e-commerce
platforms in the
world**

Source: Agenda Digitale,
Feedvisor, 2022 Trends and
Predictions for e-commerce,
Statista



2021 sales increased by +5% over December 2020. "62% of world consumers now use Amazon to get information on products, like a research engine, and not just for buying," Paola Marzario explains. "78% of American brands, instead, use it as a business tool." And in Italy? With some delay, also here people have finally started to talk about a 'marketplace economy'. "Amazon is the undisputed leader in Italy too, with 43 million unique visitors per month," Marzario underlines. "There are, on average, 32 million Italians who connect every day, of which 70% through a smartphone." As regards business, over 45% of Italian companies are now present on an online marketplace.

Analyzing in detail the food & wine sectors, around 7.8% of the over 8 trillion dollars that make up the global food market come from online sales. Around 1 trillion is generated in Europe, where nevertheless the situation varies greatly from country to country: if about 14.4% of food sales in the UK take place online, in France this percentage stands at 3.4%, in Spain at 3% and in Italy at 0.3%. As for wine, online sales account for 4% of all sales on the Italian market (for a value of 14.2 billion euros), with an estimated CAGR of 7.9%. This, in a future perspective, places our country in

THE ITALIAN SCENARIO

32.2
million people are
connected every day

70.9%
of consumers
connect through a
smartphone

45%
of Italian
companies sell
on a marketplace

Il futuro è nei marketplace

Amazon, E-Bay, Alibaba. Solo per citare alcuni big player mondiali. Ma anche Ocado in Inghilterra, Metro in Francia o Kaufland in Germania. L'universo delle piattaforme di e-commerce, b2b o b2c, schiude enormi possibilità per le aziende che decidono di scommettere su questo nuovo canale di vendita. Che è stato al centro di un evento in streaming organizzato da BrandOn Group con la partnership di Alimentando.info e intitolato 'Il marketplace del Food & Wine'.

second place, in Europe, after France (20.7 billion) and before the UK (now second with 15.8 billion).

The future of food & beverage goes through the online channel

The importance of 'being online' has never been more evident than in recent years, characterized in order by a pandemic and a war, as well as a series of correlated problems in the global supply chains, among transport difficulties and shortage of raw materials. Last but not least, the surge in energy costs and the inflation, with its corrosive effect on profits. "At the beginning of March Alimentando.info carried out a survey on a panel of 150 Italian f&b companies to seize the impact of these problems on their activities," Angelo Frigerio, CEO of Alimentando.info explains. "A tragic picture emerged. And if this same survey was conducted today, results would probably be even worse. For commodities and packaging materials, to the shortage adds a general increase in costs, also driven by speculation. Furthermore, for 60% of respondents energy costs increased by between 40 and 50%."

It is worth noticing that, in spite of it all, for 30% of companies 2022 will end with a slight growth, while another 24% expect steady results. "In this context," Frigerio adds, "it is more im-

portant than ever to boost all tools and channels, starting from exports and marketplaces. In other words, those that allow companies to skip intermediaries and enter, directly, in new markets." An opinion shared also by José Rallo, CEO of the Sicilian winery Donnafugata and member of the Board of the ITA Agency for the internationalization of Italian companies, that since 2015 has been actively supporting their digitization. "For SMEs, this is not an easy path to walk alone", José Rallo explains. "ITA is able to protect companies also through specific agreements: around 30 are already in place with some of the world's leading e-commerce platforms including Amazon, Alibaba and Jd.com. The goal for 2022 is to sign 10 more and take on board an even larger number of companies."

Wine: from e-commerce to cryptocurrency

Specifically in the wine sector we have witnessed, in recent years, the birth and growth of some specialized platforms. An example is certainly Vivino.com, US giant established in 2010 and which today boasts a community of over 50 million users in 17 countries (about 3.5 million users in Italy). First born as a mobile app, Vivino.com became an e-commerce platform five years later. "And starting from 2020, with the

pandemic, the business has literally exploded," the marketplace success manager of Vivino, Pierpaolo Alberici, highlights. "For companies, it takes very little effort to be on our platform but it discloses great opportunities. We get to know our customers very well and this allows for personalized communications, which perfectly combine supply and demand."

Hence, wine e-commerce is not much a project to pursue, but rather a well-established reality, also in Italy. There are instead other unexplored frontiers of digitalization on which the sector is moving. An example of all, the often named - but perhaps still poorly understood - NFT (Non Fungible Token). That is to say, special types of tokens that make up the certificate of authenticity and ownership - through blockchain - of a particular good, like wine. Rosario Scarpato and his team have recently founded the Italian Wine Crypto Bank, the first company in the world to have tokenized wine. "Our goal is to give cryptocurrency holders the opportunity to diversify their investments by purchasing fine wines, to consume them or as a form of investment," Scarpato explains. "With 'Catch 22' we have created the first NFT wine collection in the world: 22 rare magnums from 22 different Italian wineries where each NFT in the collection celebrates a great wine."

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FOCUS ON

Italian consumers? They don't differ much from Europeans

The research 'Conscious Eater' by NielsenIQ analyzes dietary habits in five countries. 37,000 families across Italy, Spain, Great Britain, Germany and France were under the spotlight.

In the research 'Conscious Eater', NielsenIQ analyzes dietary habits and how they influence consumer purchasing habits in five European nations. The over 37,000 families involved in the survey across Italy, Great Britain, Spain, Germany and France have enabled to go into more detail on the nutrition industry, thus demonstrating that Europeans' choices are so different yet so alike. The focus on 'green' and 'ethical' consumers unveils the effort put into environmental protection by the Italian and European families.

Food plays a big part in Europeans' lives

Among the five European countries involved in NielsenIQ's study, Italy ranks first as far as food importance is concerned. In fact, 92% of the surveyed families affirm that food plays a big role in their daily life. Spanish families follow with 87%, and immediately after comes France with 79% of interest. Namely, one Italian, Spanish and French family out of two prefers their national cuisine, whereas UK and Germany's families are more open to foreign flavors and specialties.

Checking products' labels

When they go grocery shopping, almost 36% of the Italian families spend time reading food products' labels in order to check the ingredients. The figure is smaller when compared to French and Spanish consumers, who happen to be the most keen on doing so. Respectively, 42% and 44% of the families actually take their time to read the products' labels. According to NielsenIQ's data, the lowest percentage, and therefore the last place in the chart, belongs to UK consumers (23%), immediately preceded by the Germans (30%).

Food sustainability and the environment

Italian consumers claim to be less sensitive to topics related to sustainability and rank last in the European chart. Indeed, only 11% of the Italian families state they eat following a specific dietary regimen since it is more sustainable and thus reduces the environmental footprint. Italy is preceded by Spain with 14% and by Great Britain, scoring 17%. According to NielsenIQ, the countries that are more aware of these topics are France and Germany, which respectively register 20% and 30% of interest towards eating consciously in order to safeguard our planet.

Different diets

The piece of research carried out by NielsenIQ pinpointed different types of consumers across Euro-

pe, which are called 'Conscious Eaters'. There are uninterested families, which do not consider food and nutrition as a priority, and then there are families that keep up with trends and opt for niche diets or, then again, some families stick to specific dietary plans in order to contribute to their psychophysical well-being. The survey also highlights the 'green' consumer segment, which chooses organic options and it embraces families which make ethical-driven purchase choices to reduce their carbon footprint.

'Green' consumers

The European families that opt for a diet that bases on the rhythms of nature are generally older and they prefer to eat seasonal and fresh foods, made of natural ingredients, without additives or GMOs. Of course, the food has to be organic as well. All these characteristics are considered a quality guarantee. Local and national products dominate the dinner tables of this type of consumers, who also support their own culinary tradition. In Italy, unlike the other countries involved in the research, two very different consumer profiles stood out: the 'naturals' (15% of the Italian families), who are more concentrated on not very refined or non-industrial ingredients in order to eat a healthier and more sustainable diet; and the 'rooted' (13%), which are more tied to the Italian cuisine and regional products, synonyms for freshness and taste.

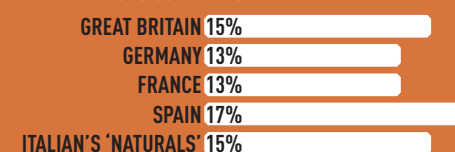
'Ethical' consumers

In the so called ethical families, conscience drives dietary choices, looking for reassurance in sustainability certifications of the products they buy, guarantees of ingredients' origin, as well as animal welfare standards. Reducing meat consumption is a very common trend in Europe and the frontrunner is Germany, which claims that it primarily wants to reduce the consumption (34%), that the intake should be occasional (27%) and that the animals' wellness should be guaranteed (26%). In Italy, 31% of the families try to limit their meat consumption and about 2% claims to follow strict vegetarian diets.

Luigi Rubinelli



THE PERCENTAGE OF 'GREEN' FAMILIES IN THE VARIOUS COUNTRIES



ITALIAN ETHICAL FAMILIES AMOUNT TO 5%, LESS THAN ALL THE OTHER COUNTRIES INVOLVED IN THE SURVEY



Source: NielsenIQ

Il consumatore italiano? Non è molto diverso da quello europeo

NielsenIQ nella ricerca 'Conscious Eater' analizza in cinque paesi europei le abitudini alimentari e come queste influenzano il comportamento d'acquisto dei consumatori. Oltre 37mila famiglie coinvolte nel sondaggio tra Italia, Gran Bretagna, Spagna, Germania e Francia hanno permesso di entrare nel dettaglio del settore nutrizione dimostrando come gli europei nelle loro scelte siano tanto diversi quanto simili. Il focus sui consumatori 'green' ed 'etici' rivela l'impegno a tutela dell'ambiente delle famiglie italiane ed europee.

SQUISITO IN TUTTE LE SUE FORME



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DELI MEATS

www.lefamigliedelgusto.com

Le Famiglie del Gusto: all for one, one for all

Passion, strong traditions and a strive for innovation are the hallmarks of the network that embraces four Italian family-run companies, specialized in delis for over 50 years. New launches and market trends. Interview with Costanza Manzini, export manager.

With 10 production sites and 360 employees total, Le Famiglie del Gusto is a landmark of Italian deli meats. The foundation dates back to 2017. When three leading Italian cured-meat companies - the Verona-based Coati, Felsineo in Bologna and San Michele, which is headquartered close to Crema with production factories in Langhirano (Parma) - established a network in order to strengthen their presence on international markets. And in January 2022, it grew even further with the addition of Bordoni, which is based in Valtellina, Lombardy. All four companies are family-run and boast on average an over 50-year experience in cured-meat production. The Felsineo Group also added in the last years a meat-alternative offer, with their Company FelsineoVeg, fully dedicated to plant-based products.

The network is committed to providing international consumers with a wide range of both traditional and innovative delicacies. Pride, passion, and innovation beyond tradition are indeed the hallmarks of Le Famiglie del Gusto. We talked about all this and so much more with Costanza Manzini, export manager.

Let's start from the beginning, how does Le Famiglie del Gusto come about?

Le Famiglie del Gusto was founded six years ago by now. When three Italian deli-meat producers, San Michele, Felsineo and Coati, decided to cooperate as a network in order to establish and further strengthen their presence on international markets. Moreover, last January Bordoni joined us, thus becoming the fourth member. All the companies share a similar philosophy, including pride in their work, passion for their products and a strong Italian tradition passed down through generations. All firms are family-run, in their third or fourth

generation, and have been operating in the segment for over 50 years.

What is the added value that derives from the collaboration?

Each member is specialized in the production of a cured-meat product or a small selection of charcuterie. Coati produces mainly cooked ham, salami, speck and pancetta; San Michele focuses on Prosciutto Crudo, Parma PDO and San Daniele PDO; Felsineo is well known for its Mortadella and Mortadella Bologna PGI; and lastly Bordoni has a strong tradition in Bresaola production. The general offer is enhanced by the plant-based products of FelsineoVeg. Hence, the network provides the international consumers with a complete range of exceptional high-quality delicacies. The biggest advantage lies in the fact that the four companies exist per se, but also work in complete synergy as if they were one big entity. Thus, our clients may interact with a single company but they actually get the best from all four of them. And through know-how and passion for our delis, every day we are able to adapt our wide range of products according

to the market and customers' specific needs. This is our real strength.

How much does export account for on the total turnover?

On a total turnover of 260 million euro from all four companies, exports account for over 40 million euro in 2021.

Which are the main export destinations?

We mainly export our products across all Europe. Which is the primary market for Italian delis. Moreover, other main export destinations for our products are the UK, Canada, the USA, Chile, South Africa, New Zealand, Middle East and many other.

Where are your products distributed internationally?

Having 10 production sites and our own slicing facility enables us to cover almost all distribution channels on foreign markets. This way we can provide the large-scale Distribution with pre-sliced trays, the Horeca channel and the industry with whole bars.

And which are the best-selling products on international markets?

Prosciutto Crudo and Parma PDO have always been leading products on international markets. Followed by Salami, cooked hams, Mortadella and Pancetta. The demand for Bresaola, which is considered a premium product, is growing. Also because it falls within the healthier consumer trend.

Indeed, you also have a range of plant-based delis...

Exactly, Felsineo has a dedicated production site for plant-based delis, which complete our traditional cured-meat range. Namely, FelsineoVeg comes mainly with two lines. The first created cereal and legumes line and the other one, which is currently giving the best results in the international markets, our meat-sounding line, reproducing the conventional delis' taste.

What have you been working on recently?

In the last two years, due to the pandemic the consumption of packaged deli meats has significantly increased. And it is precisely why we have been working in this

direction to provide our customers with many alternatives. Which range from smaller pre-sliced free service 80-gram packs through the take away 120-gram format to the premium line of wavy sliced. Moreover, we have recently introduced a julienne cut Bresaola into our deli offer.

Which trade shows are you attending this year?

As a network, we take part in international events. We have just attended Wabel and the PLMA Global online, and we will be at PLMA in presence in Amsterdam at the end of May. And then in October we will attend SIAL in Paris.

Lastly, how would you describe Le Famiglie del Gusto in three words?

This is easy. If I were to sum up our philosophy in three words, I would say strong traditions, passion and innovation. The know-how handed down over generations, combined with our passion and the strive for modernization are the only way to keep the families' traditions alive.



Le Famiglie del Gusto: l'unione fa la forza

Passione, forti tradizioni italiane e innovazione continua. Sono questi i segni distintivi della rete d'impresa Le Famiglie del Gusto. Nata nel 2017 dall'unione di tre aziende famigliari italiane, specializzate nella produzione di salumi da oltre 50 anni: Coati, Felsineo e San Michele. A cui se ne è aggiunta recentemente una quarta, la valtellinese Bordoni. L'obiettivo: consolidare la propria presenza e facilitare gli scambi sui mercati internazionali. Ad oggi, la rete opera come se fosse una grande azienda in tutto e per tutto. Offrendo ai consumatori esteri un ampio assortimento di prodotti di elevati standard qualitativi della tradizione, e non solo, anche attraverso un'offerta di alternative vegetali.



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

The Quality with Love

FOCUS ON

58%

73%

The new challenges of food&beverage

Trends and prospects of the agrifood segment at the core of the workshop by Cerved. In order to enable companies to better face the complex Italian and international situation, characterized by ever-growing production costs and the rising inflation.

Resilient segment par excellence, the agrifood once again proved to be one of the main pillars of the made in Italy during the pandemic, supporting the re-start of other economic segments and coming out of this situation even stronger. However, today the rise in energy and raw material prices, which continue to hold the stage among the operators of the segment, aggravate the situation as never before. Hence, it is natural to wonder how consumptions will change and what are the main trends at the moment, in order to understand how the sector will evolve. This discussion took place during the event Cerved Marketing Intelligence 'Trends and prospects of the f&b market - A pillar of made in Italy'. The workshop illustrated how to understand the structure and the dynamics of a strategic segment for our economy. An event to share the view by Cerved on the market and the drivers of the growth and to try and answer together with the main experts of the sector to the most current

questions: what is the state of the food&beverage companies in Italy at the moment? What will the raw materials' shock entail? How to decarbonize and face the costs of the future? Which are the main ingredients for a growth in the segment in 2022?

The raw materials' shock

The energy crisis has caused soaring prices of raw materials which impacted on the companies' costs. Supply chain shortages from distant markets, due to both lack of raw materials and unsustainable transportation costs, have led to a series of increases

Le nuove sfide del food&beverage

Al centro del workshop di Cerved le tendenze e prospettive dell'agroalimentare. Che si è confermato uno dei pilastri del made in Italy durante la pandemia, supportando la ripartenza di altri comparti economici e uscendo da questa situazione ancora più forte. Ma su cui oggi pesano come non mai i rincari di costi energetici e materie prime, che continuano a tenere banco tra gli operatori del settore. Per consentire alle imprese di affrontare al meglio la complessa situazione italiana e internazionale, Cerved ha illustrato come comprendere la struttura e le dinamiche di un comparto strategico per la nostra economia.

which companies can barely manage and they will lead to a rise in the prices.

Sustainability and ESG: which are the effects?

The green transition will require heavy investments by many companies of the segment in order to convert its production to processes which are more compatible with a net-zero greenhouse gas emissions economy. Not all f&b firms will be able to support this process, which could open up to a new season of M&A. The sustainability transition, for many other companies, will instead represent an opportunity

to make a technological leap: numerous firms have already been working on water consumption, others on the electricity and methane gas use and they are implementing ESG instruments to certify their level of sustainability. Choosing a technology which cuts CO2 emissions, but at the same time does not thermally stress the mechanisms, indeed preserves the quality of the sector's products.

The growth's ingredients

Cerved's event has given an overview of the field but even strategic recommendations in order to find the right recipe for growth. Which can happen through five challenges: the business transition, where knowing the markets becomes fundamental; the digital transition, which affects production, commercial and marketing systems; the skill-related transition, crucial not only on a management level but also distributed; the green transition; the ability of the companies to tackle the financial transition.

LIMITED IMPACT OF THE PANDEMIC, WITH SIGNIFICANT DIFFERENCES AMONG THE SEGMENTS

Impact on sales*

Revenue trends, EBITDA and market shares at a loss, 2020

	Revenues 2020/2019	EBITDA 2020/2019	Companies at a loss 2020 (%)
Agriculture	2%	6.8%	37%
Livestock	-2.2%	-12.1%	34.7%
Food	-0.1%	1.8%	33.3%
Beverage	-4.4%	-6.1%	43.4%
Distribution	1.2%	6.7%	24.7%
First processing	4.3%	26.3%	20.1%
Food&beverage	0.8%	4.7%	28.9%
Italy	-8.9%	-16.5%	32.8%

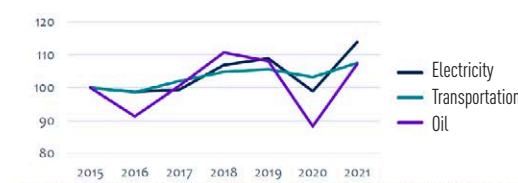
*A sample of almost 775K limited companies with 2020 financial statement deposited

Source: 'Trends and prospects of the f&b market - A pillar of made in Italy' by Cerved

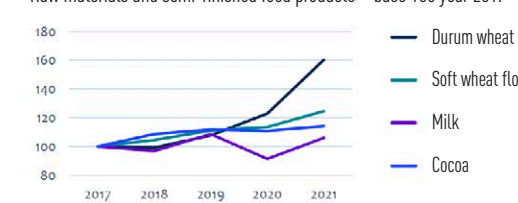
COSTS' TENSION AND REPERCUSSIONS ON MARGINS AND PRICES

COSTS' TRENDS

Raw materials and transportation - base 100 year 2015



Raw materials and semi-finished food products - base 100 year 2017



1 TENSION ON MARGINS

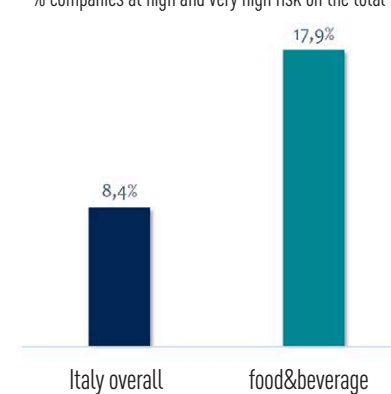
2 EXPECTED SIGNIFICANT RISE IN PRICES IN 2022

Source: 'Trends and prospects of the f&b market - A pillar of made in Italy' by Cerved

THE "MUST" OF SUSTAINABILITY

COMPANIES AT TRANSITION RISK

% companies at high and very high risk on the total*



*Analysis carried out on 683,000 limited companies

POTENTIAL INDEBTEDNESS TO SUPPORT THE ECOLOGICAL CONVERSION

Companies of the f&b segment with margins of indebtedness under conditions of economic-financial balance and indebtedness value (€)

Companies at transition risk	14,378
Not ready to get into debt	9,268
Ready to get into debt	5,110
Investment potential (€)	1,2 bln

Source: 'Trends and prospects of the f&b market - A pillar of made in Italy' by Cerved

IN THE FUTURE WE EXPECT A STABILIZATION OF THE MARKET'S GROWTH

Predictions based on turnover

	2022/2019	Driver
Agriculture	9.2%	Supply chain's certifications, traceability
Livestock	0.6%	Supply chain's certifications, sustainability
Food	4%	Made in Italy, traceability, safety
Beverage	4.6%	Innovation, sustainability, link to the territory
Distribution	6.4%	Omni-channel view, territorial proximity, digitization
First processing	14.6%	Made in Italy, sustainability
Food&Beverage	6.3%	Made in Italy, traceability, sustainability, safety
Total economy	3.7%	

Source: 'Trends and prospects of the f&b market - A pillar of made in Italy' by Cerved

A SUPPLY CHAIN WORTH 464 BILLION EURO HIGHLY ROOTED ACROSS THE NATIONAL TERRITORY

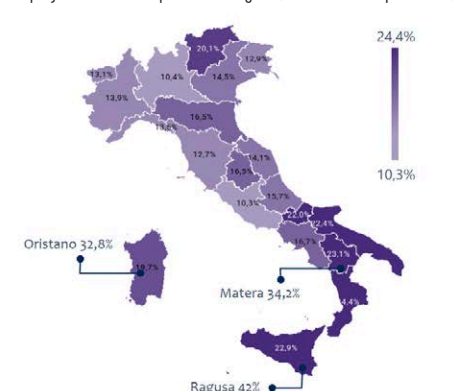
THE SUPPLY CHAIN'S DIMENSIONS

Number of employees and market's value of the f&b's segments

	Employees ('000)	Market's value (€ bln)
Agriculture	688	29.2
Food	447	125.3
Livestock	130	9.6
Beverage	144	22.0
Distribution	877	307.4
First processing	72	36.7
Food & beverage	2,144	463.8

TERRITORIAL SPECIALIZATION

Number of employees in the food&beverage out of the total employees in the companies for region (and first three provinces)



Source: 'Trends and prospects of the f&b market - A pillar of made in Italy' by Cerved

STRONG AND CONSOLIDATED VOCATION TOWARDS THE EXPORT OF MADE IN ITALY'S SPECIALTIES

THE COMPANIES' INCLINATION TOWARDS EXPORT

% of firms out of the total based on the Foreign Market Score*

Total economy	27.0%
Food & beverage	34.9%
Beverage	56.4%
Food	40.1%
First processing	36.2%
Distribution	35.5%
Agriculture	27.6%
Livestock	8.0%

*The Foreign Market Score is Cerved's index which estimates the companies' inclination to operate on international markets
** Partial export values, October 2021. Source: ISTAT

DESTINATION MARKETS

Destination markets for Italian f&b products based on value

	Export's value 2021 (bln €) **
Germany	7.4
France	5.4
USA	5.4
UK	3.8
Spain	2.0
Total	52.1

Source: 'Trends and prospects of the f&b market - A pillar of made in Italy' by Cerved

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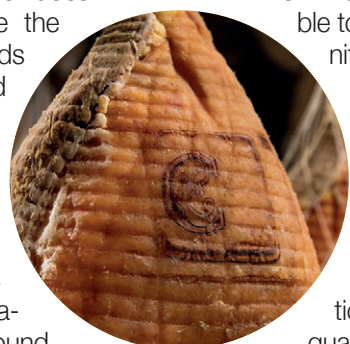
www.culattaemilia.com

INSIGHT

Culatta Emilia: different is beautiful

One of the most authentic Italian delis is today guaranteed by a new Consortium. Whose aim is to protect and promote a cornerstone of the Emilian charcuterie around the world. As well as encourage producers to enhance their individual, unique features.

Finally, on 15th December 2021, the official constitution act of the new Consortium for the Protection of Culatta Emilia was signed in Parma. An important milestone for a Consortium (formerly Association of Producers) that has already gained a primary space within the Italian charcuterie sector and aims to follow a novelty path on its mission. In fact, the Consortium for the Protection of Culatta Emilia doesn't want to replace the individual brands of associated companies - that with their skills and unique features are the real 'engine' behind its success - but rather spread, around the world, the knowledge of this typical, completely natural deli, made with 100% Italian meat and without any addition of preservatives. Characteristics perfectly in line with the choices of modern consumers and thus more and more requested by both modern distribution and Horeca professionals, also entering the private label assortments of major high-quality distribution chains. In 2021, Culatta Emilia reached the unexpected threshold of 102,000 pieces manufactured.



vered with a mixture called 'sugna' to maintain its softness and to better adapt to the mild winds of the Emilian hills. The production area is limited to the 3 Emilian provinces of Parma, Piacenza and Reggio Emilia. Only a few, natural ingredients are needed: 100% Italian pork and salt, with the addition, at the sole discretion of each producer, of spices, natural flavors and possibly garlic and white wine. It is not possible to add nitrites and nitrites, artificial flavors, dyes or chemical additives. The result is a product suitable for the whole family, with great nutritional values and qualities. The long, natural aging in the cellar has to last for more than 12 months. The 'Culatta Emilia' collective brand is the confirmation that the whole process has been carried out according to the rules, supervised by an external accredited control body with the guarantee and signature of each producer. Easy to slice and with very little waste, from the very first slice Culatta Emilia enchants the senses thanks to its irresistible aroma as well as the sweet and refined taste.

Same, but different

Truly Italian, 100% natural
Culatta Emilia is a historical product of the Emilian charcuterie, made with the noblest core part of the Prosciutto, protected by the rind and co-

Currently, the Consortium for the Protection of Culatta Emilia is made of 27 members, of which 15 producers, and day after day new companies are asking to join it, convinced by

the clarity of the intent and the success of the product. Already in 2018, the producers of Culatta Emilia had enforced the registration of the collective brand after they created the Association of Producers in 2017: a project that started, first of all, from the passion for this historic Emilian product and from the desire to protect and promote it. The success achieved in the last 5 years is astonishing, and led the Association to take the important step of finally turning into a Consortium.

The most interesting paradigm shift consists in proposing, as the primary value of Culatta Emilia, the unique diversity of each producer as an essential compendium to the disciplinary guarantees. Hence, since every Culatta is different according to the specificities given by each producer, the producer code is shown on the rind in order to give consumers the possibility of choosing the Culatta they prefer, among a variety of distinctive flavors.

"Every aging cellar contains a story that remains imprinted on the product, every selection of raw materials reflects the experience and taste gained by skilled hands, every expert and delicate ageing creates unique flavors and aromas that cannot be found elsewhere," the Consortium explains. "The naturalness and the long maturation give the Culatta Emilia a diversity of gastronomic experiences that, we hope, will be its most typical and precious value."



Consequently, if the Consortium will promote the knowledge of the product and enforce a control system managed by an impartial external body, it will also encourage the freedom of each producer to create his own and unique Culatta Emilia, dedicated to a specific market segment. For that reason, the name of the producer shall be put forward in labelling as prominently as the collective brand.

The offer of Culatta Emilia will be therefore diversified also in different price ranges, depending on the distinctive quality of the raw material, the specificity of processing and the immense variety of choices and particularities of each producer. "Enhancing the individuality of the producer", the Consortium highlights, "means transparency, responsibility, prestige and value for the whole sector."

Culatta Emilia: diverso è bello

Finalmente, il 15 dicembre 2021, è stato siglato a Parma l'atto costitutivo del nuovo Consorzio di tutela della Culatta Emilia. Un importante passo per un Consorzio (prima Associazione di Produttori) che punta a tutelare la qualità e promuovere la conoscenza di questo salume tipico della tradizione italiana, più precisamente emiliana, nel mondo. Incoraggiando allo stesso tempo gli associati a personalizzare, nella ricetta e nella stagionatura, le loro produzioni per renderle uniche e adatte ai più svariati canali distributivi e gusti dei consumatori.

ITALIA BULGARI marshmallow



...TO THE MOON AND BACK





THE COMPANY

www.thebridgebio.com

The Bridge brims with authenticity



Passion, innovation and sustainability. These are the landmarks of the first Italian manufacturer of 100% organic and vegan drinks. In an interview with Eva Pfeffer, sales & marketing director, we discussed new launches, market trends and international consumers' requests.



Nestled in the small village of San Pietro Mussolino (Vicenza), in the verdant paradise of the Lessini Mountains plateau, the story of The Bridge dates back 30 years ago. It was 1994 precisely when Ernesto Negro Marcigaglia, who had been manufacturing leather gloves for a living alongside his spouse Margherita, took his first ever sip of an American vegan drink and immediately recognized the potential such a product might have had onto the Italian market. Indeed, through hard work and know how his brilliant intuition turned soon into a very successful business venture. Over time, The Bridge has branched out into providing consumers with a wide range of vegan, lactose and cholesterol free options, including desserts and cooking creams. Notwithstanding its ever-growing business capacity, the core of the company still lies with its familiar character. Today, The Bridge is run by Paolo and Marco, Ernesto's sons, together with their mother Margherita. In an interview with Eva Pfeffer, sales & marketing director at The Bridge, we discussed the newest launches, R&D investments and international consumers' preferences.

Are you planning any new launches?

The latest novelties we launched are Soya Drink Barista, Soya Drink Cacao and our Oat Cooking Cream in a new 1L format, which is perfect for the Horeca segment. In addition, we have opened up to a completely new section. Indeed, we will launch a new line of 100% vegan and organic yoghurts. Currently, we are doing industrial tests on three different bases: coconut, soy and almond. We are working on several natural and fruit flavors and plan to

be ready for the launch in autumn 2022.

And what about ingredients?

All our vegetal drinks are made with at least 80% spring water coming directly from the mountains of our tiny little village, and approximately 20% raw materials. Which are selected according to high quality and traceability standards.

Where do you get them?

The vast majority of our ingredients are produced in Italy, with the exception of some like quinoa and coconut, for which there is not enough raw material available in our country. For instance, our rice is cultivated in Piedmont and Lombardy. Oats in Tuscany, soy in Emilia Romagna, hazelnuts in Lazio and almonds in Sicily.

Who is your target of consumers?

Our main target has changed a lot over time. At the beginning, it was mainly composed by vegetarians, vegans, as well as people who had specific intolerances or allergies. Today, our target has definitely widened. And now it includes people with an interest in sustainability and in a healthy life style. The so called 'flexitarians', that is consumers who alternate their usual diet with vegan and plant-based options as they are discovering and realizing that they can prepare tasty recipes

even without using animal-derived ingredients.

Do exports heavily impact on total revenue?

They account for 80% of our total turnover. And we export in more than 70 countries worldwide. The top destination markets are France, Hungary, Switzerland, the UK and Israel. Moreover, as far as distribution channels are concerned, although there are country specific differences, our products are generally sold in all channels internationally.

Let's talk about your best-selling products across foreign markets.

The preferences regarding recipes, flavors and the base of the products normally vary according to the habits of each culture and country. Last year, our oat products have seen an increase in sales worldwide. In Northern countries especially our Barista range is the fastest growing category. Furthermore, in Europe rice and oat drinks are still very requested. Whereas in Asian, Arabic and Middle Eastern areas almond and soy tastes prevail. Apart from this, vegan cooking creams sell very well in those countries that use them in many preparations of their traditional cuisine.

And what are international consumers' main requests?

In general, our 1L format is the most requested. Moreover, even in this field sustainability is becoming ever more crucial. Our clients pay a lot of attention to new sustainable and eco-friendly solutions and ask for innovations. For France, for example, we have developed a 500 ml concentrate version of the best-selling 1L drinks. Which can be prepared at home by adding water. We explain on the packaging how much transport costs can be saved by adopting this solution.

What are the latest investments of the company in R&D?

Every day, we put a lot of effort into studying new recipes that could satisfy the constantly changing demands of our customers. In late 2020, through a 6-million-euro investment, we built a new production plant for the development and manufacturing of fresh products like yoghurts and other vegan options.

Have you attended any trade shows last year?

Due to the pandemic, the majority of the fairs in the previous years have been cancelled or postponed. The only show we could attend was Natexpo in Paris in September 2021. It was a good re-start, we had the chance to meet many clients we had not seen in months and collect new contacts. Moreover, we were able to present our new yoghurts.

And what's on the agenda for 2022?

The next trade show we are going to attend is Cibus in Parma. Then, we are going to be present at PLMA Amsterdam and Biofach in July in Nurnberg. In autumn, we will exhibit at Natexpo Lyon and at Sial Paris. As far as B2C events are concerned, we will be at Fa' la cosa giusta in Milan at the end of April.

The Bridge: un concentrato di autenticità

Passione, innovazione e sostenibilità. Sono questi i punti di forza di The Bridge, uno dei maggiori produttori italiani di bevande vegetali, 100% vegane e biologiche. Arricchiscono l'offerta dessert e creme per cucinare realizzate con ingredienti accuratamente selezionati e certificati. Situata a San Pietro Mussolino, nella splendida cornice dei Monti Lessini, in provincia di Vicenza, l'azienda si è ingrandita negli anni, conservando però sempre gelosamente il proprio carattere familiare. Le principali novità, tra cui una linea di yogurt 100% vegani e bio, gli investimenti in R&S e le preferenze dei consumatori internazionali. La parola a Eva Pfeffer, sales & marketing director.



PRODUCT SHOWCASE

FIND THEM OUT AT CIBUS 2022

Parma's food & beverage trade show is back from May 3 to 6. On display, the flagship products as well as the latest launches by more than 3,000 exhibitors. Here is an interesting selection for all tastes (and buyers): from savory bakery to sweets, from grocery to dairy and deli meats.

by Federica Bartesaghi

FIorentini Alimenti HALL: 6 BOOTH: E 022

www.fiorentinalimenti.it



SUPER PROTEIN CAKES

Florentini's Super protein cakes contain 24 gr of protein per 100 gr of product. They are also gluten-free and VeganOk certified, making them perfect for any diet, as a snack or as a bread substitutes, before or after sporting activity. Florentini's Super protein cakes are an excellent source of protein and are ideal for athletes.

Ingredients

Red lentil flour 90%, potato starch, sea salt

Packaging details

120 gr tubular pack

International certifications

Vegan OK, Gluten free

GRissin Bon HALL: 6 BOOTH: C 016

www.grissinbon.it



MINIFAGOLOSI PIZZA

New Mini Fagolosi breadsticks Pizza taste in an innovative snack package with 11 minipacks. Available also in Classic taste and Multigrain.

Ingredients

Wheat flour, extra virgin olive oil, tomato powder, yeast, iodized salt, barley malt extract, paprika powder, oregano, basil, dehydrated onion, malted wheat flour, natural flavourings.

Packaging details

165 gr flowpack (11 minipacks x 15 gr)

Shelf life

210 days

International certifications

BRC, IFS

ITALPIZZA HALL: 3 BOOTH: E 014

www.italpizza.it



26X38 MARGHERITA

Created for sharing: 26x38 is the rectangle pizza to share during happy times. 26x38 is the size of the typical baking tray where moms used to prepare their home-made rectangular pizza. The Margherita is Italpizza's best seller in Italy. The premium Mozzarella cheese and Italian tomato sauce makes this recipe an Italian masterpiece. Free from GMOs, free from palm oil, free from artificial colors and flavors.

Ingredients

Soft wheat flour, mozzarella cheese, tomato puree and pulp.

Packaging details

510 gr packaging made of carton, with an inner compostable plastic film.

Shelf life

18 months

International certifications

IFS food, BRCGS, UNI ISO 14001: 2018 and UNI ISO 45001: 2018

PRODUCT SHOWCASE · SAVORY BAKERY

F.LLI MILAN - LA MOLE

HALL: 6 BOOTH: D 028

www.la-mole.com



TARALLI

Discover the goodness of a typical Apulian recipe: only genuine ingredients and the best Italian extra virgin olive oil. Tasty and crunchy, perfect to be enjoyed at any time of the day.

Ingredients

Wheat flour, white wine, sunflower oil 14%, extra virgin olive oil 6%, salt.

Packaging details

200 gr squared base

Shelf life

12 months

International certifications

BRC, IFS

LA PIZZA+1

HALL: 3 BOOTH: C 050

www.lapizzapiuuno.it



PINSA AMBIENT

Crunchy outside and soft inside, it's a healthy taste explosion for all. Fresh and ready in 5 minutes, Pinsa ambient is made with sour dough, hand-processed and cooked on stone. To be enjoyed plain or stuffed.

Ingredient

Soft wheat flour type '00', water, re-milled semolina and durum wheat, sourdough (4.9%) (soft wheat flour, water), extra virgin olive oil (4.7%), salt, barley malt, soft malted wheat flour, gluten, yeast. Preservatives free.

Packaging details

150 gr, packaged in a modified atmosphere in paper-like flow pack wrappers.

Shelf life

15 days

International certifications

ISO 9001, ISO 22000, ISO 22005, IFS, Bioagricert.

DI MARCO CORRADO

HALL: 5 BOOTH: M 020

www.nuvolapinsa.com



NUVOLA AMBIENT

Nuvola Ambient is the first original Di Marco Pinsa Romana that can be kept out of the fridge. It is made with a mix of flours and sourdough that make it particularly light and digestible. After being hand stretched, the Nuvola Ambient bases are left to rise for 72 hours and then packaged in a modified atmosphere. The secret of Nuvola Ambient is the addition of a preservative that guarantees a long shelf life without temperature constraints.

Ingredients

Wheat, rice and soy flour and wheat sourdough.

Packaging details

230 gr

AMARELLI - FABBRICA DI LIQUIRIZIA

HALL: 6 BOOTH: H 033

www.amarelli.it



CLEMENTINE AND LIQUORICE JELLY CANDIES

Soft and delicious jelly candy with an intense taste, handcrafted, rigorously cut by hand and covered with sugar.

Ingredients

Liquorice jelly candies: sugar, glucose syrup, standardized pectin, natural liquorice extract, acidity regulator, citric acid. Clementine jelly candies: clementine from Calabria juice PGI, sugar, glucose syrup, gelling standardized pectin, acidity regulator: citric acid.

Packaging details

50 gr package

Shelf life

15 months

BISCOTTIFICIO VERONA

HALL: 6 BOOTH: G 028

www.biscottificioverona.com



KRUMIRI WITH CHOCOLATE

Typical butter biscuit, with chocolate dripping. Mustache shaped, as a tribute to Vittorio Emanuele, king of Italy.

Ingredients

Very simple recipe made of flour, sugar, butter, fresh eggs, vanilla and chocolate dripping.

Packaging details

140 gr box

Shelf life

12 months

International certifications

IFS, BRC

FIASCONARO

HALL: 6 BOOTH: H 40

www.fiasconaro.com



PANETTONE ORO DI MANNA

Flagship product of 'I Territoriali', the Panettone Oro di Manna celebrates the encounter between Gianduia chocolate and Manna cream and is embellished with a greedy coating of white chocolate and mannetti casting. A unique reinterpretation of panettone, thanks to the use of Manna, a sweet resin of biblical tradition.

Packaging details

Recyclable cardboard packaging with illustrations that recall the moments of the harvest and the craftsmanship of the ingredients processing process

Shelf life

4 months

PUGLIA SAPORI

HALL: 6 BOOTH: D 052

www.pugliasapori.com



GLUTEN FREE NUVOLETTE WITH GARLIC AND CHIVES

Just like their classic version, the new gluten free Nuvolette with garlic and chives are produced with a peculiar production process which keeps them crispy even if dipped in hot or oily dishes.

Ingredients

Rice flour, potato starch, chickpea flour, olive oil, salt, thickener: xanthan gum, natural flavor, aromatic herbs in variable proportion (thyme, chives, parsley), garlic.

Packaging details

Multipack cardboard box with 6 x 30 gr single portions inside

Shelf life

9 months

International certifications

BRC, IFS, FSSC22000, Bioagricert (organic)

VALLEDORO

HALL: 6 BOOTH: C 033

www.valledorospa.it



SCALITI WITH 'STORO' CORNMEAL

Tasty blown snacks, very light and with the typical taste of yellow cornmeal of Storo. The 'Storo' corn flour, typical of the 'Chiese' valley located in Northern Italy, is produced with a particular variety of corn whose cobs have the grains of a color tending to red. A tasty gluten free snack, high in fibre and not fried.

Ingredients

Cornmeal of Storo 95%, sunflower oil, salt. Gluten free.

Packaging details

80 gr net, ct x 12 units. Plastic pp Coex

Shelf life

240 days

International certifications

BRC, IFS

VITAVIGOR

HALL: 6 BOOTH: E 042

www.vitavigor.com



VITAPOP

Vitapop: the new Vitavigor's snack, crunchy, tasty and surprisingly light, with the innovative 'pop' shape. The Vitapop are made with 100% extra virgin olive oil as all the Vitavigor's recipes. Ideal for a break at the office, while cooking or during the meals. The Vitapop line is offering 4 different flavors: Vitapop with corn flour, Vitapop wholewheat, Vitapop Cacio and Pepe, Vitapop Chili.

Ingredients

Bakery product with extra virgin olive oil (7%). Salted on surface. Unbleached wheat flour, extra virgin olive oil (7%), salt, yeast, malted wheat flour.

Packaging details

120 gr bag, recyclable packaging in paper collection.

Shelf life

380 days

International certifications

IFS Food

PASTICCERIA FRACCARO

HALL: 6 BOOTH: A019

www.pasticceriafraccaro.it



WHOLE WHEAT CROISSANT WITH FLAX, SESAME AND SUNFLOWERS SEEDS

'Colazione per 3' ('Breakfast for 3') is the name of Pasticceria Fraccaro's whole wheat croissant with flax, sesame and sunflowers seeds. Kneaded three times with the company's mother yeast since 1932 and naturally leavened in 72 hours, the croissant is hand-rolled as in the best pastry tradition.

Ingredients

Mother yeast, flax seeds, sesame seeds, sunflowers seeds, whole wheat flour.

Shelf life

120 days

ICAM CHOCOLATE

HALL: 6 BOOTH: I 036

www.icamcioccolato.com · www.vanincioccolato.com



VANINI BARS BIO MONORIGINE UGANDA

6 products, all strictly organic, made with an incredible and unique Ugandan cocoa, coming from the Bundugyo cooperatives where ICAM has built a cocoa collection center. Here, together with local people, the fermentation and drying phases of cocoa beans are entirely carried out. BIO Uganda bars have been relaunched with a new colorful, attractive and compostable flowpack.

Ingredients

Precious Ugandan cocoa with all organic inclusions: whole hazelnuts, whole almonds, whole hazelnuts and caramel, whole salted pistachios.

Packaging details

85 gr. Packaged in a compostable flowpack made from paper and a patented biopolymer. 100% compostable according to industrial disposal rules.

Shelf life

Shelf life average 18 months

International certifications

BIO, 100% Made in Italy, Bean to Bar in Italy, Vegan Ok, Gluten free, Packaging ECOCERT

IL FORNAIO DEL CASALE

HALL: 6 BOOTH: J 045

www.gecchele.com



FILLED CRÊPES

Crêpes filled with chocolate-flavored cream, 6 multipacks single wrapped. The perfect sweet snack all day long.

Ingredients

Milk, sugar, wheat flour, eggs, sunflower oil, chocolate.

Packaging details

192 gr (6 single portions)

Shelf life

60 days

International certifications

IFS

PRODUCT SHOWCASE · SWEETS

LA PERLA DI TORINO HALL: 6 BOOTH: H 035

www.laperladi torino.it/en



LE GOLOSE CHOCOLATE BARS

From chocolate truffle to bar. The Golose Bars are born from the recipe of the three most loved truffles: Salted Peanut, Tiramisu, Pistachio. The case of the bars has been designed to recall the graphics of the corresponding chocolate truffle: at the top right the cases have a triangular band with different graphic motifs and the color of the entire box recalls that of the wrapping. The lower part is instead made up of the same geometric strips that are found on the bar once the case is opened.

Packaging details

One flavour bar: 18 x 7,5 x 1,2 | 12 pcs/box. Counter display (11 chocolate bars per single flavour): 22 x 23,5 x 18 | 1 pc/box

Shelf life

12-15 months

International certifications

BRC

LAGO GROUP HALL: 6 BOOTH: J 028

www.lagogroup.it



CIAMBELLA DOUGHNUT WITH APRICOT JAM 'GIRO D'ITALIA' SPECIAL EDITION

Gastone's snacks product line pays homage to 'Giro d'Italia', Italy's most prestigious road bicycle race with a limited-edition packaging for the entire line. The new special pink pack will be available in stores from March till the end of May. Soft, delicious and irresistible, Gastone's snacks derives from Lago's pastry expertise combined with innovative technological solutions. This line includes a variety of soft cakes products such as Doughnuts, Tartlets, Pan brioche and Golosa. In particular, Ciambella doughnut with apricot jam is a delicious treat thanks to its soft consistency and fruit aroma.

Packaging details

240 gr (6 x 40 gr) - 8,46 oz (6 x 1,41 oz). Flowpack package (6 x pack)

Shelf life

6 months

LAICA

HALL: 6 BOOTH: I 033

www.laica.eu



LAICA CAFFETTINI

When chocolate meets coffee, a new love story begins: Laica 'Caffettini', small but with an intense pleasure. A cup of coffee in a little cube of chocolate, to be tried in 4 tastes: classic, ginseng, macchiato and decaf.

Ingredients

Extra dark chocolate, coffee paste, liquid coffee in 4 taste: classic, ginseng, macchiato and decaf.

Packaging details

Case 15 pcs, 200 gr

Shelf life

12 months

International certifications

Brc, Ifs, Utz, Rspo, Kosher, Sedex, Fairtrade

ACETIFICIO ANDREA MILANO

HALL: 05 BOOTH: I 039

www.acetomilano.it



ORGANIC APPLE CIDER VINEGAR WITH THE MOTHER CREAM

The Organic apple cider vinegar with the mother cream in the practical 150 ml format is a unique, dense, and fruity condiment. Perfect for cold cuts, cheeses, vegetables and white meats but also on sweets and ice cream.

Ingredients

Juice concentrated, apple cider vinegar 40% , apple juice flavor, thickener: corn starch. All organic ingredients

Packaging details

PET bottle 150 ml

Shelf life

36 months

International certifications

BRC, IFS, Organic

AGROMONTE

HALL: 05 BOOTH: F010

www.agromonte.it



LA NOSTRA POLPA

La Nostra Polpa is the new Cherry tomato pulp with datterino tomato introduced by Agromonte, the Sicilian company specialized in the transformation of tomatoes. The product's name, La Nostra Polpa (Our Pulp in English) dominates the packaging label, highlighting the nature of the product. This new Agromonte product derives from the selection of high-quality raw materials that undergo a transformation process that combines traditional manufacturing with innovative technologies. The result is a captivating delicate sweet pulp, characterized by the unique datterino tomato taste.

Ingredients

Cherry tomato (69%), datterino tomato (29%), salt, sugar.

Packaging details

Glass bottle 360 gr

Shelf life

36 months

BONOMELLI

HALL: 05 BOOTH: D 021

www.gruppomontenegro.com



POLENTA VALSUGANA READY TO SERVE

All the goodness of Polenta Valsugana, made with 100% Italian yellow corn flour obtained from selected grains, is also available in a ready-to-serve version, with a multilingual package. Pre-dosed in practical stay-fresh trays, it is the ideal ally for last minute preparations. It can be cut into slices, cubes or sticks and heated up as desired in the oven, on the grill, in a pan or in the microwave. Polenta Valsugana is naturally gluten free, low in fat and without preservatives added.

Ingredients

Water, maize flour, salt, acidity regulator: tartaric acid.

Packaging details

600 gr, paper box with stay-fresh tray

Shelf life

15 months

International certifications

Kosher

MAJANI 1796 HALL: 06 BOOTH: J 033

www.majani.com



ASSORTED CHOCOLATE BARS

The Majani Bars are dressed in a totally new and original design packaging: a practical and exclusive doypack bag with a resealable and freshness-saving zip. Ideal for on-the-go consumption, to enjoy the excellence of Majani chocolate at any time of the day, for a tasty snack and for a boost of energy. The line includes: Milk chocolate, Milk chocolate 52%, Dark chocolate 75%, Dark chocolate 82%, Milk chocolate with hazelnuts grain, Dark chocolate with hazelnuts grain, Dark chocolate with orange peels.

Ingredients

Sugar, cocoa paste, whole milk powder, cocoa butter, hazelnuts, orange peels, emulsifier soya lecithin, vanilla.

Packaging details

Weight 100 gr, pack type: polypropylene bag

Shelf life

18 months

International certifications

FSSC 22000

PASTICCERIA QUADRIFOGLIO HALL: 03 BOOTH: E 007

www.pasticceriaquadrifoglio.com



CAKE IN JAR

Frozen pastry for the retail sector. Layered single portion in trendy glass jar. Carefully selected ingredients, premium recipes, outstanding presentation. Perfect to share with family and friends or the enjoy by yourself.

Ingredients

Cream, milk, cookies, sponge cake.

Packaging details

Single portion of 65-80 gr. Glass jar + aluminum lid and paper label. Case of 6 desserts.

Shelf life

Frozen 18 months, chilled 5 days

International certifications

BRC, IFS

ORE LIETE HALL: 06 BOOTH: I 046

www.orelieteperugia.it



ORE LIETE ASTUCCIO 450 GR

A selection of pastries suitable for any occasion. Rich shortbread, delights enriched with chocolate, to satisfy every taste.

Ingredients

Wheat flour, chocolate, butter

Packaging details

450 gr box

Shelf life

10 months

International certifications

BRC, IFS

CAMPO D'ORO HALL: 5 BOOTH: D 022

www.campodoro.com



TRAPANESE PESTO SAUCE WITH ALMOND FROM AVOLA

The Trapanese Pesto Sauce is a typical Pesto of the Sicilian culinary tradition, with a bright red color and a strong aroma of freshly picked tomatoes and fresh basil, with the addition of Avola-almonds, which make it a unique product, very appreciated by gourmet lovers. To be used for a good pasta dish, to give an extra touch to risotto, for imaginative bruschetta, on toasted bread, to flavour meat and fish dishes.

Ingredients

Tomato pulp 52%, sunflower oil, basil 8%, rehydrated sundried tomato 6%, tomato paste, almonds 3%, wine vinegar 1,4%, salt, garlic, hot pepper, acidity regulator: lactic acid, ascorbic acid

Packaging details

180 gr

Shelf life

36 months

International certifications

BRC, IFS, FSSC 22000, CCpb Bio Organic, Kosher Siks, Halal

ALIS - CASA RINALDI HALL: 05 BOOTH: I 001

www.casarinaldi.it



WHITE TRUFFLE FLAVOURED CONDIMENT WITH NATURAL AROMA

A new, fragrant oil with the most elegant and noble flavor: white truffle. European olive oil is combined with the natural aroma of truffle, along with flakes of the precious white truffle, for a condiment with an unmistakable flavor and unique scent. This oil is an evolution and innovation in the sector, thanks to the exclusive use of a natural aroma. An essential ally to enrich culinary creations.

Ingredients

Olive oil (98,4%), natural truffle flavour, dried white truffle 0,1% (Tuber magnatum Pico).

Packaging details

Glass bottle 100 ml + case

Shelf life

18 months

International certifications

IFS Broker and Logistics

D'AMICO HALL: 5 BOOTH: E 004

www.damico.it



CASTELVETRANO PITTED GREEN SWEET OLIVES 'VASI D'AUTORE 2022'

The Collection of Vasi D'Autore 2022 in Limited Edition includes four products: Eggplants, Sundried Tomatoes, Rustic Artichokes and Castelvetro pitted green sweet olives. The 2022 Collection is signed by the international contemporary art artist Vickie Vainionpää, whose works draw attention to the constantly evolving relationship between man and technology. Castelvetro pitted green sweet olives are a Sicilian variety, among the most valuable, harvested in Castelvetro, in the province of Trapani.

Ingredients

Water, olives, salt, acidity regulators citric acid and lactic acid, antioxidants ascorbic acid. The product may contain olive stones or fragments of them. Gluten free.

Packaging details

Glass, 700 gr

Shelf life

36 months

International certifications

BRC food, IFS food

PRODUCT SHOWCASE · PASTA & GROCERY

PASTIFICIO FELICETTI HALL: 6 BOOTH: D 002

www.felicetti.it



SQUARE SPAGHETTI QUADRATI ORIGINALE FELICETTI

Re-edition of the handmade 'spaghetti alla chitarra'. The new format stands out for its generous body offered by the wider surface, which thanks to the square section of 2.05 mm per side, gives the palate a perceptibly higher volume than a classic spaghetti of equal size. No better way to add authentic taste to every recipe.

Ingredients

Durum wheat semolina, water

Packaging details

500 g / 1.1 lb. The pack is made of 100% natural paper from PEFC-certified pure cellulose and comes from sustainably managed forests.

International certifications

Organic (Reg. 834/2007/CE), JAS, NOP, COR and Demeter, BRC, IFS.

PASTIFICIO ATTILIO MASTROMAURO GRANORO

HALL: 5 BOOTH: A 004

www.granoro.it



PACCHERI N.136 'GRANORO DEDICATO - LE SPECIALITÀ DI ATTILIO'

Durum wheat semolina 100% from Apulia

Packaging details

500 gr paper bag

Shelf life

36 months from date of packaging

International certifications

Recycled paper - Aticelca 501 certified FSC, FSSC 22000:2011, IFS, BRC, Organic, Kosher, Halal, ISO 22005:08, ISO 14001:2004, EMAS, OHSAS 18001-2007, SA 8000:2008, Pesticide free e glyphosate free.

MASTER

HALL: 3 BOOTH: E 008

www.mammaemma.it



GLUTEN FREE GNOCCHI WITH CHICKPEA FLOUR

Manufactured in a plant that uses 100% green energy, these gnocchi are made according to the authentic homemade gnocchi recipe: fresh potatoes, flour (in this case a mix of gluten free flours) and a pinch of salt. The use of gluten free flours allows these gnocchi to appeal to celiac, furthermore, the omission of egg from the recipe makes the product appealing to vegans. Lastly, the chickpea flour increases their protein content making them desirable even for athletes. Ideal to be cooked directly in a pan in 2 minutes, they are really easy and quick to cook.

Ingredients

Potatoes 68%, chickpea flour 12.5%, water, gluten free flour blend, vegetable protein, salt, sunflower oil

Packaging details

350 gr recyclable plastic bag inside recyclable paper box.

Shelf life

45 days

International certifications

IFS, BRCGS, FSSC22000, Icea, Sedex 4 Pillars

SABATINO ITALIA

HALL: 5 BOOTH: G 061

www.sabatinotartufi.com



TRUFFLE DRIZZLE

A highly innovative product which allows the truffle use in new culinary fields. For the very first time, the truffle spreads to the confectionery world, finding applications beyond chocolate. Unique among syrups in terms of food sustainability, as it is made without the use of additives and preservatives. A ready for use product to season a wide range of foods and beverages, from cappuccino to ice cream, from desserts to cocktails, from fruit to cheeses.

Ingredients

Sugar, water, citric acid, flavor.

Packaging details

1000 ml plastic bottle with dispenser; 250 ml plastic bottle

Shelf life

3 years

International certifications

BRC

GRUPPO SALOV

HALL: 5 BOOTH: C 034

www.salov.com



FILIPPO BERIO EXTRA VIRGIN OLIVE OIL RISERVA ORO 100% ITALIAN, ORGANIC

Filippo Berio extra virgin olive oil Riserva Oro 100% Italian, Organic enriches the range of Filippo Berio products dedicated to retail and which responds to the growing demand of consumers for high quality products, organic and 100% Italian with a controlled supply chain. It is produced following the Berio Method (certified by SGS) with exclusively Italian olives, whose entire supply chain is completely traceable and sustainable. It has an intense and rich taste, with typical herbaceous notes.

Packaging details

750 ml, glass bottle

Shelf life

14 months

International certifications

ICEA

SGAMBARO

HALL: 6 BOOTH: A 10

www.sgambaro.it



SPELT, LENTILS, QUINOA SPAGHETTI, SGAMBARO ORGANIC LABEL LINE

The Spelt, Lentils and Quinoa spaghetti pasta is a protein specialty produced with a mix of flours spelt, an ancient cereal, lentils, a legume, and quinoa, an herbaceous plant. This pasta has excellent nutritional values with an adequate intake of proteins and a low glycaemic index. Sgambaro spaghetti pasta brings the beloved taste of pasta to the table together with energy and well-being. All the shapes of spelt, lentils quinoa-based pasta belong to the Sgambaro Organic Label line, made only with ancient grains and special organic cereals.

Ingredients

Spelt flour (wheat) 70%, lentil flour 20%, quinoa flour 5%, pea protein isolate 5%

Packaging details

500 gr

Shelf life

3 years from the production date

International certifications

ICEA, BRC Level A, IFS Food, Star-K Kosher, Halal

PASTA CUNIOLA HALL: 6 BOOTH: E 035

www.mylinstantpasta.it



MY INSTANT RISOTTO SAFFRON

Instant risotto with saffron, ready in 5 min with the addition of boiling water or in 3.5 min in microwave at 800 watt. New pack for this instant rice, with a typical sauce of the Italian tradition. Also new is the possibility of consuming rice directly in the cup with the addition of only water, with the use of a kettle or a microwave. The friendly consumption method is also targeted on young people and consumers of salty snacks.

Packaging details

70 gr cup (50 gr instant rice, 20 gr powder sauce)

Shelf life

14 months

International certifications

BRC, IFS, Organic

RIZZOLI EMANUELLI

HALL: 5 BOOTH: D 028

www.rizzoliemanuelli.com/it



COLATURA (ANCHOVY ESSENCE DRESSING)

The Colatura di Alici is an amber colored liquid sauce obtained from the slow filtering of the liquid exuded from the anchovies during their maturation process inside barrels. The Colatura thus express the best nutritional and sensorial characteristics of anchovies, with a distinctive rich and savory flavor perfect to use as a substitute of salt.

Ingredients

Anchovies (Engraulis encrasicolus), salt.

Packaging details

Glass bottle 100 gr

Shelf life

24 months

International certifications

BRC, IFS

RUMMO

HALL: 5 BOOTH: G 046

www.pastarummo.it



GLUTEN FREE POTATO GNOCCHI

Made with fresh potatoes corn flour, both 100% Italian, the Rummo Gnocchi have pronounced ridges to capture sauce and enhance every flavor. A product that combines the quality of 'fresh' and the advantages of the 'ambient' range, to increase coverage of consumer needs and develop sales within the gluten free category.

Ingredients

Italian fresh potato puree 65% (water 38% + fresh potato 27%), potato starch 12.6%, Italian corn flour 11% corn starch 8%, sprinkling of rice flour 1.64%, salt 1.4%, acidity regulator: lactic acid (E270) 0.25%, preservative: sorbic acid (E200) 0.08%, turmeric 0.03%.

Packaging details

500 gr paper package, in a practical 6-piece display tray to facilitate the loading on the shelf.

Shelf life

12 months

SPINOSI

HALL: 7-8 BOOTH: F 006 012

www.spinosi.com/en/



ZERO + WITH RED LENTIL FLOUR

This organic food specialty has a high protein and fibre content and is ideal for anyone who likes to watch their weight, loves exercise and needs a greater intake of proteins. The red lentils and 100% Italian fresh eggs guarantee a genuine product which still maintains the flavour of traditional pasta. Naturally gluten free, red lentil pasta is also suitable for anyone suffering from coeliac disease.

Ingredients

Red lentils flour and whole fresh eggs

Packaging details

250 gr weight, pack in FSC certified paper (recyclability certification according to Aticelca method 501).

Shelf life

2 years

International certifications

Organic product

TARTUFLANGHE

HALL: 06 BOOTH: I 021

www.tartuflanghe.com



HOT & SPICY WHITE TRUFFLE HONEY

Hot & spicy food preparation with honey and white truffle. Very balanced recipe, with selected chili extracts, ideal with hard and blue cheese, or to prepare dressing for marinate pork, duck and chicken meat.

Ingredients

Acacia honey, chili extracts, freeze-dried Italian white truffle.

Packaging details

Carton box

Shelf life

12 months

International certifications

BRC, IFS

COPPOLA ENTERPRICE - VALGRI

HALL: 6 BOOTH: A 045

www.valgri.it



ORGANIC TOMATO SAUCES IN DOYPACK

Organic tomato sauce in doypack 200 gr, prepared with only selected raw materials and 100% natural ingredients. Three flavours available: Basil tomato sauce, Arrabbiata tomato sauce and Olives and capers tomato sauce. Organic tomato Basil sauce, for example, contains only tomato sauce, extra virgin olive oil, fresh basil, salt and garlic, like the best Italian homemade recipes. And it comes in an innovative and impactful format, a 200 gr doypack that completely eliminates the weight of the packaging. Moreover, it is certified organic.

Packaging details

200 gr doypack

Shelf life

24 months from production date

International certifications

BRC, IFS, JAS, Reg 834/2007 (Organic), Halal, Kosher

PRODUCT SHOWCASE · DELI MEATS

BOME'

HALL: 2 BOOTH: N 061

www.bome.it



CARNE SALADA

Salted Beef Rump

Ingredients

Beef, Salt, Dextrose, Aromatic spices, Natural flavourings, Preservative (E250, E251), Antioxidants (E301)

Packaging details

2,5 kg, vacuum packed in food grade plastic

Shelf life

90 days

International certifications

BRC, IFS

CAPANNA ALBERTO

HALL: 02 BOOTH: K 048

www.capannaprosciutti.com



CAPANNA PROSCIUTTO 20 MONTHS MATURED

This ham is left to dry up to 20 months, dedicated to high-end gastronomy.

Ingredients

Pork meat, salt

Shelf life

365 days

Packaging details

Weight: 11 kg. Available bonein, boneless, pre-sliced.

International certifications

BRC, IFS

SALUMI COATI

HALL: 02 BOOTH: L 056

www.salumificiocoati.it



COOKED HAM - SLOW COOKING

The Cooked Ham Coati slow cooking follows the philosophy of the 'right time' in all the processing stages. Thighs and natural aromas are carefully selected and processed with an excellent technique that involves cooking for at least 25 hours at low temperature steam ovens. So that the noble proteins of meat are not altered.

Ingredients

Whole leg of pork, PreSal iodized salt protected (salt, iodized potassium 0.007%), sucrose, natural flavors. Antioxidants: E301. Preservatives: E250.

Packaging details

Vacuum packed 120 gr

Shelf life

30 days

International certifications

BRC, IFS, ISO 9001:2015, ISO 22000:18, ISO 22005:2008

PROSCIUTTIFICIO MONTEVECCHIO

HALL: 03 BOOTH: A 038

www.prosciuttificiomontavecchio.it



FIOR DI FESA

It comes from the pig's leg which is boned before the curing process. This process allows the product to reach the maturing stage much earlier than a bone-in ham and, at the same time, has great advantages in terms of cutting and slicing as well as cleaning, having a reduced waste and the possibility of being worked at a positive temperature. The nature of the regular shape allows to have a homogeneous slice and a very small waste without the aid of mechanical processing.

Ingredients

Meat of Italian and European pork, salt, natural flavors.

Packaging details

6.5 kg, available whole and sliced

Shelf life

365 days, 180 days vacuum

International certifications

Canada, Japan, Brazil, Korea and Hong Kong

PRAMSTRAHLER

HALL: 03 BOOTH: F 067

www.pramstrahler.eu



SPECK 100% NAZIONALE

The 100% Italian speck is produced from heavy legs of Italian pork (born, bred and cut in Italy). The raw material is salted and spiced by hand. This is followed by cold smoking with fine beech wood. As the last stage of the production process, the speck undergoes a long curing process of 8-10 months, which allows the speck to mature slowly and achieve its unmistakable taste.

Ingredients

Pork leg meat (IT), salt, spices, dextrose. Antioxidant: sodium iso-ascorbate. Preserving agent: sodium nitrite. Raw seasoned product. Natural smoking with beech wood.

Packaging details

70 gr tray packed in protective atmosphere

Shelf life

50 days from delivery date

International certifications

IFS, BIO

SALUMI VIDA

HALL: 2 BOOTH: K 061

www.salumivida.it



'BRACE' ROASTED HIGH-QUALITY COOKED HAM

Obtained from selected fresh pork legs from which the shank is completely removed, having the right equilibrium between lean and fat, duly trimmed to obtain a high yield when cut. The legs are softened and infused thanks to a natural brine of spices and aromatic plants, whose recipe dates back to 1976. The ham is then moulded out by hand and subjected to two cooking phases: the first is the slow steaming one made to keep the fragrance and organoleptic qualities of the fresh product; the second is to roast the ham on the embers to confer its special flavour and the typical external browning.

Ingredients

Pork leg, sea salt, sugar(sucrose), spices and herbs, sodium ascorbate, sodium nitrite.

Shelf life

150 days

Packaging details

Kg 8,5/9,2, vacuum-sealed

International certifications

FSSC 22000

DEVODIER PROSCIUTTI

HALL: 02 BOOTH: L 006

www.devodier.com/en



PARMA HAM PDO DEVODIER MIN. 30 MONTHS – ANIMAL WELFARE

The product is born from a bigger supply chain project developed in collaboration with the best Italian farmers who follow strict biosafety and environmental enrichment standards and who ensure rigorous animal welfare requirements even more protective than the current regulations. The entire supply chain is controlled by an external certification body with complete traceability. On top, the final product has all the guarantees of the Parma Ham PDO because it is made with Italian meat and salt only and without preservatives.

Ingredients

Italian pork, salt

Packaging details

MAP tray 80 gr

Shelf life

90 days

International certifications

BRC, IFS, animal welfare

VERONI

HALL: 02 BOOTH: K 002

www.veroni.it



BRIOBRAIN KIT WITH MORTADELLA

Developed in collaboration with nutritionist Gigliola Braga, Briobrain is the complete and balanced savoury breakfast that provides the energy and nutrients needed to start the day right. The Briobrain Kit with Mortadella contains a gnocchino filled with the new Veroni's mortadella with 40% less fat, 30% less salt and 30% fewer calories than the traditional recipe, almonds rich in vitamin E, and two herbal teas that are excellent to enjoy hot or cold.

Packaging details

128 gr. It contains 100 gr of filled sandwich (including 50 gr of mortadella), 25 gr of shelled almonds and 2 herbal teas of 1.5 gr. The packaging is practical and 100% eco-friendly.

Shelf life

35 days

GUALERZI

HALL: 2 BOOTH: K 018

www.arcagualerzi.it



PARMA HAM PDO - ECOPACK LINE

Gualerzi PDO Parma Ham is obtained from the processing of the whole pork leg. It does not contain additives or preservatives. The high quality of the product and the delicacy of its taste depend both on the choice of the best raw materials from pigs born, bred and slaughtered in Italy, and on processing that respects the tradition and production regulations of the Parma Ham Consortium.

Ingredients

Parma Ham PDO: Pork meat, salt.

Packaging details

100 gr. The product is sliced into a wave slice for greater respect for the traditional cut, and placed in an 80% FSC certified paper tray and recyclable in paper trash.

Shelf life

60 days

International certifications

IFS, BRC

SALUMIFICIO SORRENTINO

HALL: 3 BOOTH: C 029

www.salumisorrentino.com



SALAME AQUILA

Typical artisanal 'Abruzzese' salami, with very fine grinding in natural casing. Awarded as best salami of the Abruzzo region. Gluten free, Origin of meats: EU.

Packaging details

0,450 kg, available in vacuum and flow pack packaging.

Shelf life

120 days

International certifications

BRC, IFS

FUMAGALLI INDUSTRIA ALIMENTARI

HALL: 2 BOOTH: L 044

www.fumagallisalumi.it



PARMA SLICED ORGANIC

Authentic Italian cured ham made by organic pork legs, coming from Italian heavy pigs. Firstly the legs are salted and then they rest and slowly mature for a minimum of 12 months, in temperature controlled rooms located in our Parma factory. At the end of curing, an inspector from the Parma Ham Consortium assesses the quality of each leg and brands it with the Parma Ducal Crown. Finally the hams are boned, sliced and packed under protective atmosphere. All the supply chain, from farms to final branding, complies with the Protected Designation of Origin specification.

Ingredients

Pork*, salt (*organic).

Packaging details

70 gr, ecofriendly pack with more than 75% sustainable paper and with tray completely recyclable

Shelf life

60 days

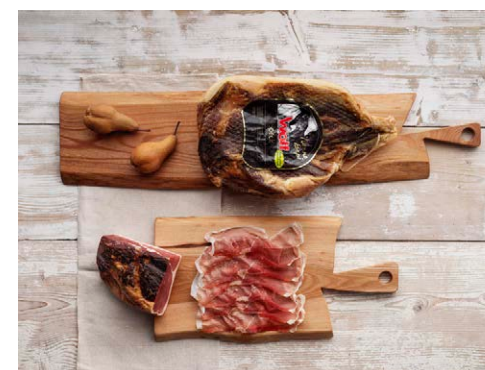
International certifications

IT BIO 007

PROSCIUTTIFICIO WOLF SAURIS

HALL: 2 BOOTH: I 056

www.wolfsauris.it



SPECK RISERVA NONNO BEPI VACUUM-PACKED

Selected legs for longer ripening process, traditional recipe still used today and Sauris microclimate make of Speck di Sauris Nonno Bepi an unmistakable speciality.

Ingredients

Pork leg, salt, pepper, aromatic herbs. Preservative: potassium nitrate.

Packaging details

6 - 6,8 kg, vacuum-packed

Shelf life

90 days

International certifications

IFS Food

PRODUCT SHOWCASE • DAIRY

SORI' ITALIA

HALL: 2 BOOTH: J 074

www.soritalia.com



BUFFALO BURRATA

Acidulous and aromatic taste, pearly white color and lactic flavor.

Ingredients

Buffalo pasteurized milk, buffalo milk cream, natural whey, salt, rennet.

Packaging details

125 gr in thermoformed cup

Shelf life

19 days

International certifications

BRCGS, ISO, IFS, Sedex, Halal, Gli Allevamenti Del Benessere

ARRIGONI BATTISTA

HALL: 2 BOOTH: A 056

www.arrigoniformaggi.it/en



SPOONABLE GORGONZOLA ONLY PULP

The new format of spoonable Gorgonzola is a package with a half wheel of about 4.5 kg of only pulp. The rind is removed before packaging, so that all the cheese contained in the tray can be used. This Gorgonzola is a top line cheese, it is particularly creamy and has a typical sweet flavor. Made with cow's milk exclusively, spoonable Gorgonzola is a historical product of the Lombard tradition that has always made creaminess its strong point.

Ingredients

Milk, salt, rennet

Packaging details

Aluminium + plastic tray + cover

Shelf life

30 days from packaging

International certifications

IBS, IFS, BIO

BOTALLA

HALL: 02 BOOTH: K 048

www.botallaformaggi.com



FORMAGGIO ITALO

Italo cheese represents one of the high-quality cheeses of Botalla. Italo represents the Italian dairy tradition. A secret recipe based on equilibrium: Italo is made with 100% pure Piedmont milk, aged on pinewood plank in a special cellar. Unique scent and wonderful taste.

Ingredients

Cow milk, salt, rennet

Packaging details

Weight 1,8 kg, 1 piece per box

Shelf life

90 days

International certifications

IFS

CASEIFICIO VAL D'AVETO

HALL: 2 BOOTH: E 056

www.caseificiovaldaveto.com



VAL D'AVETO'S STRAINED YOGURT PIEDMONT HAZELNUT PGI

The most famous taste, but never taken for granted. The delicate and precious flavor of hazelnut is combined with the acidity of yogurt. Ideal for a tasty but also healthy break, thanks to the low calorie intake of hazelnuts.

Ingredients

Pasteurized whole cow's milk, Piedmont hazelnut PGI preparation 22% (sugar, water, hazelnut paste 10%, thickener: E1442, caramelized sugar, acidity regulator: E334, flavorings, preservative: E202), starter cultures. May contain nuts and soy.

Packaging details

150 gr, plastic tray

Shelf life

30 days

BU CASTELLI FORMAGGI DOP & SPECIALITÀ - LACTALIS ITALIA

HALL: 2 BOOTH: C 044

www.castelligroup.com



CASTELLI PECORINO DI PIENZA FLAVOURED RANGE

From the knowledge of its cheese makers and the amazing landscape of the Val d'Orcia, Castelli is glad to introduce the Pecorino di Pienza Specialties range to taste the sweetness of the Pecorino di Pienza in the natural flavoured variants of Truffle, Chilli and Green Pepper. Tasty and natural, ideal in cubes for delicious aperitifs, to garnish pizzas and focaccias or as a dessert combined by honey and jams.

Ingredients

Milk, salt and rennet

Packaging details

Wedge 300 gr in a plastic thermoformed box

Shelf life

180 days

International certifications

IFS, BRC, ISO, BIO, Halal

DELIZIA

HALL: 2 BOOTH: A 016

www.deliziaspa.com



MOZZARELLA DI GIOIA DEL COLLE PDO 'BOCCONE'

Stretched-curd cheese, cow's milk. Appearance: smooth or slightly fibrous and shiny surface, milky white with possible shades of straw color; elastic consistency. Odor: lactic, sour with possible hints of butter. Taste: delicately sour milk with a pleasant aftertaste of fermented / acid whey.

Ingredients

Pasteurized cow milk, natural whey, salt, rennet.

Packaging details

Plastic film (bag) 200 gr

Shelf life

18 days

International certifications

BRC, IFS, Organic, PDO

CASEIFICIO BUSTI

HALL: 2 BOOTH: M 026

www.caseificiobusti.it/en/



GRATED AGED TUSCAN PECORINO PDO

A Pecorino cheese made with milk entirely sourced from recognised breeding farms of the Consortium for the protection of Pecorino Toscano PDO, which are located in Tuscany and Northern Lazio. The right balance of flavor, typical of Aged Tuscan Pecorino PDO, freshly grated, is kept unchanged thanks to the MAP packaging. The special freshness-saving closure of the bag preserves for a longer time the organoleptic properties of the product, such as aroma and flavor.

Ingredients

Pasteurized sheep milk, salt, animal rennet, cheese cultures.

Packaging details

90 gr fixed weight, grating and packaging in MAP

Shelf life

120 days from the packaging date

AGROZOOTECNICA MARCHESA

HALL: 02 BOOTH: C 008

www.cfelix.it



YOGURT 100% BUFFALO MILK

Yogurt 100% buffalo milk available in 5 tastes: Plain, Lemon, Berries, Apricot and Pistachio. No preservatives.

Ingredients

Pasteurized buffalo milk, grape sugar, live lactic ferments.

Packaging details

Glass with aluminum twist off cap

Shelf life

40 days

CASEIFICIO VAL D'APSA

HALL: 2 BOOTH: H 002

www.caseificiovaldapsa.it



'AFFETTIAMO' CHEESE WITHOUT LACTOSE

Affettiamo is the new line of cheeses designed by the Val d'Apsa Group to keep up with the rapid changes in the lifestyle of consumers. The line embodies one of the great values of the Group, the protection of the environment, with its eco-sustainable packaging, 100% recyclable. The Val d'Apsa Group proposes a new lactose-free cheese format, sliced into very thin slices, individually interleaved and packaged. It is a fresh and tasty cheese, specially designed for lactose intolerant people.

Ingredients

Pasteurized sheep's milk and milk, salt, rennet, selected lactic ferments.

Packaging details

Fixed weight: 80 gr. Packaging: 100% recyclable packaging (paper and plastic)

Shelf life

75 days

International certifications

IFS, BRC, FDA, List Eurasian Custom Union (EA CU)

LUIGI GUFFANTI 1876

HALL: 2 BOOTH: A 031

www.guffantiformaggi.com



CHESELLA

When the legendary Mozzarella (made with Water Buffalo milk) is literally preserved in the rich stringy pasta of Caciocavallo (from cow's milk) the meeting of two spectacular dairy traditions takes place. A marriage between buffalo's milk and cow's milk pasta, named 'Cheesella'. A novelty with more than 200 years of history behind it, (re)discovered by Guffanti.

Ingredients

Raw Buffalo milk and pasteurized cow's milk

Packaging details

Vacuum packed

Shelf life

45 days

ITALIAN FOOD & CHEESE

HALL: 2 BOOTH: G 046

www.ifcfood.com



CREAM OF PARMIGIANO REGGIANO

Authorized by the Parmigiano Reggiano consortium, this cream enhances all the unique and unmistakable flavour of the 'king' of cheeses. Creamy, easy to spread and ready to use, it is ideal for garnishing cold appetizers, finger food or tasty snacks. When heated it becomes fluid and goes perfectly with any recipe from first courses, to main courses, even with pizza. The Parmigiano Reggiano cream is without preservatives.

Packaging details

125 gr - pp bowl; 500 gr - pp bucket; stand-up bag

1000 gr - pp bucket; stand-up bag 5000 gr - pp bucket

Shelf life

8 months

International certifications

IFS certification

IGOR

HALL: 02 BOOTH: D 013

www.igorgorgonzola.com



ECOPACK IGOR GORGONZOLA 'DOLCE' AND 'PICCANTE'

Igor Gorgonzola is pleased to introduce the new 100% recyclable Ecopack for the packed portions of Igor Gorgonzola Dolce and Piccante (sweet and spicy). Gorgonzola Dolce type is characterised by its soft paste with very light and not much widespread green-blue veins. It has a delicate flavour and a ripening period of at least 50 days. The Gorgonzola Piccante type is characterized by its hard paste and intense widespread blue-green veins. The taste is strong and spicy. It has a maturation period of at least 80 days. Gorgonzola Igor is also the first cheese certified Lfree, naturally lactose-free, approved by the Aili - Italian Lactose Intolerance Association.

Ingredients

Cow's milk (98.26%), milk starters (1.5%), dried sea salt (0.21%), animal rennet (0.02%), selected moulds of penicillium type (0.01%)

Packaging details

The new 200 gr Ecopack consists of a tray, back-label and foil, all made of polypropylene, a 100% recyclable material.

Shelf life

40 days

International certifications

Halal, 0 Emission Company, BRC Food Safety, IFS Food, ISO 50.001, ISO 22000:2018



PRODUCT SHOWCASE • DAIRY

INALPI

HALL: 2 BOOTH: D 026

www.inalpi.it



SWEET MILK

Sweet Milk represent for Inalpi an innovative approach, for recipe and product, in an extremely competitive market. Spreadable milk in glass jars offered whit milk flavor or Dulche du Leche, Coconut or Strawberry want to be the different offer for the free service of the sector.

Ingredients list

Milk from short supply chains with Inalpi certifications

Shelf life

270 days

Packaging details

Glass jars with aluminum cap

Palletization

180 gr jam.

International certifications

UNI EN ISO 9001, FSSC22000, BRC standard, IFS, UNI EN ISO 14001, SA8000, Halal, Kosher, UNI EN ISO 22005, ISO 45001, Organic, AEO

LATTERIA SORESINA

HALL: 02 BOOTH: B 026

www.latteriasoresina.it/en



GRANA PADANO PDO CHEESE GRAN SORESINA THERMOFORMED RESEALABLE

Resealable thermoformed Gran Soresina Grana Padano PDO cheese is packaged with a rigid tray in a protective atmosphere which, thanks to its special resealable film, ensures convenience, freshness and product quality. It is available aged 12 months in the 300 gr fixed weight cut. It's made only with the milk from our cows. Its quality is guaranteed and certified by controls along the entire supply chain, from the land to the table, in full respect of the environment and animal welfare. It is also naturally lactose-free.

Ingredients

Milk, salt, rennet, preservative: lysozyme from egg.

Packaging details

300 gr, rigid tray, MAP

Shelf life

120 days

CASEIFICIO LONGO

HALL: 2 BOOTH: E 062

www.caseificiolongo.it/en



TOMINO DEL BOSCAIOLO

100% Piedmont milk, traditional recipe, and genuine goodness: these are the ingredients that make Tomino del Boscaiolo a unique cheese, containing all the essence of an area (the Piedmont region) where excellent food and wine are part of everyday life. Its smooth and compact paste and the maturing process give to the Tomino del Boscaiolo its sweet and very slightly spicy flavor. Thanks to a relationship with Piedmont's dairy farmers that goes back decades, Caseificio Longo can rely on the supply on the finest quality milk.

Ingredients

Milk, salt, rennet.

Packaging details

New eco-friendly pack of 180 gr., made with paper and plastic.

Shelf life

30 days

International certifications

BRC, FDA, Haccp, IFS

LATTERIA SOCIALE MANTOVA

HALL: 2 BOOTH: D 020

www.lsmgroup.it



GRANA PADANO GRATED 100 GR BAG

The Grana Padano grated range produced by LSM Group is wide and includes several formats, from smaller bags (100 gr to 500 gr), to larger (1 kg, 2 kg, 5 kg), specific for retail and catering services. One of the most successful is the fresh grated Grana Padano 100 gr, in the Doypack aluminium resealable bag. A captivating and functional packaging, recently renewed, that preserves the flavour and the quality of the product, but also easy to store and ready to use in the kitchen.

Ingredients

Milk, salt, rennet, lysozyme from egg

Packaging details

Doypack aluminium resealable bag.

Shelf life

90 days

International certifications

BRS, IFS, Haccp, Ica, Halal, Kosher.

CASEIFICIO PALAZZO

HALL: 2 BOOTH: B 068

www.caseificiopalazzo.com



FROZEN BURRATINA 120 GR

Kneaded cheese filled with stracciatella, a mix of mozzarella ribbons and cream. Quick frozen product.

Ingredients

Pasteurized cow's milk, UHT cream min. 35% (cow's milk cream, milk protein, emulsifier: mono- and diglycerides of fatty acids E471, lactic acid esters E472/b, stabilizers: Xanthan gum E415, carrageenan E407), whey starter culture, salt, microbial coagulant.

Packaging details

PP cup with a new design a label.

Shelf life

12 months

International certifications

IFS, BRC, Halal

PARMAREGGIO

HALL: 2 BOOTH: F 013 A

www.agriform.it - www.parmareggio.it



AGRIFORM GRANA PADANO PDO SNACKS

Five practical Grana Padano bars, individually packaged, for a quick break at work or for a boost of energy after a workout. They can be kept out of the fridge for up to 4 hours, for a good and natural snack wherever and wherever needed.

Ingredients

Milk, salt, rennet, lysozyme from egg.

Packaging details

A plastic bag with modified atmosphere, containing 5 single 20 gr packs of Grana Padano. Total weight: 100 gr (20 gr x 5 pcs)

Shelf life

120 days

International certifications

IFS, FSSC:22000, Haccp

We did *not* focus on the Market.

We focused on Andrea.

BacktoNature is all food's path to finding and using eco-friendly materials for the Private Label.

Take a look at the NEW preformed PAPER tray: 100% RECYCLABLE, created with an eye to the environment and the future generations' well-being in mind.



backtonature.eco



EVENTS

www.alimentaria.com

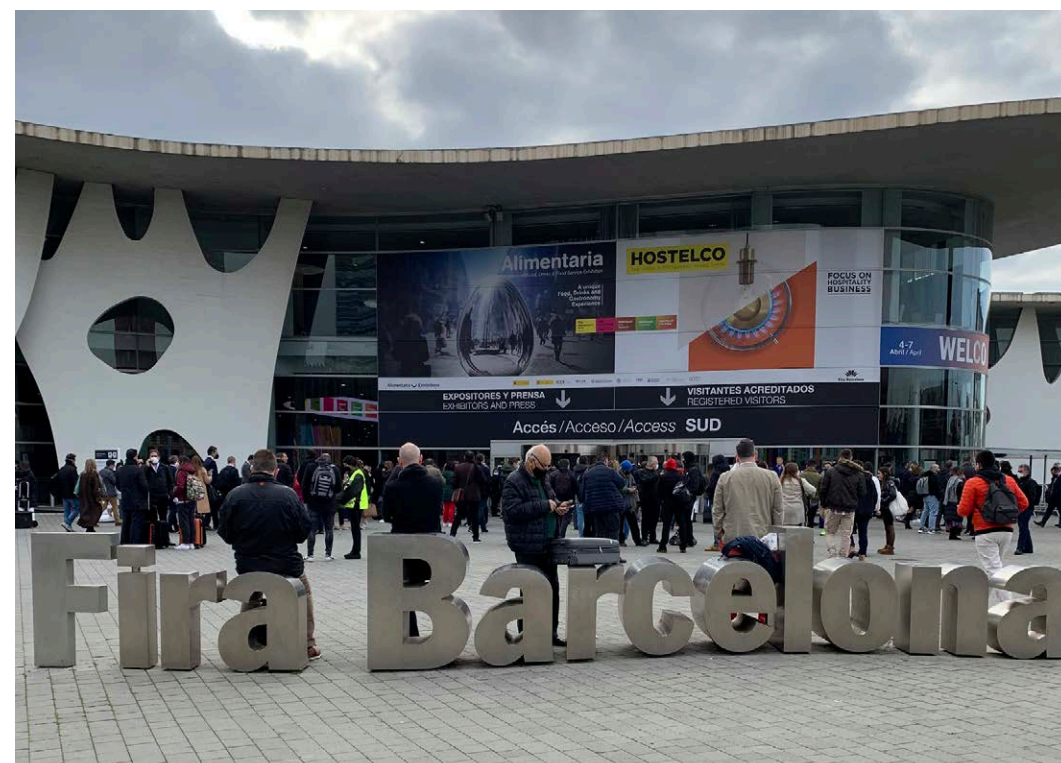
Alimentaria 2022: ¡Bienvenida Italia!

On stage in Barcelona, on the past 4-7 April, the major Spanish food & beverage trade show. A high attendance of buyers was recorded, as well as a large number of Italian exhibitors.

From our reporter Dante Zamin

A return in 'grand style' for Alimentaria, the international trade show dedicated to food & beverage held from 4 to 7 April within the Gran Via exhibition center in Barcelona. Most exhibitors said to be very were satisfied with this post-pandemic 'live' edition of the event. Attendance was indeed very high, as proved by the long queues at the entrance since the early morning. Alimentaria was held together with Hostelco, the exhibition of equipment for the Horeca channel. Overall, more than 3,000 companies participated, of which 400 from 52 different countries. Italy included.

Hence, in hall 2, the Italian Trade Agency (ITA) organized a collective of 27 Italian f&b from Southern Italy, as part of the 'Export Sud 2' program. In collaboration with the Association of Italian Chefs in Spain (Acis), ITA also organized a show cooking focused on typical dishes from eight regions of Southern Italy: Calabria, Campania, Puglia, Basilicata, Abruzzo, Molise, Sicily and Sardinia. After the success of Alimentaria, in 2023, from 26 to 29 September, Fira Barcelona will host Alimentaria Foodtech, trade show dedicated to the tech innovations in food processing.



Alimentaria 2022: ¡Bienvenida Italia!

È andato in scena a Barcellona, dal 4 al 7 aprile, il maggior evento fieristico dedicato al food & beverage della Penisola Iberica. Presente una folta rappresentanza di espositori dal Bel Paese. Grande affluenza di buyer, soprattutto dal Sud America.



Pier Luigi Sereni



Guillermo Andrés Gil Rios



Cristina Trovato and Erika Libero



Andrea Pensalfine



Davide Maddaleno



From left: Nicola Caprai, Ilaria Maculan and Laura Strati



From left: Giacomo Baseotto and Giovanni Corradini



Stefano Ferri



From left: Valeria Varlese and Camilla Mastromartino



From left: Riccardo Cordani and Mario Rasi



From left: Giovanni, Michele and Riccardo Quaranta



Paolo Licata



From left: Alessandro Cagnolati, Alice Rinaldi and Marcello Magagnoli



From left: Pietro Scalco, Maria Vittoria Finco and Eduardo Huby



Stefania Rota



Nobile Mirko Sessa



Marzia Caricato



From left: Cinzia Balducci and Elisa Tittarelli



From left: Umberto Toniolo and Moreno Grendene



From left: Francesco De Simone and Emiliano Inaudi



Claudio Verri



Gabriele Ascione



From left: Valery Ayquipa and Francesco Amodio



Andrea Politano



Mariachiara and Giovanni Mazza



From left: Annamaria Scaltro (Molini Industriali), David Berni (Molini Industriali), Giancarlo Cavani (Natali), Veronica Mastali (Ciresa) and Celsino Roncaglia



On the left: Gaia Bongiovanni



From left: Quintino and Giovanni Bruno, Michele Intieri



From left: Andrea and Filippo Chiavazza



Sabrina Dalla Giovanna



Cristina Apicella



Vania Chiozzini



Maurizio Peila



From left: Giulia Dall'Acqua, Luca Rivetti and Davide Di Domenico



From left: Silvia Dellarossa and Martina Minetti



From left: Luisa Mainardi e Rosangela Corino



Jenny Bonamico



On the right: Filippo Salce



Conte Paolo Salvadori



Elena Albani and Daniele Cominelli



Mariaraafaella Daddi



Silvia Spadator



From left: Carlos Salicrú and Andrea Celada



Franco and Marco Sordo



From left: Luca Olivi, Roger Garau, Cesare Roberto and Sandra Mori



Gaetano Sorrentino



Maria Laura Bedini, Luca Ceriani and Marcello Cirrione



Barbara Zotti



Simona Marolla



Marco Savoldi

INSIGHTS

Global powers of retailing: the ranking

The Top global players according to Deloitte based on their turnover. In the FY 2020, 158 companies closed the year with profit. The state of the art in Europe and a snapshot of the Italian firms included in the chart.



THE EU AREA IN THE FISCAL YEAR 2020

	Number of companies	Average retail revenue (US\$M)	% retail revenue from foreign operations
Germany	18	30,121	52.3%
France	11	25,435	39.6%
United Kingdom	15	15,892	15.2%
Netherlands	4	34,888	78.2%
Russia	7	11,150	0.0%
Spain	5	15,178	30.6%
Other Europe	30	10,546	30.8%
Total Europe	90	18,558	39.6%



Source: 'Global Powers of Retailing 2022' by Deloitte

I big del retail: la classifica

È pari a 5.110 miliardi di dollari il fatturato generato complessivamente dai 250 Top retailer globali nel corso dell'anno fiscale 2020. Sono questi i numeri che emergono dalla 25esima edizione dello studio 'Global Powers of Retailing' di Deloitte, stilato sulla base del giro d'affari. Per l'anno fiscale 2020 (FY2020) la crescita messa a segno dai 250 Top retailer al mondo è del +5,2%, in aumento di 0,8 punti percentuali sull'anno precedente. E sono 158 le aziende ad aver chiuso l'anno con profitto. Lo stato dell'arte in Europa. E una breve panoramica italiana.

The total turnover generated by the Top 250 global players during the fiscal year 2020 (July 2020 to June 2021) amounts to 5,110 billion dollars (almost 4,648 billion euro). These are the figures that emerge from the 25th edition of the study 'Global Powers of Retailing' issued by Deloitte. Which every year analyzes and draws the ranking of the 250 most relevant retailers on a global scale based on their turnover. In the fiscal year 2020 (FY2020) the Top 250 retailers scored a +5.2% growth, thus registering an increase by 0.8 percentage points over the previous year.

"In FY2020, the year of the pandemic, we saw the rapid increase of many retailers. The e-commerce exploded thanks to the double-digit growth of the online purchases", explains Enrico Cosio, Deloitte's partner and retail, wholesale and distribution manager. "The luxury and travelling industry were the segments that suffered the most. On the one side, 69 companies out of 250 registered lower revenues compared to FY2019, on the other 158 closed the year with profit. Considering the FY2015-FY2020, the overall performance of the Top 250 retailers resulted fairly stable in terms of sales growth and margins".

The Top 10 retailers in the ranking

The retailers which positioned in the first 10 places in the general ranking issued by Deloitte account for 34.6% of the total turnover generated by the Top 250 global retailers. Scoring a 1.9 percentage points growth over the previous fiscal year. The podium did not change compared to 2019, once again being all American. Gold medal for Walmart, a global leader for over 20 years. Which scored a year on year retail revenue growth of 6.7%, driven by sales in physical and online stores. Amazon follows in the second position. Among the Top 10 retailers, it almost doubled the retail revenues over the previous fiscal year, with an annual growth of 34.8% (+17.1 percentage points). And, lastly, Costco ranks third once again, with a retail revenue's growth by 9.2%. And the e-commerce channel accounts for almost 6% of the net retail revenues generated in FY2020. The German Schwarz Group ranks fourth as the previous year, with retail

revenues that amount to 144,254 million dollars, increasing by 10% compared to the fiscal year 2019. In the Top 10 ranking immediately follow respectively the American The Home Depot, The Kroger Co. and Walgreens Boots Alliance. The German Aldi scores eight. And, for the first time ever, the Top 10 acquires an Asiatic e-retailer: JD.com. The Chinese giant, the main rival of Alibaba.com in the online segment, in FY2020 scores an increase by 27.6% in net retail revenues over the previous year. Gaining four positions compared to FY2019, thus ranking ninth. The Top 10 ends with the American Target, which registers an increase by 19.8% over FY2019. Overall, the Top 10 retailers in FY2020 registered a year on year growth rate of 12.4% (+8 percentage points over the previous year), and more than double of the entire ranking (5.2%).

Europe is first for number of retailers in the Top 250

Europe once again proves to be the most represented geographical area in Deloitte's ranking. As a matter of fact, the number of European retailers in the Top 250 increased from 87 to 90 in FY2020. Despite having the largest number of companies, Europe contributed 32.7% to the total Top 250 retail revenue, ranking second behind North America (48.4%). Moreover, only Schwarz Group and Aldi entered the Top 10, as already mentioned.

"Though they preserve a net profit margin on average with the general ranking, the European players show the effects of the lockdowns due to the Covid-19 pandemic through a slight decrease in the growth margins, as corroborated by the lowest year on year growth rate among the geographical areas considered", says Cosio. Indeed, it amounts to 1.1%, 3.3 percentage points less than the FY2019. "Notwithstanding the difficulties, many EU companies still registered a double-digit growth", adds Cosio. According to the report, 21 companies experienced such an increase. And in the majority of cases, these realities are large scale distribution and online retailers.

Ultimately, the most represented EU countries are Germany (18 companies), which contribute 20% of the European companies and nearly one-third of the regional retail revenue. Moreover, UK

(15 companies) and France (11) stand out.

And what about Italian retailers?

Even the Italian large scale distribution registered an overall positive performance in FY2020. 3 out of 4 Italian players listed in the Top 250 - Conad, Esselunga and Eurospin - closed with year on year retail revenues going up compared to FY2019, only Coop slightly decreases (-0.7%). In the large scale distribution segment, Conad is the first Italian company in the ranking, coming in 61st position. Coop and Esselunga follow, respectively in 77th and 116th position. "The Eurospin Group comes last, still gaining 10 positions thanks to its good performances, thus positioning 153rd in the Top 250", ends Cosio. Furthermore, as far as luxury is concerned, the negative effects of the lockdowns are very visible. Indeed, Essilorluxottica loses 20 positions over FY2019 (-15.9%).

TOP 10 RETAILERS IN THE FISCAL YEAR 2020

Top 250 rank	Change in rank	Name of company	Country of origin	FY2020 retail revenue (US\$M)	FY2020 retail revenue growth	FY2020 net profit margin ¹	FY2020 return on assets	FY2015-2020 retail revenue CAGR ²	# countries of operation	% retail revenue from foreign operations
1	0	Walmart Inc.	United States	559,151	6.7%	2.5%	5.4%	3.0%	26	21.9%
2	0	Amazon.com, Inc.	United States	213,573	34.8%	5.5%	6.6%	21.9%	21	31.7%
3	0	Costco Wholesale Corporation	United States	166,761	9.2%	2.4%	7.3%	7.5%	12	26.8%
4	0	Schwarz Group	Germany	144,254	10.0%	n/a	n/a	7.8%	33	72.0%
5	2	The Home Depot, Inc.	United States	132,110	19.9%	9.7%	18.2%	8.3%	3	7.5%
6	-1	The Kroger Co.	United States	131,620	8.3%	2.0%	5.3%	3.7%	1	0.0%
7	-1	Walgreens Boots Alliance, Inc.	United States	117,705	1.5%	0.3%	0.5%	5.6%	9	8.5%
8	0	Aldi Einkauf GmbH & Co. oHG and Aldi International Services GmbH & Co. oHG	Germany	117,047*	8.1%	n/a	n/a	5.8%	19	73.3%
9	4	JD.com, Inc.	China	94,423	27.6%	6.6%	11.7%	31.2%	1	0.0%
10	1	Target Corporation	United States	92,400	19.8%	4.7%	8.5%	4.6%	1	0.0%

¹ Net profit margin based on total consolidated revenue and net income. May include results from non-retail operations if these are <50% of group revenue.

² Compound annual growth rate

e = estimate
n/a = not available

Source: 'Global Powers of Retailing 2022' by Deloitte

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MARKETS & DATA

CANADA

In Canada, between January and August 2021, the Italian agri-food export (including conventional and organic) accounted for 651 million euro, up by 8% over the same period in 2020. The Land of the maple leaf places tenth among the destination countries of the Peninsula's export. It accounts for 2% of the total made in Italy export. And according to the organic exporting companies, it is one of the countries with the largest growth prospect for organic products of Italian origin (behind Germany, Scandinavia, France, Japan and the USA). For 20% of the countries interviewed by Nomisma, Canada is a promising country as far as organic is concerned. Also thanks to an average high per capita spending, which equals to 93 euro, by far larger than the Italian one, which instead amounts to 60 euro per capita. The consumer base of organic goods is high as well: 76% of the Canadians between 18 and 65 years old has at least one occasion to consume organic products at home. Overall, the segment accounts for 3.2% on the grocery expenses. Canada, moreover, proves to be a country with a high frequency of organic products. In fact, 66% of the interviewees is a frequent user and consumes them at least once a week. It is usually couples with kids under 12 years old, young and autonomous workers between 18 and 29 years old, living mainly in Quebec and in the British Columbia and that possess a mid to high job or study title. Frequently, they have travelled to Italy or have Italian origins as well. Mainly purchased in supermarkets (40%) or in specialized channels (12%), organic products find their place on dedicated sites as well (8%) or on marketplaces such as Amazon Fresh (7%). But which are the main motivations that push Canadians to purchase these products? 1 consumer out of 2 chooses organic goods for health reasons. Taking into account the products' quality and the presence of certifications which provide guarantees as well.

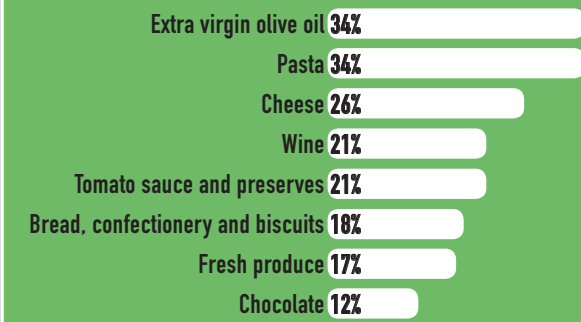
Made in Italy: an added value

Canada once again proves to be an open market towards new tastes, cultures and traditions. Indeed, during the last year, 9 consumers out of 10 tasted foreign products. They are mainly American goods, but even Italian ones defend themselves well with 36% of the interviewees claiming that they have eaten Italian food at least once in 2021. In order to recognize an Italian product on the shelves, 65% of the Canadians looks for the 'Made in Italy' caption on the label. Actually, 35% runs the risk of purchasing products that are not of actual Italian origin because they merely look for the Italian flag, or they do not even pay attention to the packaging. But, all in all, the citizens of the North American state recognize an added value to the organic products of our country. So much that 50% of them thinks that the quality is better compared to the non-conventional products coming from other markets. The price, instead, is considered to be higher than the average. Nevertheless, 7 Canadians in 10 would be willing to pay more to purchase an Italian organic product. It is a very encouraging sign, however the extra cost they would be willing to spend is lower than the one they pay for American and Chinese organic products. Bright predictions for the future as well. Canadians, in fact, claim that the attention towards the organic segment is expected to grow until 2025. 1 in 3, ultimately, will buy more organic products.

THE VALUE OF MADE IN ITALY

Are there organic products for which you are/would be more interested if made in Italy?

Multiple choice TOP interest Made in Italy products

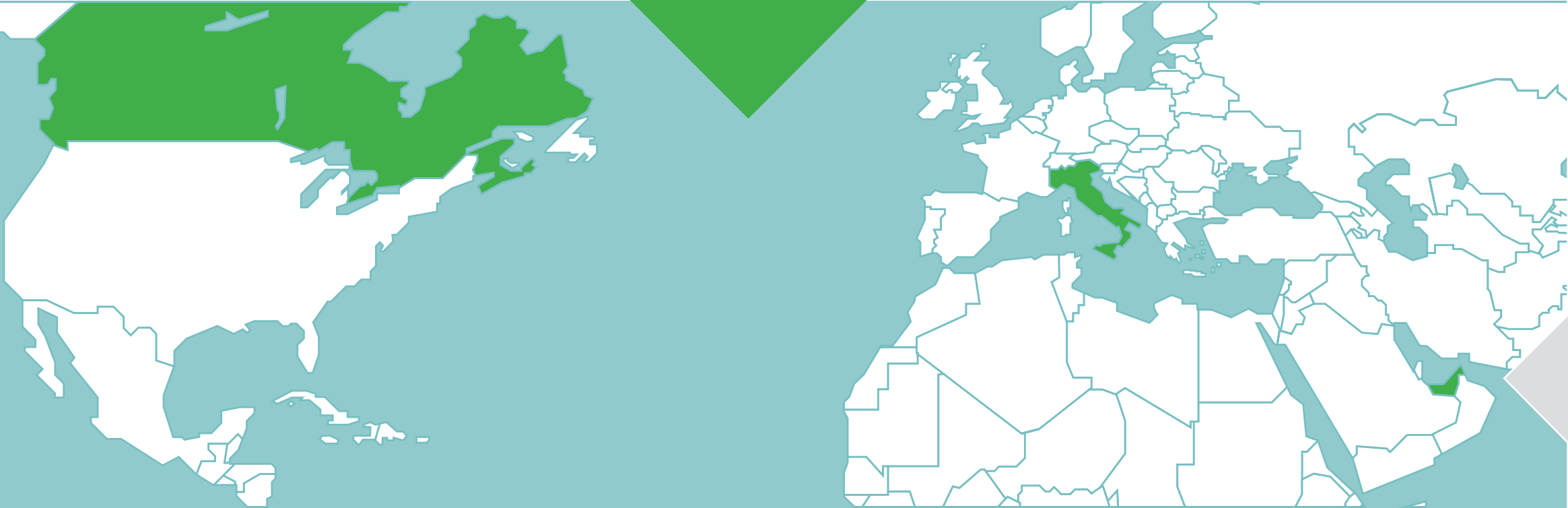


Source: project ITA.BIO Nomisma for ITA Agency - CANADA Consumer survey

Conquering international markets

Made in Italy organic products grow stronger abroad. Focus on Canada and United Arab Emirates, at the core of the latest analyses carried out by Nomisma. The new challenges and growth opportunities.

by Eleonora Abate and Aurora Erba



Canada and the United Arab Emirates (UAE) are at the focus of the last two webinars organized by ITA.BIO, the platform promoted by ITA Agency, in collaboration with Federbio (Italian Organic Association) and supervised by Nomisma, an Italian market research company. The conventions took place on live streaming on 1 December 2021 and 9 February 2022, respectively. Following the webinars organized by ITA.BIO in December 2020 and January 2021, which based on the made in Italy organic market in the USA and China. What are the most distinctive trends in the organic segment in Canada and the UAE? Which opportunities are there for the Italian companies that wish to export to those two strategic nations as far

as growth and appreciation potential towards our products? The answer lies in the analyses carried out by Nomisma.

Italian organic in the world

According to Nomisma's data, which were presented during the webinars, today in Italy organic-product sales account for 4.5 million euro. Of which, over 40% derives from exports. Italy, indeed, is the second organic-exporting country. In the last 10 years, the Italian non-conventional segment experienced an actual boom and grew +156%. In 2021, instead, the sector increased by +11% over the previous year. In its entirety, the segment accounts for 5.9% of the total Italian agri-food export rate. But which are the key factors

that determine the success of the made in Italy organic products on foreign markets? According to Nomisma's inquiry, the main element ought to be the goods' high quality (69%), followed by a general interest of foreign consumers towards Italy (44%) and by an average high per capita spending on organic products (31%). However, accessing a foreign market is not that simple. The Italian companies involved in the survey indeed claim that they had to face some difficulties before being able to penetrate new markets. What affects the most the export overseas are mainly the costs to promote the product or the company (41%). But also the competition from local businesses (35%), and logistics related challenges (31%) as well as

the lack of a countrywide system which supports organic made in Italy (32%). And if the latter are the current challenges that companies have to face, there are many others that have to be kept in mind in the long run. Indeed, 83% of the interviewed companies think that policies should grant more effective inspections for the organic production. Moreover, 66% points out the ever-increasing agricultural material price volatility, whereas 62% claims that the international trade will get back to being fast paced. The predictions made for 2022 are nevertheless positive: the companies, which are active on the global organic market expect a 76% increase. As far as the domestic market is concerned, instead, the predictions are lower (+51%).

Alla conquista dei mercati internazionali

Il biologico made in Italy si consolida all'estero. Focus su Canada ed Emirati Arabi Uniti, al centro delle ultime analisi condotte da Nomisma, in collaborazione con Federbio. Quali i trend più distintivi del segmento biologico in

Canada e negli Eau? Quali opportunità per le imprese italiane che desiderano esportare in questi due Paesi strategici per potenziale di sviluppo e apprezzamento dei nostri prodotti? In Italia, le vendite di prodotti biologici valgono

oggi 4,5 milioni di euro. Di questa cifra, oltre il 40% deriva dalle esportazioni. Il Bel Paese, infatti, è il secondo Paese per export bio. Nel complesso, il segmento incide per il 5,9% sull'intero export agroalimentare italiano. Tra

i fattori chiave del successo all'estero figura l'elevata qualità dei prodotti, un generale interesse da parte dei consumatori stranieri per il Bel Paese e un'elevata spesa media pro-capite per i prodotti biologici.

UNITED ARAB EMIRATES

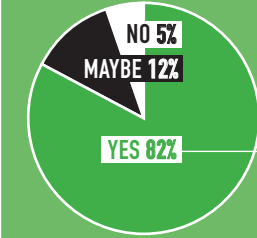
The UAE are the 32nd destination country of Italian exports. Between January and October 2021, the Italian agri-food export, both organic and conventional, amounted to 175 million euro, up by 28% compared to 2020. The exported amount to UAE accounts for 0.5% of the total made in Italy export, but there are significant growth prospects. In fact, according to Nomisma's inquiries, the Emiratis have a strong interest in the organic world. The United Arab Emirates have an estimated population of roughly 10 million people, of which 89% are foreigners and the average age is approximately 30-33 years old. The country has a high obesity rate (32%) and it represents a key development potential for the organic and made in Italy, also because the government invests profusely in health campaigns in order to promote a healthier lifestyle. Unlike Canada, the pro capita average spending for non-conventional products in the UAE is still limited (3 euro), however a 13% growth is expected in the next three years. In any case, organic products' consumer base, out of the UAE's population between 18 and 65 years old who purchased organic products at least once during the last year for domestic consumption, amounts to 53%, accounting for 1.5% on the grocery expenses. Whereas, organic consumption away from home amounts to 42%. Selection criteria for food products in the United Arab Emirates are brands (30%), price (23%) and sustainability (17%). In the latter case, consumers not only look for the organic label, but also for sustainable packaging. Non-conventional products are chosen by consumers who have been to Italy in the last 5 years (63%), have a child under 12 (58%), are women (57%), have a high income (57%) and are between 25 and 44 years old (56%). 47% of the interviewees, on the contrary, has not purchased any organic good in the last year, however these consumers would surely add an organic product to the shopping cart if it were on sale (22%) or if they found information regarding the healthiness of the food product on the label (18%). As far as distribution channels are concerned, 32% of the sales are registered in supermarkets, 30% in specialized ones and 15% in specialized or gourmet shops. Only 9% of the purchases are made online. Lastly, Nomisma's survey shows that the Emiratis are very interested in Italian organic products, however they are rarely able to find them in the stores they usually shop at.

Growth prospects for the segment

The strong presence of international citizens in the United Arab Emirates (almost 90%) leads to a high consumption of foreign products on the territory. In 2021, 9 consumers in 10 indeed purchased at least 1 food & beverage product coming from overseas. With a 43% share, Italy is the leading foreign country from which overseas food products come from, and it is followed by the USA, India and New Zealand. Italy, though, ranks second, preceded by the USA, as far as products' quality and the selection of organic goods are concerned. Quality, taste and safety are three words chosen by the Emiratis to pinpoint the guarantee of an Italian product. Moreover, 8 consumers out 10 claim to be willing to pay extra for an organic product. The organic goods for which EAU consumers think the Italian origin is the most important are: pasta, fresh products (eggs, produce, cheese), condiments and meat. Promoting Italian organic food products' communication is also key: 81% of the interviewees thinks that the annual marketing campaigns for those goods are effective, only 12% claims that there should be more of them. 82% of the consumers surveyed by Nomisma would be interested in buying an Italian organic agri-food product if they found it in their usual grocery store. 12% does not know if they would purchase it, but they would give in knowing that it is healthy, if they found information on the product or if the good was affordable. The predictions for the next five years are therefore positive. 1 consumer out of 2 claims that they will pay more attention to the food products they buy. Ultimately, consumers will buy more organic goods by 2025.

INCENTIVES FOR ORGANIC MADE IN ITALY

If starting from next week you found a new organic product made in Italy at your usual store, would you be interested in buying it?



% based on the total population 18-65 years

Which factors would convince you to buy an organic product made in Italy?



Source: project ITA.BIO Nomisma for ITA Agency - Consumer survey UAE

FoodTech 500, showcasing the innovations of the future

Forward Fooding reveals the ranking of the most promising global agrifoodtech companies. Agritech and novel food are the most represented sectors. Italy is involved too, with 24 businesses among the 'finalists'.

The agrifoodtech ecosystem is increasingly in turmoil. According to FoodTech Data Navigator, 50.4 billion dollars have been invested in startups and scaleups companies working on agrifood innovation in 2021. Figures that represent a huge step up from the 19.8 million reported in 2020, translating into a 67% jump.

During the last weeks, Forward Fooding has unveiled the latest FoodTech 500, the ranking that analyses the most promising agrifoodtech companies of the world. The aim of the initiative is to raise awareness about the potential of the sector, give visibility to the best talents and facilitate the establishment of new partnerships.

Alessio D'Antino, ceo of Forward Fooding, explained that FoodTech 500 was created in 2019 in order to give visibility to the 'underdogs' (i.e. the ones who win against the odds) in agrifoodtech and shine a spotlight on the leading global innovators, from farm to fork, who are creating impactful solutions to improve food systems. "In three years, while tracking over 70 listed companies, we have seen the industry expand significantly. This year's list", explains D'Antino, "is a testament to us that the entrepreneurial talent behind the global FoodTech industry is capable of doing great business. While, of course, doing good for the planet".

FoodTech 500 is sponsored by Neom, a urban project located in the northwestern region of Saudi Arabia near the Red Sea, and Dole Sunshine Company, among the leading suppliers of high-quality fresh and packaged fruit.

Methodology

This year's edition, the third since the beginning of the initiative, attracted more than 2,250 entries from companies located in 85 countries. From these, the top 500 were selected to compile the ranking based on three criteria. Firstly, the size of business, whose score is calculated using an algorithm that predicts the growth of the company based on financial performance indicators, such as number of employees, funding raised and active offices. Secondly, the digital footprint: this score calculates the growth of a business according to its online presence, its positioning on search engines and the number of followers on social networks. Lastly, sustainability, assessed on the basis of a selected number of objectives set by the United Nations, the 'Sustainable Development Goals': these include the contribution of companies to im-

proving the social conditions of people and the impact on the environment.

Top 10: vertical farming takes the lead

Looking more into detail, the most represented sector at global level is AgTech, i.e. innovations related to agriculture, horticulture and aquaculture, which accounts for 30.8% of the top 500 companies. In second place, Next Gen Food, the so-called 'food of the future' (such as plant-based and alternative proteins) with 26.2%. Then, then is Waste management with 10.8%, and food delivery is also close behind, accounting for 10.2% of the ranking.

Among the ten most 'virtuous' companies on the international scene according to Forward Fooding, the first place goes to Infarm, a Berlin-based company founded in 2013, which works to build a global network of urban vertical farms to grow and distribute fresh produce directly in big

cities. The silver medal went to Plenty, a US-based company created in 2014 and engaged in the development of indoor farming. Ynsect from France, which uses bug proteins to make products for pets, farmed fish, plants and even people, takes the third place. Benson Hill, an American start-up that aims to exploit the natural genetic diversity of plants to develop new seed varieties in a sustainable and cost-effective way, came fourth. Again, in the field of agriculture there are Boverly Farming (sixth place), an American vertical farming company, and Pivot Bio (eighth place), which has developed fertilizers based on nitrogen-fixing bacteria in order to replace the synthetic and more polluting ones. Completes the top 10 Notco (10th), a unicorn company from Chile that specialises in plant-based alternatives to animal products, including egg and dairy products.

One of the latest trends is waste management. The Californian company Imperfect Foods (fifth

place) and the Danish company Too Good to Go (ninth place) are both dedicated to the cause, even if with different methods: the first offers a delivery service of 'ugly but good' fruit and vegetables, while the other connects customers and businesses to sell unsold surplus food below cost.

Another increasingly popular trend, also among companies, is meal kits, i.e. home delivery of ingredients and semi-finished products needed to prepare a homemade meal. The first company in the ranking, in seventh place, is Hello Fresh, a German company listed on the Frankfurt stock exchange, which closed 2020 with a turnover of 3.7 billion euros. A business model also taken up by the Italian Quomi, in 117th place in the overall ranking.

The situation in Italy

Italy also appears in the ranking. In the 2022 edition of the FoodTech 500, 24 startups from the 'Bel Paese' have entered the

ranking (about 5% of the total). The food delivery business confirms itself as one of the leading sectors for our country: companies such as Soplaya, Orapesce and Deliveristo (which appear in the Foodtech500 in 233rd, 245th and 246th position respectively) are included in the category.

In general, Forward Fooding's analysis highlights the difficulty for Italian agrifoodtech to attract capital: according to the research, a total of 259.4 million euros have been invested in the sector during the last ten years. A figure that places us in tenth place in Europe, well behind the United Kingdom (3.5 billion euros), Spain (1.2 billion), France (1.3 billion) and Germany (1.9 billion).

Despite this, Italy ranks fourth among European countries for the number of active startups (217, after the UK, France and Spain), confirming that the Italian agrifoodtech sector is more alive than ever.

Eleonora Cazzaniga



FoodTech 500, in mostra le innovazioni del futuro

L'ecosistema dell'agrifoodtech è sempre più in fermento. Secondo i dati di FoodTech Data Navigator, nel 2021 sono stati investiti 50,4 miliardi di dollari in startup e scaleup che si occupano di innovazione agroalimentare. Cifra che rappresenta un enorme passo avanti rispetto ai 19,8 milioni riportati nel 2020, con un balzo del 67%.

Nelle scorse settimane, Forward Fooding ha svelato l'ultima FoodTech 500, la classifica che analizza le aziende agrifoodtech più promettenti a livello globale. Scopo dell'iniziativa, aumentare la consapevolezza sulle potenzialità del settore, dare visibilità ai migliori talenti e facilitare l'instaurarsi di nuove partnership.

Alessio D'Antino, Ceo di Forward Fooding, ha spiegato che la FoodTech 500 è nata nel 2019 per dare visibilità agli 'underdog', ovvero gli sfavoriti dai pronostici, in ambito agrifoodtech e accendere un riflettore sui principali innovatori globali, dalla fattoria alla forchetta, che stanno creando soluzioni di impatto per migliorare i sistemi alimentari.



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HOT TOPICS

The rise of the 'substitutes'

The plant-based market is surging, just like the related process technologies. But are these 'alternative' products really healthy options? It depends on how much processed they are, according to a recent WHO report.

Veggie patties, cheese and fish, plant-based drinks and 'artificial' eggs made from mug beans: the market of alternative proteins is booming. It's a fact. Also thanks to multi-billion investments, the support from plenty of celebs, and the fact of backing – directly and indirectly – the thesis of animal rights supporters and environmentalists. Major global technology suppliers, for their part, take advantage of this new, unexplored market.

Yet, a report issued by the World Health Organization (WHO) at the end of 2021 warns against the impact that these products, often ultra-processed and "with little, if any, whole food" in them, have on human health. Meanwhile, most of consumer think they are more nutritious than the 'originals' they imitate.

What the WHO says about plant-based diets

"Notwithstanding the health benefits of a diet rich in plant-based foods, not all plant-based diets are healthy," the WHO report, published at the end of 2021, claims. "While such diets are typically characterized in terms of the proportion of plant-based foods they contain relative to animal foods, little consideration may be given to the types

and quality of the plant foods concerned. It is common to associate plant-based diets with healthful, whole and minimally processed plant foods such as whole grains, fruits and vegetables, legumes, nuts and seeds. However, refined grains, and sugar-sweetened beverages, snacks and confectionery are foods that can still be considered 'plant-based' as they or their ingredients originate from plants and may be free from animal products".

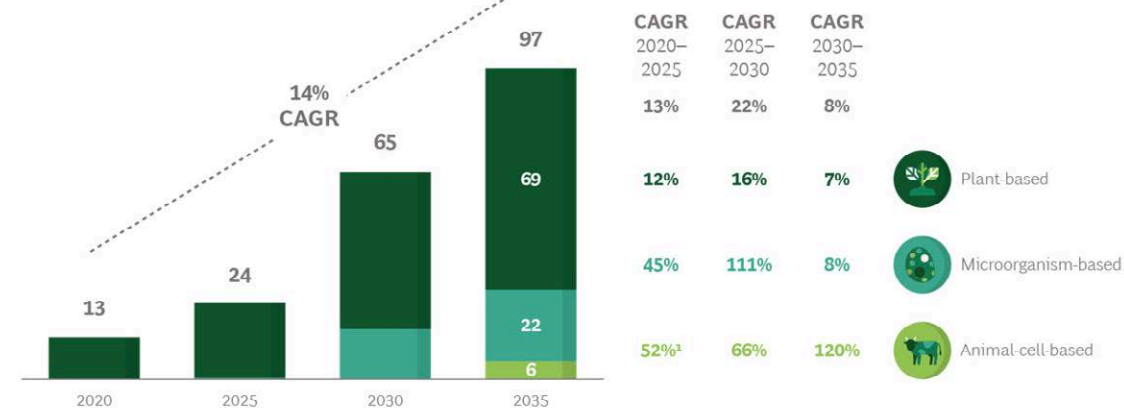
Modern plant-based diets, the WHO highlights, may therefore include ultra-processed foods like "imitation processed 'meats' (including products marketed as sausages, nuggets and burgers), beverages (for example, almond and oat 'milk'), and plant-based 'cheese' and 'yoghurt'. Ultra-processed foods, as defined by the Nova classification system, are formulations of substances derived from whole foods, such as starches, sugars, fats and protein isolates, with little, if any, whole food, and often with added flavours, colours, emulsifiers and other cosmetic additives to improve shelf-life, palatability and visual appeal. Consequently, there are significant knowledge gaps in the nutritional composition of such meat and

È iniziata l'era dei sostituti

Il mercato delle proteine alternative è in rapida crescita, così come quello delle relative tecnologie produttive. Grazie anche a investimenti milionari e al fatto di supportare, direttamente o indirettamente, le cause di animalisti e ambientalisti. Eppure, un report pubblicato dall'OMS a fine 2021 mette in guardia dall'impatto che questi prodotti, spesso ultra-processati, hanno sulla salute.

Alternative Protein Consumption Will Grow in Three Waves

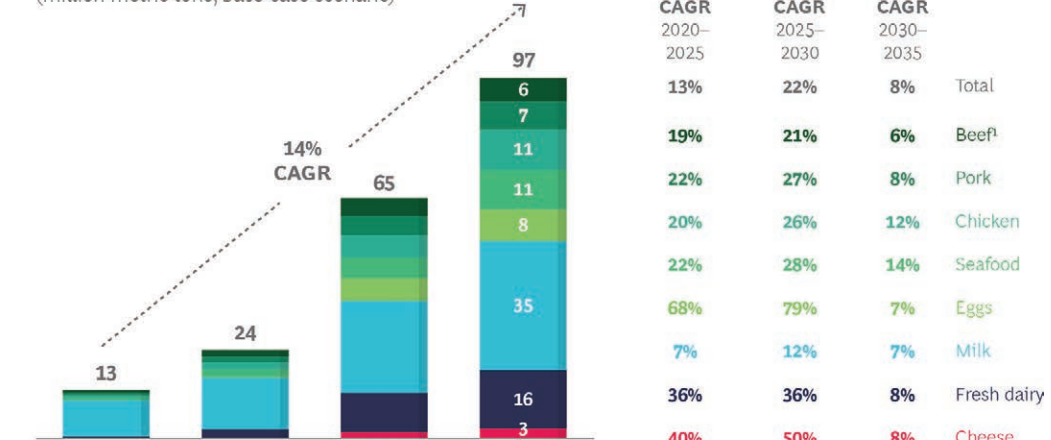
Consumption of alternative proteins by protein source (million metric tons, base-case scenario)



Sources: US Department of Agriculture; Euromonitor; UBS; ING; Good Food Institute; expert interviews; Blue Horizon and BCG analysis.
*CAGR from 2022 to 2025, starting from market entry.

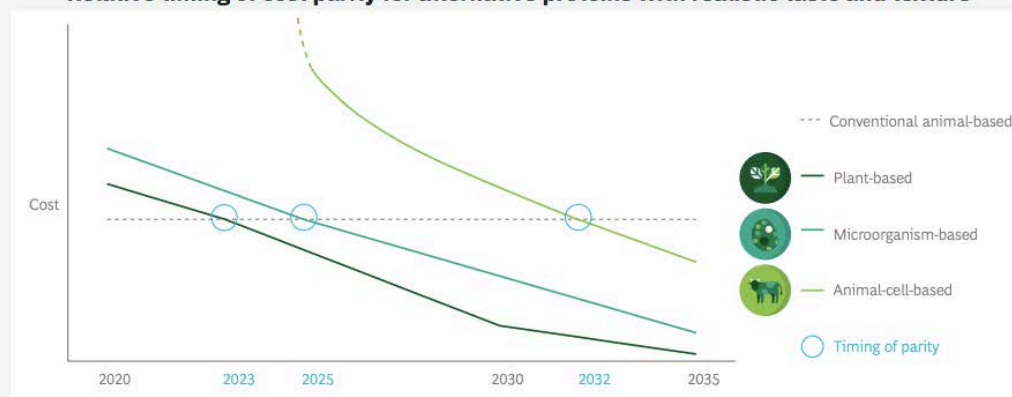
Milk and Other Dairy Alternatives Will Dominate the Market, Followed by Chicken and Seafood

Consumption of alternative proteins by product (million metric tons, base-case scenario)



Sources: US Department of Agriculture; Euromonitor; UBS; ING; Good Food Institute; expert interviews; Blue Horizon and BCG analysis.
*Including veal.

Relative timing of cost parity for alternative proteins with realistic taste and texture



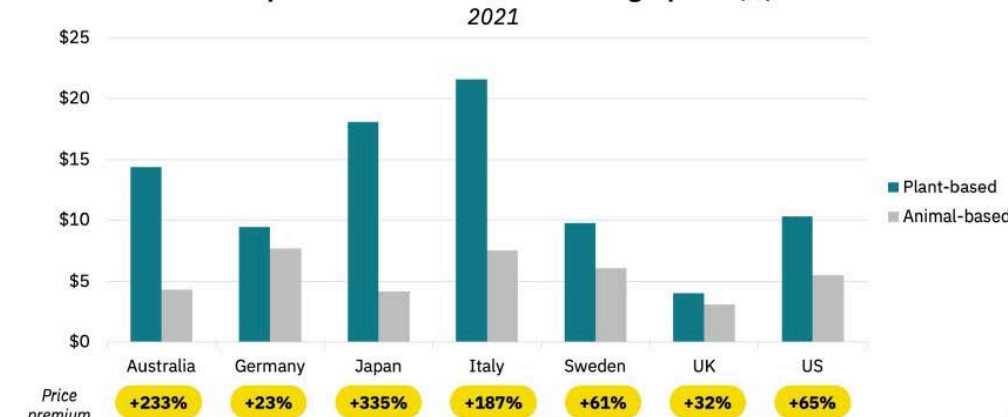
Sources: Blue Horizon and BCG analysis, expert interviews; industry report.

Note: This analysis includes illustrative data for US and EU; variations by product group and geographic area are omitted for clarity.

Source: Food for Thought by BCG x Blue Horizon

Plant-based meat is sold at a premium across geographical areas

Price of plant-based and animal-based burger patties, \$/lb.



Source: Kearney analysis

dairy substitutes, while the extent of their contribution to contemporary diets in many countries in the European Region is unclear. In addition, further research is needed to investigate the yet-unknown health impacts of the food additives and by-products formed during industrial processing of such plant-based 'meats'.

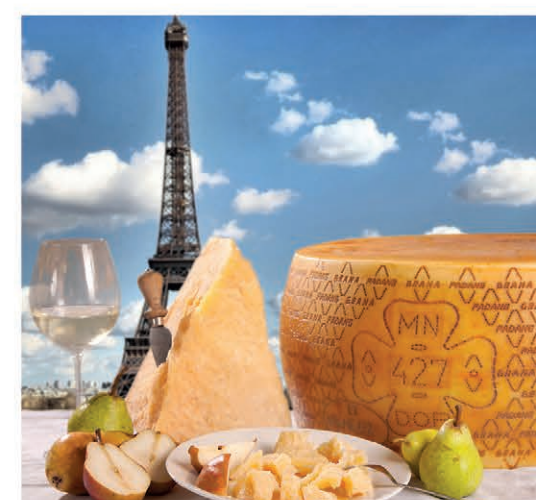
The global market for plant-based food is booming...

According to a report by Boston Consulting Group (BCG), 11% of all the meat, seafood, eggs, and dairy eaten around the globe is

very likely to be alternative by 2035. With a push from regulators and step changes in technology, that figure could even rise to 22%. In 2020, about 13 million metric tons of alternative proteins were consumed globally, just 2% of the animal protein market.

"We expect that consumption will increase to more than seven times that size over the next decade and a half, to 97 million metric tons by 2035, when the three types of alternatives [plant-based, microorganism-based, animal-cell based, ndr] will very likely make up 11% of the overall protein market. Assuming

follow





HOP TOPICS

average revenues of \$3 per kilogram, this amounts to a market of approximately \$290 billion."

As regards cost parity, for alternative proteins with realistic taste and texture, BCG expects that "plant-based alternative proteins will achieve parity by 2023, those based on microorganisms by 2025, and those based on animal cells by 2032". These dates will vary also according to the type of animal protein they replace. Plant-based burgers, for example, "are very close to parity today and may reach it within the next two years. Plant-based chicken pieces, however, will likely only reach full parity after 2023. They are already close in taste and texture but need to get less expensive in order to compete with conventional mass produced chicken. Microorganism- and animal-cell-based products will first reach parity with more expensive animal products such as meat; achieving parity with eggs and dairy will take more time."

...and manufacturers and retailers are taking note

Production costs and an adverse legislative framework have been, so far, probably the greatest obstacles to the spread of alternative products on a global scale. Consider that, up to date, Singapore (in 2020) and Qatar (in 2021) are the only nations to have approved cell-cultured meat for human consumption. But the situation could change soon.

2021 has been indeed called "the year of cultivated meat", since the sector has attracted more than 500 million dollars in funding for cell-cultivated meat technologies just in the first half of the year. According to 'Appetite for Disruption: The Last Serving', a research launched by the FAIRR Initiative, which assesses how 25 food companies and retailers are responding to the rise of alternative proteins (including both plant-based and cultivated 'meat'), the number of firms adopting formal targets for protein diversification has grown from 0 to 7 in three years. It has grown from 0 in 2018 to 28% of companies in 2021 - with Unilever, Conagra, Nestle and UK re-

tailers Tesco and Sainsbury's amongst best-performing firms.

Amazon (Whole Foods), Costco and Kraft Heinz are the worst performers, with the majority of food companies (72% - 18/25) so far failing to set any quantifiable targets for protein transition, despite high consumer demand. "Dollar sales of plant-based foods grew 43% in the last two years - the report highlights - and the US meat and dairy alternatives market grew 300% from 2019 to 2020."

The 'price gap' is shrinking

According to a study by GFI - Good Food Institute, if plant-based meat alternatives continue to expand at their current rate, they will represent 6% of total meat consumption by 2030 - which means that manufacturers will need to produce 25 million metric tons of the products per year to meet demand. The report projects that to get there, the world would need at least 800 extrusion factories, each of which is able to produce at least 30,000 metric tons of extruded protein product per year, representing a total investment of \$27 billion.

The report projects significant supply crunches for common ingredients in plant-based food to meet the hypothetical 2030 demand: 16% of the global supply of coconut oil will be needed, 34% of total pea production, 10 times the projected global supply of enriched pea protein, and 2% of total soy production - but three times the projected global supply of soy protein concentrate.

GFI also suggests that as alternative protein production scales up, economies of scale can translate into cost and price efficiencies. So far the gap is still significant - at \$3.95 for a pound of beef and \$7.79 for a pound of Beyond Meat - but as the cost of beef and pork has steadily risen in recent months, and the price of alternative meat products is expected to fall, the price gap is going to be erased by 2023.

"Progress on price parity is not only affected by reducing plant-based meat production costs, but also by market effects that raise conventional meat costs", GFI explains. "Recent pres-

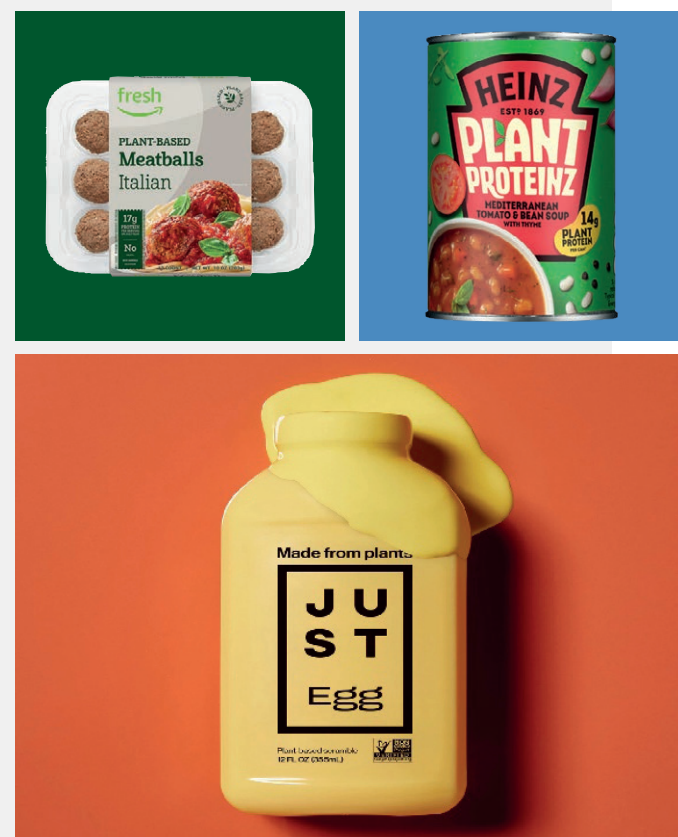


SNAPSHOTS

In Singapore, **Eat Just** is building a huge plant-protein factory (on a 2.7 hectare plot) where mung bean - that can be transformed into a protein isolate, which is a main ingredient of alternative protein products - will be the key ingredient.

Heinz is growing its plant-based offer with a new brand called Plant Protein. The fmcg giant is ploughing 2.5 million pounds into the brand, which includes a trio of canned soups: Mediterranean Tomato & Bean, Coconut Curry & Jackfruit and Moroccan Chickpea & Bell Pepper flavours will roll into the multis.

Amazon Fresh has rolled out a plant-based private label line that includes 15 products at launch, including patties, almond milk and Italian meatballs, with additional products rolling out this year.



ures such as higher input costs, meatpacker labor issues, higher worker wage rates, and supply chain interruptions have illustrated the relative volatility - and price instability - of the conventional meat supply chain. In fall 2021, conventional meat categories like beef, chicken, and pork have seen double-digit price increases compared to the same week in 2020, while plant-based meat prices compared to prior year have decreased or remained the same."

Just to make a couple of examples, in early 2021 Impossible Foods announced

its second price reduction within a year for its plant-based grounds, decreasing the suggested retail price to \$9.32/lb, a 20% drop; in October 2021, Aldi launched its Ultimate No Beef Burger in UK stores, priced at £1.99 for two quarter-pound patties, or approximately \$5.30 per pound.

What's going on in Italy?

Between September 2020 and September 2021, sales of 'alternative' products in Italian grocery retail chains experienced a 17% growth, for a turnover of 458 million euro (source: Iri), equal to

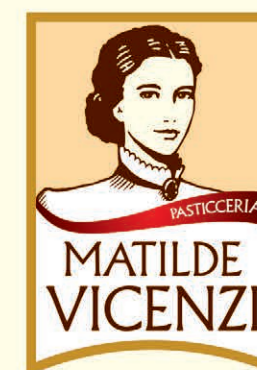
about 0.6% of all food sold in grocery retail. Italians are mainly fond of plant-based drinks (chosen by 35% of Italian households according to GfK) and gastronomy like burgers and finger food (32%). All food categories - among fresh, frozen and ambient - have experienced strong growth, in some cases up to 30%. Sales of plant-based drinks generate 220 million euro (about 11% of total sales sold in grocery retail). Plant-based burger and patties are worth 115 millions. Italy has thus become the fourth largest European market for plant-based food, on a value basis.

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*Source: Nielsen YE 2021 Italy



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The Kerry Taste Charts 2022

In its 2022 'Taste Charts' the Ireland-based Kerry Group, global supplier of in food ingredients and flavours serving the food and beverage industry, highlights the great taste trends that have shaped the f&b market in the past years and that will drive innovation in the months ahead. "Our on-the-ground presence in more than 150 global locations allows us to see, hear and taste consumer preferences from a truly global, yet locally authentic perspective", it explains. "We predict these trends using a combination of proprietary insights, menu trends, product launches and ingredient labels, consumer preferences, social media chatter, chef-led innovation, and our own direct experience of supporting thousands of new product

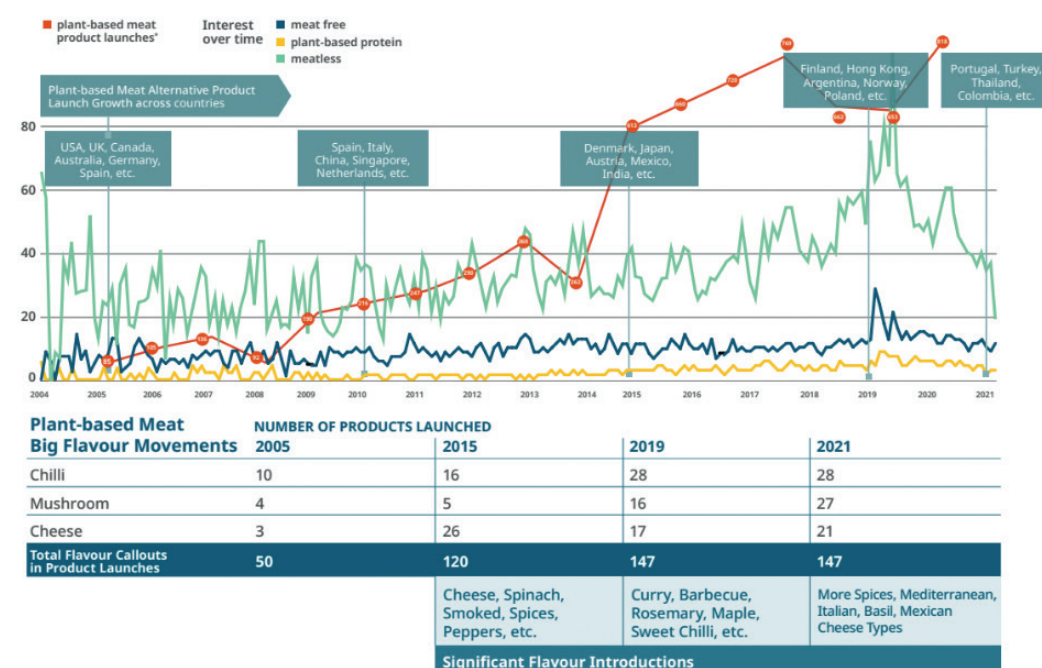
launches across the globe". Needless to say, a special focus has been dedicated, this year, to plant-based cheese and meat alternatives.

The role of flavors and ingredients

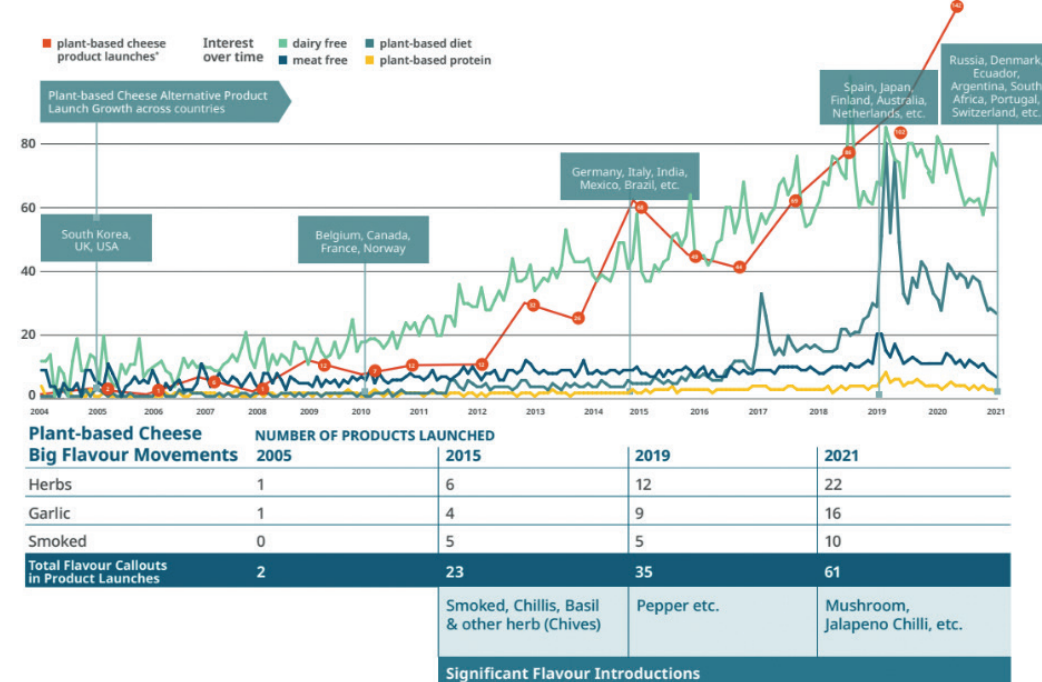
The taste lifecycle of Plant-based Cheese Alternatives and Plant-based Meat Alternatives reflects its steady growth in market launches and consumer acceptance across the globe. While nutrition and sustainability remain strong drivers of choice, the role of taste is undeniable, particularly in comparison to conventional dairy-based cheese and animal-based proteins. Flavours and ingredients play a central role in product innovation, from comfort to authentic international inspirations and the influence of taste charts on plant-based food and drinks.



TASTE LIFECYCLE OF PLANT-BASED MEAT ALTERNATIVES



TASTE LIFECYCLE OF PLANT-BASED CHEESE ALTERNATIVES



SNAPSHOTS

Denmark invests around 170 mln dollars in plant-based r&d

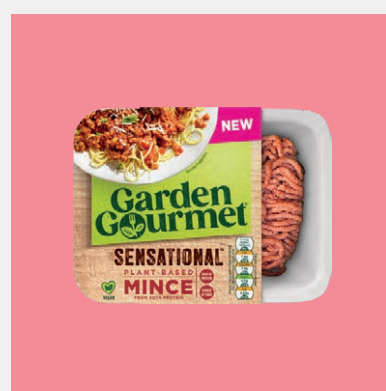
The Danish government has announced over 1.25 billion kroner (168 million euro) in funding to advance plant-based foods, as part of an unprecedented climate agreement for food and agriculture: the largest investment in plant-based r&d by any EU country to date. Under the new agreement, Denmark will create a Fund for Plant-based Food Products, providing 90 million euro over nine years to support product development and promotion.

Nestlé to produce plant-based meat in Serbia

Nestlé is to spend 73 million dollars on building a plant-based food production facility in Serbia, dedicated to the Garden Gourmet range. The factory will cover 18,440 sqm and will be located close to the existing Nestlé factory in Surčin. When it is up and running, production capacity will reach 12,000 tons per year.

Bel Brands launch its 'veg' Babybel plant-based

Launched in the United Kingdom, in January, a



plant-based version of the classic Babybel cheese snack, first launched in its mini form and distinctive red wax packaging back in 1977. The company said the new dairy-free cheese will join its existing plant-based products Boursin Dairy-Free and its entire Nurishh product line.

The Chinese market goes more and more plant-based

Interest in plant-based meat alternatives is growing in China. According to an analysis conducted by Rabobank, the market is expected to grow at a Cagr of 5.4% - 9.4% between 2021 and 2030, rising from 17 to 24 billion dollars in

2030. The 'fake' meat market, in particular, will increase from 2.1 to 9 billion dollars in 2030, with a growth in value from 54% to 81% (Cagr).

Danone invests 43 million euro in vegetable drinks

The dairy giant has announced it will invest 43 million euro to convert the facility of Villecomtal-sur-Arros, in southern France, into a plant-based site for its Alpro brand that will supply the French and European markets. With this project, Danone plans to increase the production capacity of UHT vegetable drinks of +25% by 2024 in France.



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SCENARIO



Young decision makers

Based on a survey by Doxa Junior, kids play an increasingly central role in the food purchasing process. And if licensing products boast a proven appeal, in Italy the supply is still very limited in this sense.

They are young, but they know what they want. We are talking about kids in the Generation Alpha, the first to be born entirely within the 21st century. Surrounded by technology, always connected and up to date with all the latest trends, the children born starting from 2010, notwithstanding their young age, have been slowly conquering an ever bigger purchasing power. Through their parents' wallets, of course.

This trend is especially noticeable in the food segment: indeed, it is the only category of products where an increase in the kids' influence in regards to purchasing processes was registered during the last year. In segments such as toys and clothing, their say in the matter has remained more or less equal to the previous years, whereas the food category boasts an increasingly greater consideration, even throughout the pandemic. This is shown in a survey carried out by Doxa Junior, which analyzed the answers given by parents of Italian kids between 5 and 13 years old. And the results were showcased during the Kids Marketing Days event, which took place in Milan on 10 March 2022. The conference was organized by MLD Entertainment, a hub of services for the Italian Licensing market. In a nutshell, the children who accompany their parents to the supermarket come up with increasingly specific requests. As it is for those who are not physically present during the shopping visit, but still have their parents purchase them what they want.

It is indeed usually parents who are proactive in this sense, and thus buy certain products with the specific purpose of rewarding their kids. Among the criteria considered when choosing what to buy, many aspects stand out. First of all, those regarding nutritional values, taste, brand and price. But during the decision-making process, the presence of a well-known character on the packaging might be crucial. It is indeed of

higher importance when the products are specifically designed for kids.

Licensing and food: a missed opportunity?

The opportunities to create a greater impact over the kids' target, through the licensing of known characters or brands, are still to be exploited by the Italian market, mainly in the agri-food segment. Licensing is a business model that entails the opportunity of borrowing external narrative tools for a more or less prolonged period of time. The Italian FMCG follows two different paths. The first one is the creation of its own testimonials and fixed symbols, which continuously bear the brand values: it is the case for Parmareggio's connoisseur mouse, Cameos's Mucca Muu Muu, as well as Carletto, the histrionic Chameleon, which is Findus' standard bea-

rer for all the Sofficini range. But creating an ad hoc character from scratch for a product or a brand is a long and expensive process. For this reason, many companies opt for something that already exists, attributing to their products external values borrowed from characters which vary according to the needs of communication at a given time, such as Kinder Ferrero and Funko. The advantage lies in the fact that a pre-existing licensing entails an enormous fanbase, which only media companies can back up. In the latter case, the 'corporate testimonial' strategy can be applied: it is long-term oriented and it consists in the continuous and frequent creation of contents. Or, for more strategic purposes, companies can rely upon the 'hop on/hop off' model, which can be tailor-made for a specific event according to the occasion's needs and it only lasts for a limited period of time.

The Italian model and Warner Bros.'s case

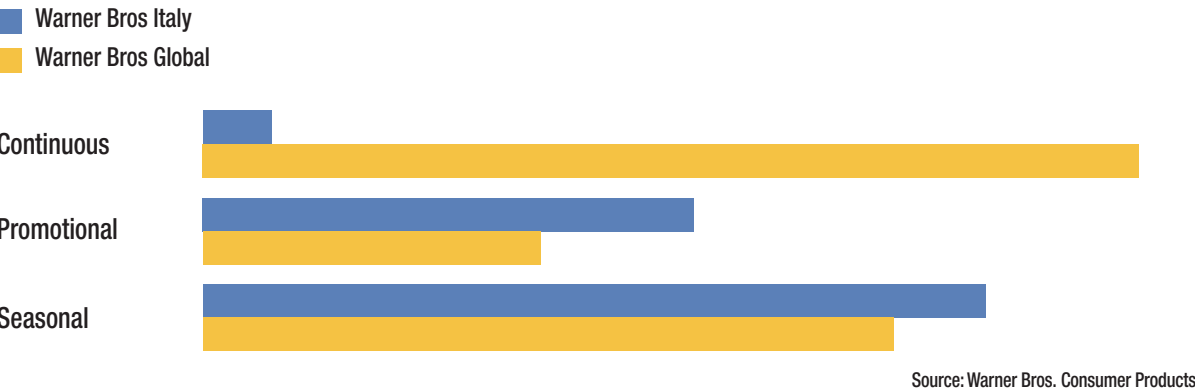
The latter model frequently characterizes the Italian FMCG. Companies choose a character, a brand, or in general a licensing in order to increase their sales, especially during the main festivities throughout the year: Easter, Christmas, Halloween, Epiphany. A clear example of licensing policies applied to the food segment is provided by Warner Bros. Consumer Products. "Food is one of the main categories for our licensing, and the largest share of our business derives from seasonal occasions, especially for sweets and confectionery goods", explain Laura Gallucci and Silvia Duravia, director consumer products and FHB category manager in Warner Bros, respectively. "We work profusely on festivities mainly with the market's leaders. The second largest driver of the turnover is the promotional segment. These are not continuous products, but 'one shot' operations, which are linked to special moments and that remain on the shelves for a limited period of

time, as it has happened with the latest on-pack initiative for the launch of the film Space Jam on the Oro Ciok Saiwa".

The Warner brands which boast the widest presence on the shelves are Looney Tunes, Tom & Jerry, the DC Comics universe (Justice League or the single characters such as Superman, Batman, etc.) and Harry Potter. This aspect definitely combines the Italian market with the foreign ones. But there are also some significant differences compared to the other countries. "In Italy, licensing has a very high penetration", add the two Warner managers, "which is though limited to certain periods of the year, or to specific events - such as an important premieres in cinemas. Our country is one of the most developed in regards to seasonal products. Overseas, instead, continuous products rule the roost". But what are the reasons behind this all-Italian 'anomaly'? In order to try and give an explanation, during the conference at the Kids Marketing Days, a real-time inquiry was launched. All the people in the room were asked to vote through QR Code. Among the identified causes, the perception (probably inaccurate) of the high costs of the licensing, which would affect the marginality, stands out. This element is immediately followed by a certain rigidity attributed to the distribution and a higher focus on the development of their own brands.

In conclusion, there are many business opportunities, which are only partially seized by companies in order to effectively reach the big consumer share represented by kids. And, by exploiting this 'empty space' on the shelves they can indeed obtain a larger impact in terms of visibility. Appealing especially to those names, which are able to draw the attention of the younger consumers, which are actual tie breakers when it comes to grocery shopping.

What does the Italian and foreign licensing offer consist of?



What are the reasons behind the fact that in Italy the continuous food and kids' licensing is so limited?





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