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# THE ITALIAN FOOD MAGAZINE

BUYER'S • GUIDE

YEAR 9 - N° 1 • JANUARY 2021  
MANAGING DIRECTOR: ANGELO FRIGERIO

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Editore: Edizioni Turbo Srl - Corso della Resistenza, 23 - 20821 Meda (MB) - Tel. +39 0362 600463/4 Fax. +39 0362 600616 - Stampa: Ingraph - Seregno (MB) - Poste Italiane Spa  
Sped. in Abbonamento Postale DL 353/2003 (conv. in L. 27.02.2004, n.46) art. 1, comma 1, LO/MI - In caso di mancato recapito inviare al CMP di Milano Rorerio per la restituzione al mittente previo pagamento resi.

## PRODUCT SHOWCASE

# WHAT A SWEET (AND SAVOURY) BUSINESS

Chocolate bars and pralines, candies and biscuits, as well as breadsticks, taralli, ice creams and cakes. The Italian confectionery and bakery industries kick off 2021 with a host of new and innovative products, featuring more performing packs and original tastes. In the following pages, a selection of the most interesting product launches.

FROM PAGE 16 TO PAGE 22

## ZOOM

# Meat market: what to expect in 2021?

Rabobank takes stock of the situation on a global scale. Considering the effects of the pandemic and the trend of African swine fever. China expected to be the leader of pork production again.

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## COVER STORY

# Gorgonzola according to Giacomo Poletti

Palzola's ceo thinks back to the history of his company. And explains what makes his cheese unique.

page 9



## TRADE

# Welcome to Norway

The insufficient local food production encourages exports to the Northern country. A market though regulated by custom tariffs and an oligopolistic distribution system.

pages 32 and 33

## THE STUDY

# Europeans like sustainable shopping

Did Coronavirus make consumers forget about environmental issues? Are they still interested in choosing eco-friendly packaging? The GfK report #WhoCaresWhoDoes investigates the relation between companies' CSR and purchasing habits across Europe.

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## INTERVIEW

# Japan: instructions for use

Old and new consumption habits in a country which cares a lot about tradition. But which is in love with innovations. A market full of opportunities for food & beverage Italian companies. Provided that... Interview with Emanuele Bonsignore, deputy president of Aeon Italy.

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## ZOOM

# The Chocolate War

The drop in demand owing to Covid-19. The payment of the tax on the crop. The purchases through the futures market. The clash between multinationals, Cote D'Ivoire and Ghana.

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## FOCUS ON

# 'Snackification' mania

Innovative, single-dose, with recyclable packaging. The global snack market is rapidly increasing. The main trends in a report by Euromonitor International.

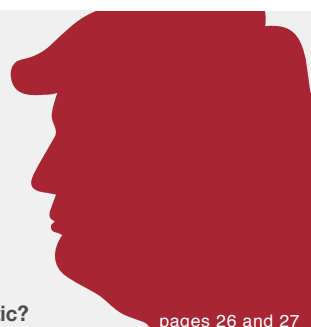
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## TRADE

# Harsh tariffs

Duties imposed by the Trump administration and the effects of the pandemic have slapped on Italian exports of deli meats and cheeses. Will Biden start a new era of economic relationships between the two sides of the Atlantic?

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## OUTLOOKS

# Get a share of this cake

An in-depth focus, by Euromonitor International, on the Chinese bakery and confectionery market, which is expected to double its values over the next five years.

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## EDITORIAL

by Federica Bartesaghi

# Trade shows, how we miss you

Confirmed, postponed, cancelled, rescheduled. Since the beginning of the pandemic, a year ago, the big international trade shows have been living through months of anguish and uncertainty. The question, for all of them, is always the same: what is the right thing to do for all of the actors involved in this great and gigantic show?

And in the case of trade fairs, let me say it, there is a plenty of them. Organizers, just to begin with, as well as the exhibiting companies, their own collaborators and booth manufacturers. Visitors, of course, and journalists, but also hotels, restaurants, bars, airlines and railways and all those activities that take advantage of events capable of moving millions of people from hundreds of countries. And the impossibility of guaranteeing mobility between countries, combined with the continuous alternation of 'full speed ahead' and 'back all', has meant that, one after another, all the major trade exhibitions scheduled for 2020 - and often in the first half of 2021 - have raised the white flag.

In the food & beverage sector, this is the case of Tuttofood, the great Milan-based food event, which from May has been postponed to October 2021. Likewise Cibus, the flagship event of the Parma Fair, after cancelling the 2020 edition has confirmed the 2021 one, yet moving it from May to June (or September, depending on the decisions that the Board will make in the coming weeks). The wine world is no exception, with Vinitaly - the largest wine

event in Italy and among the largest in the world - that after skipping the 2020 edition is now looking forward to the new dates in June 2021. But the situation is gloomy both in Italy and abroad: the German Prowein will not be held until 2022, and so will Ism, the snacks and confectionery trade show.

In some (few) cases, trade fair organizers have tried to exploit the potential of the internet, offering digital or 'hybrid' events. The same thing happened with some large companies, which tried to replace trade fairs with 'digital showcases' where to display potential buyers their latest product innovations. A good example of resourcefulness, of course, but still a palliative. The truth is that the real strength of trade fairs lies in face-to-face meetings and in the possibility of discussing projects and products over a cup of coffee. After all, how can you choose to buy tons of deli meats or cheeses if you don't know their taste or scent?

Waiting for the long-awaited return to the old, reassuring forms of relationship and business, what operators have to do now is communicate. Communicate their innovations, their desire to stay on the market, not to see nullified the labors and efforts of a lifetime.

With *The Italian Food Magazine*, our magazine dedicated to the Italian food and beverage market, which turns 9 this year, that's what we are trying to do. Thanks for your trust. And happy new year to all.

## Fiere, quanto ci mancate

Confermate, posticipate, annullate, riprogrammate. Da inizio pandemia, ormai un anno or sono, le grandi fiere internazionali hanno vissuto mesi di angoscia e profonda incertezza. La domanda, per tutti, è sempre la stessa: qual è la cosa giusta da fare per gli attori coinvolti in questo grande e grandioso spettacolo?

E nel caso delle fiere, lo possiamo dire, sono davvero tanti. Gli organizzatori, tanto per cominciare, così come le aziende espositrici, i rispettivi collaboratori e le società di montaggio degli stand. I visitatori, naturalmente, e i giornalisti, ma anche alberghi, ristoranti, bar, compagnie aeree e ferroviarie e tutto l'indotto generato da eventi capaci di muovere milioni di persone da centinaia di Paesi. E proprio l'impossibilità di garantire la mobilità tra le frontiere, sommata al continuo alternarsi di 'via libera' e 'fermi tutti', ha fatto sì che, uno dopo l'altro, tutti i grandi eventi fieristici programmati nel 2020 - e spesso nella prima metà del 2021 - abbiano alzato bandiera bianca.

Nel mondo del food & beverage è il caso di Tuttofood, il grande salone dell'alimentare milanese. Che dal mese di maggio è stato posticipato a ottobre 2021. Allo stesso modo Cibus, evento fiore all'occhiello della Fiera di Parma, dopo l'annullamento dell'edizione 2020 ha confermato l'edizione 2021 spostandola però da maggio a giugno (o a settembre, a seconda delle decisioni che prenderà l'esecutivo nelle prossime settimane). Non fa eccezione il mondo del vino, con Vinitaly - la più grande manifestazione del vino in Italia e tra le più grandi al mondo - che saltata l'edizione 2020 guarda ora con fiducia al ricollocamento a giugno 2021. Ma la situazione è tanto grigia in Italia quanto all'estero: Prowein non si terrà fino al 2022, e così anche Ism, il salone tedesco del dolciario.

Sono solo esempi, ma la lista è lunga e coinvolge gli enti fieristici di buona parte del mondo.

In alcuni (pochi) casi, si è scelto di provare a sfruttare le potenzialità del web offrendo appuntamenti digita-

li o 'ibridi'. Lo stesso vale per molte grandi aziende del settore, che hanno sostituito le fiere con 'vetrine digitali' dove raccontare ai potenziali acquirenti le ultime novità. Un bell'esempio di intraprendenza, certo, ma pur sempre un palliativo. La verità è che la vera forza delle fiere sta proprio nell'incontro, nel faccia a faccia, nel discutere davanti a un caffè di progetti e prodotti. D'altronde, come si può scegliere di acquistare tonnellate di salumi o formaggi senza conoscerne il sapore e il profumo?

Aspettando quindi il tanto agognato ritorno alle abituali, rassicuranti forme di relazione e business, agli operatori del settore non resta che comunicare. Comunicare le proprie novità, la voglia di continuare a esserci, di non vedere vanificato il lavoro e lo sforzo di anni.

Con *The Italian Food Magazine*, la nostra rivista dedicata al mercato alimentare e delle bevande italiano, che quest'anno compie 9 anni, cerchiamo di fare proprio questo. Grazie della vostra fiducia. E buon anno a tutti.



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## NEWS

### POLAND: ITALY PROVES TO BE THE FIRST WINE SUPPLIER

Ita, the agency for the promotion abroad and the internationalization of the Italian companies, informs that Italy proves to be the first wine supplier in Poland, with a market share of 25.7% and a value of exports equal to 85.6 million Euros. In second place there are the United States (with a market share of 11.1%). They are followed by France (10.9%). It is estimated that in 2020 Poland imported wine for 333.4 million Euros, with a rise of almost 3%.



#### Polonia: l'Italia si conferma primo fornitore di vini

L'ice agenzia per la promozione all'estero e l'internazionalizzazione delle imprese italiane fa sapere che l'Italia che si conferma il primo fornitore di vini in Polonia, con quota di mercato del 25,7% e valore delle esportazioni pari a 85,6 milioni di euro. Al secondo posto si posizionano gli Stati Uniti (con quota di mercato dell'11,1%). A seguire la Francia (10,9%). Si stima che nel 2020 la Polonia abbia importato vino per 333,4 milioni di euro, registrando una crescita di quasi il 3%.

### EATALY: NEW OPENING IN LONDON IN SPRING

The Italian food store Eataly does not stop and, in spring, will arrive in London as well. In an interview given to the magazine Economy, Oscar Farinetti, the owner of the chain, declares: "On 18th March we will open an immense Eataly of 5 thousand square metres in front of Liverpool Station, we have entered into partnership with Selfridges, Harrods' main and more prestigious competitor." The announcement of the London opening was made some weeks before the inauguration of the shop in Dallas (Texas) on 9th December 2020 and before the launch of Green Pea, a sustainable superstore in the Lingotto district of Turin.



#### Eataly: nuova apertura a Londra in primavera

La catena italiana Eataly non si ferma e, in primavera, sbarcherà anche a Londra. In un'intervista rilasciata alla rivista Economy, Oscar Farinetti, patron della catena, dichiara: "Il 18 marzo apriremo un immenso Eataly di 5mila metri quadrati di fronte alla Liverpool Station, abbiamo fatto società con Selfridges, il principale e più prestigioso concorrente di Harrods". L'annuncio dell'apertura londinese arriva a poche settimane dall'inaugurazione del negozio di Dallas, in Texas, avvenuta il 9 dicembre, e dal lancio di Green Pea, un superstore sostenibile al Lingotto di Torino.

### BREXIT DEAL, ITALIAN WINE GROWERS' RELIEF: THE UK ABSORBS 8% OF THE EXPORTS

With the Brexit deal, Italian wine is safe from duties and export quotas in the UK. Indeed, the Country is the third most important market absorbing 8% share of shipments abroad. According to the Italian statistics institute (Istat), in 2019, wine exports to Great Britain reached 770 million Euros, a negative trend compared to 2018 anyway. And in 2020, due to Covid-19, the decrease was -9.2%, with sparkling wines, among the most appreciated across the Channel, which recorded -20.6%. So, the deal allows Italian producers to breathe a sigh of relief. "The agreement reached between Jonhson and Von der Leyen is absolutely fundamental for us, the producers of Prosecco Superiore, because in just 30 years' time England has become the main overseas market for our product," comments Gianluca Bisol from the namesake winery. "I do not want to imagine what an impact a no deal would have had on such an important issue as free trade between Europe and England. It would certainly have significantly reduced the achievements made on that market over the last 30 years."



#### Accordo Brexit, il sollievo dei viticoltori italiani: il Regno Unito assorbe l'8% dell'export

Con l'accordo sulla Brexit, il vino italiano è al riparo da dazi e quote sulle esportazioni nel Regno Unito. Il Paese è infatti il terzo mercato più importante assorbendo l'8% delle spedizioni all'estero. Secondo l'istituto italiano di statistica (Istat), nel 2019, le esportazioni di vino verso la Gran Bretagna hanno toccato i 770 milioni di euro, trend comunque in calo rispetto al 2018. E nel 2020, causa Coronavirus, il calo è stato del 9,2%, con le bollicine, tra i vini più amati Oltremarica, che hanno toccato il -20,6%. L'accordo consente dunque ai produttori italiani di tirare un sospiro di sollievo. "L'accordo raggiunto tra Jonhson e Von der Leyen è di fondamentale importanza per noi produttori di Prosecco Superiore in quanto l'Inghilterra in soli 30 anni è diventata il principale mercato oltre confine per il nostro prodotto", commenta Gianluca Bisol dell'omonima cantina. "Non voglio immaginare quali esiti avrebbe avuto un no deal su un tema così importante quale il libero scambio tra Europa e Inghilterra, sicuramente avrebbe depresso in maniera importante le conquiste fatte su quel mercato in questi 30 anni".

### COFFEE: GLOBAL PRODUCTION FELL IN 2020, BUT EXPORTS SLIGHTLY INCREASED

The International Coffee Organization esteems that in 2020 the global coffee production fell by 1.6% compared to 2019, stopping at 168.5 million bags. Indeed, Arabica output decreased by 5%, stabilizing at 95.7 million bags. On the contrary, Robusta reached 72.3 million bags, stepping up production by 3.2%. In October 2020 the world coffee demand diminished by 0.9% (equal to 167 million bags) producing a surplus of 961 thousand bags compared to consumption. As for global exports, a slight rise was recorded compared to 2019. While in October 2019 the monthly export was about 9.37 million bags, in October 2020 it amounted to 9.67 million. Robusta annual exportations increased, totaling 49 million bags compared to the 48.6 million of the previous year. Instead, Arabica exports decreased, from 83.8 to 78.4 million bags.

#### Caffè: nel 2020 produzione mondiale in calo, ma export in lieve aumento

L'International Coffee Organization stima che la produzione mondiale di caffè per l'anno 2020 sia diminuita dell'1,6% rispetto al 2019, fermandosi a quota 168,5 milioni di sacchi. La produzione di Arabica, infatti, è diminuita del 5%, attestandosi a 95,7 milioni di sacchi. Al contrario, Robusta ha raggiunto quota 72,3 milioni di sacchi, incrementando la produzione del +3,2%. A ottobre 2020 la domanda globale di caffè è diminuita dello 0,9% (pari a 167 milioni di sacchi) generando un surplus di 961mila sacchi rispetto al consumo. Per quanto riguarda le esportazioni mondiali, si è registrato un lieve aumento rispetto al 2019. Se al mese di ottobre 2019 l'export mensile si aggirava intorno ai 9,37 milioni di sacchi, a ottobre 2020 ammontava a 9,67 milioni. È cresciuta l'esportazione annuale di Robusta, che ha raggiunto 49 milioni di sacchi a discapito dei 48,6 milioni dell'anno precedente. È calato, invece, l'export di Arabica, che da 83,8 milioni di sacchi si è fermato a quota 78,4 milioni.

### PECORINO ROMANO PDO CHEESE, THE CONSORTIUM THINKS OF NEWS PRODUCTS AND HEADS EASTWARD

The Consortium for the protection of Pecorino Romano Pdo cheese thinks of new products. Between them there are some dedicated to the most demanding consumers: Halal and Kosher certified products for the Islamic and Jewish markets, and 'diversified' cheeses, such as the mountain pecorino, the low-salt one and a cheese with a ripening of over 14 months. All of them are produced with Sardinian milk in Sardinia. Most of these products are exported to the United States, but the EU market is growing too, and the newly elected president Gianni Maoddi asks to maintain the disciplinary open "to keep up with the times." The Consortium bets on gourmet products, without forgetting the industrial segment. Therefore, it does not fear Brexit, with the aim of relaunching the Italian, European and Far Eastern market, where to win Japanese restaurants.

#### Pecorino Romano Dop, il Consorzio pensa a nuovi prodotti e punta a Est

Il Consorzio del Pecorino Romano Dop pensa a nuovi prodotti. Sul tappeto, referenze per i palati più esigenti, prodotti certificati Halal e Kosher per i mercati islamico ed ebraico e formaggi 'diversificati', ad esempio a basso contenuto di sale, con stagionatura di oltre 14 mesi e di montagna. Tutti prodotti con latte sardo in Sardegna. La maggior parte di questi prodotti viene esportata negli Stati Uniti, cresce però anche il mercato Ue e il neo eletto presidente Gianni Maoddi chiede di tenere aperto il disciplinare "per essere al passo coi tempi". Il Consorzio punta sui prodotti gourmet, senza dimenticare il segmento industriale. Nessuna paura, dunque, della Brexit con l'obiettivo di rilanciare il mercato italiano, europeo e dell'Estremo Oriente, dove conquistare le tavole della ristorazione giapponese.

THE ITALIAN  
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THE ITALIAN FOOD MAGAZINE  
Managing director: ANGELO FRIGERIO  
Edited by: Edizioni Turbo Srl - Palazzo di Vetro  
Corso della Resistenza, 23 - 20821 - Meda (MB)  
Tel. +39 0362 600463/4/5/9  
Fax. +39 0362 600616 - e-mail: info@tespi.net  
Anno 9 - numero 1 - gennaio 2021

Periodico bimestrale - Registrazione al Tribunale di Milano n. 38  
del 25 febbraio 2015 - Stampa: Ingraph - Seregno (MB)

Poste Italiane Spa - Sped. in Abbonamento Postale DL 353/2003  
(conv. in L. 27.02.2004, n.46) art. 1, comma 1, LO/MI

Una copia 1,00 euro - Abbonamento annuo 20,00 euro  
L'editore garantisce la massima riservatezza dei dati personali in suo possesso. Tali dati saranno utilizzati per la gestione degli abbonamenti e per l'invio di informazioni commerciali.  
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Responsabile dati: Angelo Frigerio  
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## NEWS

### OPAS: THE EUROPEAN COMMISSION GIVES THE CHINESE PROMOTION PROJECT THE GO-AHEAD

The European Commission has approved the Opas' internationalization triennial project for the promotion of products based on pork, guaranteeing a financing of 3.6 million Euros. Opas (Pig breeders product organization) is the biggest product organization in Italy, responsible for 12% of the Italian pig farming. Its project, named Eat and Think Pink China, will affect all the Chinese major cities through the participation in more than eight fairs. "With Brussels' go-ahead to this new project," explains Lorenzo Fontanesi, president of Opas, "we want to give a new impulse to the internationalization field. [...] We owe this strategy to the over 80 associated farmers who guarantee a product which is absolutely in line with the most current food requirements but which also presents rigorous characteristics of respect of animal welfare, product traceability and environmental sustainability."

#### Opas: via libera della Commissione Ue al progetto di promozione in Cina

La Commissione europea ha approvato il progetto triennale di internazionalizzazione di Opas per la promozione di prodotti a base di carne suina, garantendo un finanziamento di 3,6 milioni di euro. L'Opas (Organizzazione prodotto allevatori suini) è la più grande organizzazione di prodotto in Italia, responsabile del 12% della suinicoltura italiana. Il progetto, denominato Eat and Think Pink China, toccherà tutte le maggiori città cinesi attraverso la partecipazione a oltre otto eventi fieristici. "Con l'ok di Bruxelles a questo nuovo progetto", spiega Lorenzo Fontanesi, presidente di Opas, "vogliamo imprimere una nuova velocità all'ambito dell'internazionalizzazione. [...] Questa strategia la dobbiamo agli oltre 80 imprenditori agricoli associati che garantiscono un prodotto assolutamente in linea con le esigenze alimentari più attuali ma che presenta anche rigorose caratteristiche di rispetto del benessere animale, di tracciabilità dei prodotti e di sostenibilità ambientale".

### IN ITALY 92% OF PALM OIL IS RSPO CERTIFIED

The annual report for 2020 presented by the Italian union for sustainable palm oil underlines that, in 2019, the percentage of certified product used by the Italian food industry has more than doubled. In 2017 it amounted to 43%, while in 2019 it reached 92%. This figure comes close to the goal of 100% of the total production, expected by 2020 by the Amsterdam declaration of 2015. The palm oil which is used holds Rsso certification, the maximum international standard which guarantees the provenance from sustainable cultivations. Italy counts 226 companies associated with Rsso and is ranked fifth in the world. Il Sole 24 Ore newspaper esteems that the value of these companies' share is equal to 40% of the Italian market. Instead, at international level only 19% of the product employed results to be certified.

#### In Italia il 92% dell'olio di palma ha ottenuto il certificato di sostenibilità Rsso

Il report annuale 2020 dell'Unione italiana per l'olio di palma sostenibile sottolinea che, nel 2019, la percentuale di prodotto certificato utilizzato dall'industria alimentare italiana è più che raddoppiata. Nel 2017 ammontava al 43%, mentre nel 2019 è arrivata a toccare il 92%. Il dato sfiora l'obiettivo del 100% della produzione totale, previsto entro l'anno 2020 dalla dichiarazione di Amsterdam del 2015. L'olio di palma utilizzato detiene la certificazione Rsso, il massimo standard internazionale che garantisce la provenienza da coltivazioni sostenibili. L'Italia conta 226 imprese associate Rsso e si posiziona al quinto posto nella classifica internazionale. Il Sole 24 Ore stima che la quota a valore di queste aziende sia pari al 40% del mercato italiano. A livello internazionale, invece, solo il 19% del prodotto impiegato risulta certificata.



### VALSOIA PERFECTS THE AGREEMENT WITH WEETABIX. IT WILL DISTRIBUTE OREO O'S CEREALS IN ITALY

New agreement between the Italian food company Valsoia and Weetabix, English company controlled by Post Consumer Brands, for the exclusive distribution in the Italian territory of breakfast cereals under Oreo O's brand from January 2021. The production and the marketing of the new products have been licensed to Weetabix by Mondelez International, the owner of the brand. The new partnership aims to strengthen the collaboration with Valsoia, which is already distributor in Italy for the cereals of the English group. The breakfast cereals market is growing in Italy and, by 2020, it is expected to have reached a value of more than 370 million Euros for consumption, explains Valsoia in a note. The Italian company estimates that the entry of the new Oreo O's brand cereals will stabilize at about 4 million Euros in the first years of distribution.



#### Valsoia perfeziona l'accordo con Weetabix.

##### Distribuirà i cereali Oreo O's in Italia

Nuovo accordo tra l'azienda alimentare italiana Valsoia e Weetabix, società inglese controllata da Post Consumer Brands, per la distribuzione in esclusiva sul territorio italiano dei cereali per la prima colazione a marca Oreo O's a partire dal gennaio 2021. La produzione e commercializzazione delle nuove referenze è stata concessa in licenza a Weetabix da Mondelez International, titolare del marchio. La nuova partnership mira a rafforzare la collaborazione con Valsoia, già distributore in Italia per i cereali del gruppo inglese. Il mercato dei cereali per la prima colazione è in crescita in Italia e, per il 2020, si stima che abbia raggiunto un valore superiore ai 370 milioni di euro al consumo, spiega una nota di Valsoia. Che prevede che i ricavi generati dai nuovi Oreo O's si attesteranno intorno ai 4 milioni di euro nei primi anni di distribuzione.

### TUTTOFOOD POSTPONED TO OCTOBER 2021

After the postponements during 2020 and 2021, another trade show changes date. It is Tuttofood, which was supposed to take place from 17th to 20th May. Instead, it has been rescheduled from 22nd to 26th October, parallel to Host. Tuttofood is the b2b fair for the whole agrifood market. Global and innovative, it is one of the points of reference for producers and distributors of the whole food and beverage chain, who meet buyers at the event. On the other side, Host Milano is the global fair dedicated to out-of-home eating and hospitality, an international hub which puts professionals in contact. Both events take place at Rho Fiera Milano. What puzzles is the almost simultaneousness with Anuga, the fair that will take place from 9th to 13th October in Cologne.

#### Tuttofood posticipata a ottobre 2021

Dopo gli slittamenti nel corso del 2020 e del 2021, un'altra fiera cambia data. Si tratta di Tuttofood, che avrebbe dovuto svolgersi dal 17 al 20 maggio, ed è stata invece riprogrammata dal 22 al 26 ottobre, in contemporanea con Host. Tuttofood è la fiera b2b per l'intero mercato agroalimentare. Globale e innovativa, è tra i punti di riferimento per produttori e distributori dell'intera filiera del food and beverage, che incontrano in manifestazione i buyer. Host Milano è invece la fiera mondiale dedicata al settore della ristorazione e dell'accoglienza, un hub internazionale che mette in contatto i professionisti. Entrambe le manifestazioni si svolgono a Rho Fiera Milano. Lascia perplessi la quasi contemporaneità con Anuga, la fiera che si svolgerà dal 9 al 13 ottobre a Colonia.



## COVER STORY

# Gorgonzola according to Giacomo Poletti

Palzola's ceo thinks back to the history of his company. And explains what makes his cheese unique.

"A lot of adjectives can describe the perfect Gorgonzola. It must be creamy and straw-coloured, with light green streaks in the paste. The flavour must be only slightly spicy," in this way Giacomo Poletti, ceo at Palzola, historic cheese factory in Cavallirio (Novara), describes his flagship product.

The history of the Palzola cheese factory starts in 1948. The protagonist is Renato Paltrinieri, who founded a dairy shop: at first there were pigs, for the whey, with which they were fed, while milk was mostly sold fresh. Only the excess was transformed into gorgonzola in order to be sold at the market of Novara. Considering the success of the product, Paltrinieri decided to increase its production, which was made over to the seasoners or to some great companies in Novara. It was a semi-industrial production, realized on behalf of third parties. In 1988, Paltrinieri looked for partners and found on his own way Sergio and Roberto Poletti, who had the same surname but no relationship. He continued in office, as general manager of the company, for five years, to teach them the trade, until 1993, with the



official launch of the brand Palzola, with which the products of the company are commercialized. In that same year, beside producing gorgonzola, the company also started ripening all wheels. The production gradually reached 400 wheels per day. Even today, the company is led by Roberto and Sergio Poletti.

It is right Giacomo Poletti, Sergio's son and current ceo, who tells us how the Palzola Gorgonzola was created. "Passion is a fundamental ingredient of our Gorgonzola. It is necessary to give character to the product. Indeed, the experience and the sensitivity of those who work it are essential," explains Po-

#### Il Gorgonzola secondo Giacomo Poletti

L'amministratore di Palzola ripercorre la storia dell'azienda. E spiega cosa rende unico il suo formaggio, prodotto nella provincia di Novara sin dagli anni '50: "La passione è un ingrediente fondamentale del nostro Gorgonzola. È necessaria per dare carattere al prodotto. È fondamentale infatti l'esperienza e la sensibilità di chi lo lavora".

point," continues Poletti, "Tos, the person in charge of the selection, with Florian and all the components of the department, thanks to his own experience, checks that the ripening turns out for the best. In short, he determines if Gorgonzola has that character, which is our pride."

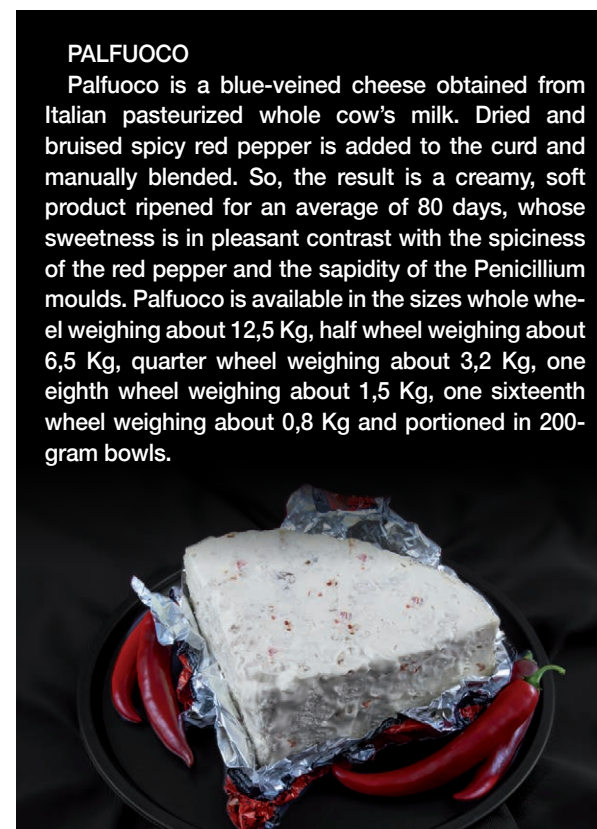
However, in addition to the dairymen's manual skill, also technology is important, exclusively used to guarantee the food safety of the final product, interpreted as traceability of the chain, observance of the designation of origin, genuineness of raw materials, hygiene of production and everything related to the safety and the satisfaction of final consumers. For this reason, the company has received the Brc and Ifs certifications.

"We want to grow and improve ourselves; we want to make the best gorgonzola in the world," explains Giacomo Poletti. "This means for us, working without twisting the manual skill which belongs to the millenary tradition of this cheese. This means respecting very demanding rules and strict controls, a long and hard path which must be followed with absolute perseverance if it is undertaken."



#### PALTUFA

Paltufa is a blue-veined, creamy cheese with the addition of summer black truffle which originates from the dairy experience of Palzola, which in many years of history was able to combine the tradition passed down from one generation of dairies to another, with the technological innovation of its modern installation. In this way a product with an exceptional organoleptic complexity is created, where the unique flavour and the intense scent of the truffle, which are reminiscent of hay and chestnut, go well with the creaminess and the delicate marbling of the cheese. Paltufa is available in the sizes whole wheel weighing about 12 Kg, half wheel weighing about 6 Kg, quarter wheel weighing about 3 Kg, one eighth wheel weighing about 1,5 Kg, one sixteenth wheel weighing about 0,8 Kg and portioned in 200-gram tray.



#### PALFUOCO

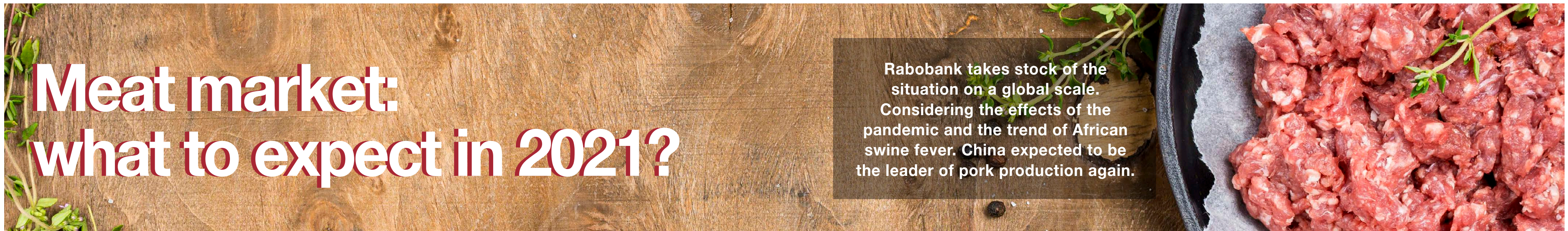
Palfuoco is a blue-veined cheese obtained from Italian pasteurized whole cow's milk. Dried and bruised spicy red pepper is added to the curd and manually blended. So, the result is a creamy, soft product ripened for an average of 80 days, whose sweetness is in pleasant contrast with the spiciness of the red pepper and the sapidity of the Penicillium moulds. Palfuoco is available in the sizes whole wheel weighing about 12,5 Kg, half wheel weighing about 6,5 Kg, quarter wheel weighing about 3,2 Kg, one eighth wheel weighing about 1,5 Kg, one sixteenth wheel weighing about 0,8 Kg and portioned in 200-gram bowls.



#### PALZOLA DOLCE

Palzola's Gorgonzola dolce Sovrano stands out for its creaminess, a feature which preserves for more days. Moreover, its cream pleasantly mingles with a delicate marbling which results well fused into the paste. It is ripened for a period of 60-70 days in Palzola's ancient cheese huts, real aging cellars covered with tiled brick which keep the values of humidity and temperature unaltered.





# Meat market: what to expect in 2021?

Rabobank takes stock of the situation on a global scale. Considering the effects of the pandemic and the trend of African swine fever. China expected to be the leader of pork production again.

2021 will be a challenging year for the meat market because of the effects of the Covid-19 pandemic and the African swine fever (Asf). According to Rabobank, a Dutch multinational banking and financial services company, the year will be marked by certainties and uncertainties, risks and opportunities. While the most feared wild card are the effects of the pandemic, the most reassuring certainty is China's central role as leading pork producer worldwide. Indeed, we must remember that, in the last few years, due to Asf, 20% of Chinese pigs have been culled, that is to say more than 100 million pigs. This heavy loss has caused a strong increase in the cost of the raw material in the world owing to the rise in demand. Today the situation is getting back to normal, and it is expected that in 2021 pork will lead production growth. Another issue highlighted by the Rabobank market analysis is the sustainability of animal protein supply chains. Indeed, firm actions by policymakers are expected in 2021 in order to clear up and regulate this unresolved but key issue. Moreover, technology will turn out to be decisive.

## Rabobank's forecasts

China will be in the spotlight this year, dealing with the consequen-

ces of Asf. According to data, People's Republic of China will lead pork production growth around the world. This record is due to the priority given by China to biosecurity measures. According to Rabobank, Chinese pork production will increase by between 10% and 15%. At the same time, Chinese pork imports will decrease because prices will be relatively still high, and consumption is not expected to return to previous levels. However, China will remain a great importer of pork (45% of global trade in 2020), but also of poultry and beef (10% and 25% respectively). Regarding the other animal proteins, poultry will gain further ground benefiting from the ongoing low pork supply situation due to Asf. Production will increase (at different paces according to the various poultry species) while imports are set to decline. Conversely, beef imports will grow (especially from the Usa) to face a strong demand.

As for Europe, pork exports will decrease because of the drop in global demand, particularly from China. Consequently, production will fall. Also beef production and consumption will be on the decline, mainly due to Covid-19-related restrictions in foodservice.

The case of Germany is isolated.

Indeed, in September 2020, Asf was detected there in the wild boar population and quickly spread. The country, respecting the regionalization policy, can continue to export pork but only within the EU. Negotiations were immediately opened to persuade China - Germany's largest export market outside the EU - to accept the country's regionalization so as to ensure trade from the non-affected regions of Germany can continue.

In North America the report expects a strongest growth for beef meat production. Also exports will increase. It is noteworthy that US pork exports hit record levels in 2020, on the back of Chinese demand.

The Brazilian market will register an increase in exports too, both for pork and for beef, to China and other countries. Instead, the recovery of the meat market in Southeast Asia will be weaker. Pork production will improve in Vietnam (thanks to intensive and large farms), while in the Philippines it will remain constrained and will risk further herd losses. Altogether, in 2021 a growth in pork production is also expected in the region (+8%), as well as in imports (+20%) and consumption (+9%). A weak recovery is also expected for

the production and consumption of poultry and beef.

## The effects of Covid-19

In 2020 the global meat market had to deal with Covid-19, just like human beings did. Each animal protein group has been affected

## Previsioni sul mercato globale della carne nel 2021

Rabobank fa il punto della situazione sul mercato globale delle proteine animali. E avanza previsioni per il 2021, considerando gli effetti della pandemia di Covid-19 e il trend della peste suina africana. La Cina si riconfermerà leader della produzione suinicola. Si prevede inoltre più chiarezza per la normativa in materia di sostenibilità delle catene di approvvigionamento delle carni. Fondamentale il ruolo della tecnologia.



differently even if all of them have suffered the closures imposed on the Horeca channel, the limited mobility and the change in consumers' buying habits. Fortunately, in 2021 a gradual return to normality is expected, even though the meat market will have to cope with increasing costs both for structural

investments and for facing the rigorous measures taken by legislators. New opportunities are in sight, but also risks, considering that the situation is still evolving.

## Sustainability and technology

One of the hot subjects of 2021

will be the sustainability of the animal protein supply chains. The intervention of regulators along with market initiatives will be fundamental considering that, up to now, they haven't given clear guidelines to ensure a completely sustainable approach. This urgent need is due to the high meat consumption and, in order to

maintain these levels, it is necessary to adopt tangible measures to reduce, first of all, greenhouse gas emissions. In this context, technology has proved to be a valuable ally - and will continue to be so. Some examples are methane-reducing feed additives and traceability, useful to mitigate animal disease risks.

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## ZOOM



Source: Rabobank Global Animal Protein Outlook 2021

end



## INITIATIVES

# The 'Made in Italy Pavilion' is born

**Signed agreement between the Chinese e-commerce giant Alibaba and the Italian Trade Agency (ITA) for the creation of the first b2b showcase dedicated to Italian companies.**

An enormous online showcase where Italian companies will have the chance to expose their own products and catalogues, interacting in a direct way, in 19 different languages, with 26 million professional buyers from 190 countries of the world. This is ITA's project in collaboration with Alibaba Group. They have signed an agreement for the creation of the 'Made in Italy Pavilion', a great permanent digital b2b exhibition, inside the Alibaba.com marketplace. A one-of-a-kind project and the first in Europe that the Chinese e-commerce giant launches along with a government partner.

The partnership stems from the will to mark a growth path for Italian business. Volumes generated by b2b trade, also driven by the pandemic, have grown. And it is estimated that, in the next few years, they will continue to increase. Indeed, the Digital b2b Observatory of the Politecnico di Milano, in collaboration with Netcomm, registered a turnover of 410 billion Euros between b2b companies in Italy in 2019, in the face of a global e-commerce value which is esteemed to have reached 12 trillion dollars in 2020 (six times that of the b2c). It is precisely in this important market share that ITA Agency and Alibaba Group have found a potential for the digital growth and the internationalization of Smes. The sign of the Memorandum of Understanding (Mou) took place on 23rd November 2020 during a virtual ceremony in the presence of the Italian minister of Foreign Affairs and International Cooperation, Luigi di Maio, and the undersecretary of State for Foreign Affairs, Manlio Di Stefano, which was followed by a webinar to show the opportunities offered by the platform and the access modes to the companies.

The aim of Alibaba.com is to support the digital transformation of Italian companies bringing many of them on the platform over the next five years (in addition to the hundreds which are already present in key sectors for the economy such as textile and clothing industry, mechanics and components production, agricultural

and food industry, and cosmetics).

"The e-commerce is fundamental for the revival of the made in Italy because it offers a substantial contribution in support of the companies hit by the slowdown of the traditional purchase forms due to Covid-19", Luigi Di Maio said. "The partnership agreement signed between ITA and Alibaba, one of the most representative global platforms, lets Italian companies enter a virtual market of enormous potential - he added - In the next few years, the digital world will be increasingly an engine for export growth, and I expect the Italian companies will be able to fully exploit its potentials, moving in an effective way in an international context which is more and more open and competitive."

### How the platform works

Made in Italy Pavilion will work as a real permanent online fair where Italian exporting companies will be able to expose and interact in a direct way. Initially, the agreement will give 300 companies the chance to activa-

te completely for free, thanks to ITA's contribution, a premium membership on Alibaba.com and to be included within the 'Made in Italy Pavilion' for 24 months. In this way they can benefit from the training programmes and the assistance services dedicated to the management of their own online profile. Specifically, ITA-Alibaba project will enhance the products of each company within the marketplace, with a personalized account-showcase giving the opportunity to include product sheets complete with technical information, photos, certifications, and any other document which is important to define the offer. It will be possible to have a direct contact channel with the global buyers, receiving requests and sending offers within the platform, facilitated by the simultaneous translation software too. Moreover, to maximize the visibility and generate global traffic towards the stores of the companies which are present in this virtual hub, ITA and Alibaba have joined their respective abilities to design and implement targeted smart marketing and keyword advertising campaigns,

in addition to personalized solutions to help companies reach their goals. So, these wide highly structured communication campaigns will enable companies to gain maximum visibility. Furthermore, the access to an assistance service dedicated to the construction of company profiles and product sheets will be available through webinar.

### The partnership in favour of Smes

The launch of 'Made in Italy Pavilion' with Alibaba.com continues and expands the already existing collaboration between Alibaba Group and ITA, which saw in 2018 the opening of 'helloITA', Alibaba Tmall b2c platform's dedicated section, through which more than a hundred virtual shops of brands and Italian companies directly reach about 800 million Chinese consumers. The cooperation will continue with Freshippo as well, Alibaba's chain of digital and automated supermarkets in China, where there is already a wide range of Italian products, especially in the agrifood sector. Carlo Ferro, president of the ITA Agency, declared: "Consumption habits are more and more oriented towards the digital world and the pandemic is accelerating this transition. As ITA we are very active in this regard, and, in accordance with the Export Agreement wanted by Minister Di Maio, we have redesigned the programmes of our initiatives on digital basis." Rodrigo Cipriani Foresio, general manager South Europe at Alibaba Group, commented: "The renewal of our collaboration with ITA happens, not by chance, in a particularly delicate phase for the Italian economy, which has made essential for companies to rethink their strategy and operations on digital basis."

### ALIBABA.COM: THE BIGGEST B2B MARKETPLACE IN THE WORLD



Source: Italian Trade Agency - Italian Ministry of Foreign Affairs and International Cooperation

### Nasce 'Made in Italy Pavilion' dall'accordo tra Alibaba Group e Agenzia Ice

È la prima vetrina online b2b permanente, all'interno del marketplace Alibaba.com, dove le aziende italiane possono esporre i propri prodotti e i cataloghi, interagendo in maniera diretta, in 19 lingue diverse, con 26 milioni di buyer professionali provenienti da 190 Paesi del mondo. Si tratta di un progetto unico nel suo genere e il primo in Europa che il colosso dell'e-commerce cinese lancia insieme a un partner governativo. L'obiettivo è segnare un percorso di crescita per il business italiano e favorire l'internazionalizzazione delle Pmi, sfruttando le potenzialità del digitale.



## TRENDING

# 'Snackification' mania

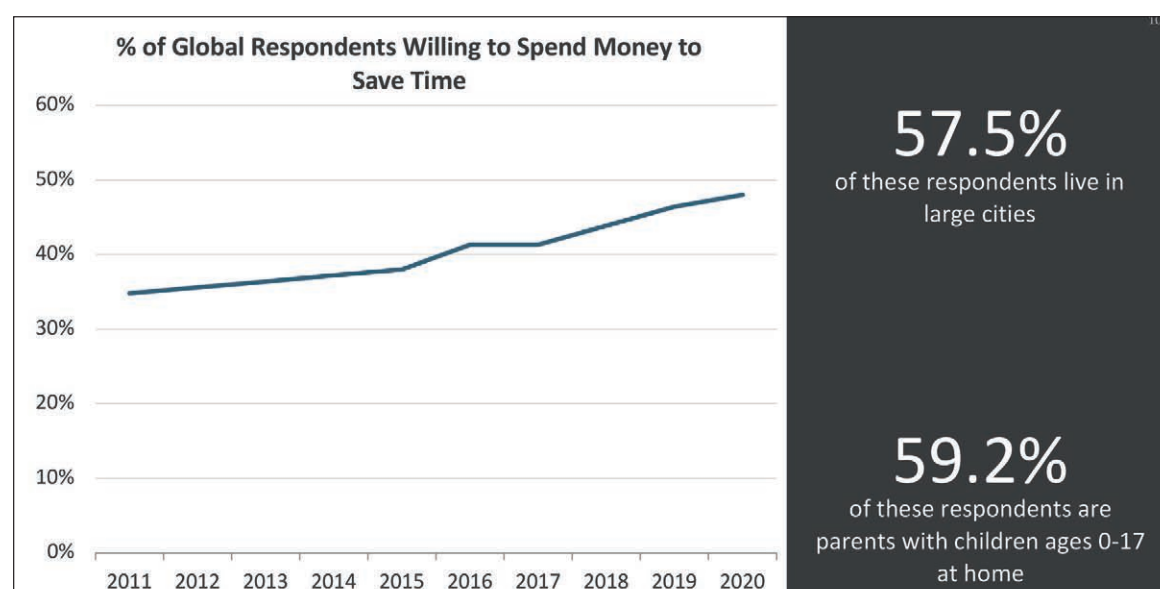
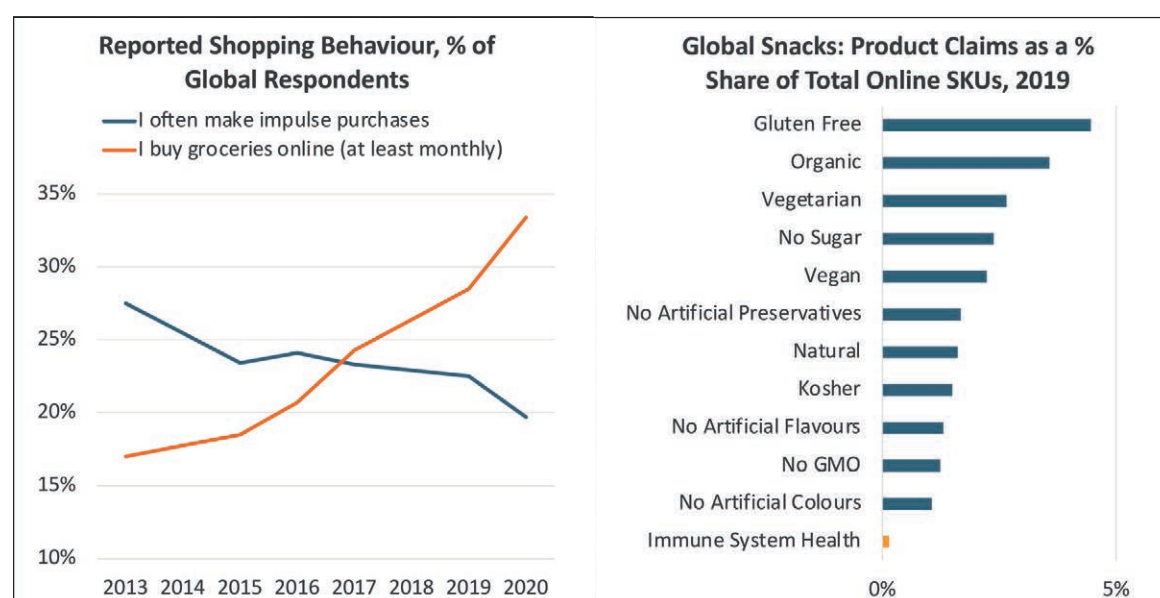
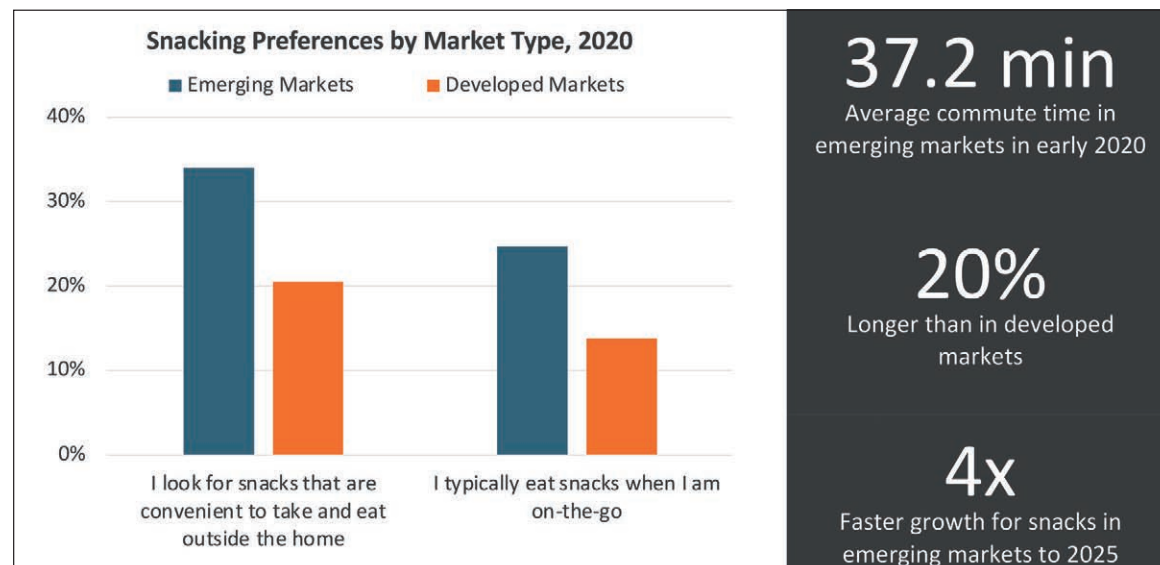
Innovative, single-dose, with recyclable packaging. The global snack market is rapidly increasing. The main trends in a report by Euromonitor International.

A new eating model, which reconciles the daily routine with a flexible diet, based on quick snacks that replace the 'traditional' meal. It is the 'snackification' phenomenon, composed of small pre-packaged (or home-made) portions and snacks. A trend which has been rapidly spreading for some time now. And which has been further amplified by the effects of the pandemic. As highlighted by a report issued by the research company Euromonitor International and presented in a webinar titled 'Where Do We Go from Here? The Future of Snackification Beyond 2020'.

### New eating habits

Professionals and families' modern lifestyle, with the steady necessity of optimizing time during the day, has led to rethink even the one spent on eating, transforming the meal into a quick, practical and nourishing snack, both

sweet and salty. Although it could be deceiving, the term 'snackification' does not refer to candies, chocolate and crisps. Quite the opposite: it is used to indicate many small healthy meals, distributed over the day, such as organic products, biscuits and protein bars. And while during the quarantine snack purchases plummeted because consumers devoted themselves to home cooking, now they are recovering. Even in smart working, for convenience, this trend is clear. "I prefer to spend my time doing things other than cooking," have declared some of the respondents (Generation Z), followed by American, European, Australian and New Zealand Millennials. "Even before the pandemic, with the rapid process of global urbanisation which affected 56% of the population and with the increased use of technology, the snackification with snacks that are just a click away was



Source: Euromonitor International

### Fenomeno 'snackification'

Un nuovo modello alimentare, che concilia la routine quotidiana con un'alimentazione flessibile, a base di spuntini veloci che vanno a sostituire il pasto 'tradizionale'. È il fenomeno 'snackification', fatto di piccole porzioni pre-confezionate (o home-made) e di spezza fame. Un trend in rapida espansione già da qualche tempo. E ulteriormente amplificato dagli effetti della pandemia. Come evidenzia un rapporto pubblicato dalla società di ricerche Euromonitor International e presentato nel corso del webinar intitolato 'Where Do We Go from Here? The Future of Snackification Beyond 2020'.

a reality," explains Jared Koerten, author of Euromonitor's research. "87% of us have got a smartphone, and from 2014 to 2019 online sales increased by 160%." The key to success of the 'pocket' lunch is certainly the immediacy of consumption, the completeness of the nutritional values, and the respect of an increasing search for wellbeing associated with nutrition.

### The sales trend in modern distribution

In 2020, snack sales increased by 2.8% at supermarkets and hypermarkets and even by 39.7% in the e-commerce channel. Specifically, consumers are looking for snacks which contain substances able to strengthen the immune system, which are healthy, gluten free, organic, vegan, vegetarian, sugar free, and without artificial preservatives and colouring. Maybe kosher and without chemical flavours and GMOs as well. And with an excellent

value for money. Generally, an increasing interest in 'clean' food (clean label) with few and clear ingredients is evident. In this regard, an increase has been particularly recorded in the segment of organic snacks, a market which will reach 23.7 billion dollars by 2025, with an increase of 14%.

### The identikit of the snacks of the future

According to the research, the growth of the snack sector will be mainly led by the emerging markets, where sales will rise by 14% by 2025. Both the rate of innovation and the characteristics of the packaging will be decisive for the success of a product. Consumers ask for recyclable, biodegradable, and resealable packs which allow to see the product inside. Above all, they look for small or single-dose packages to always bring along. A rather profitable format for the snack producers themselves.

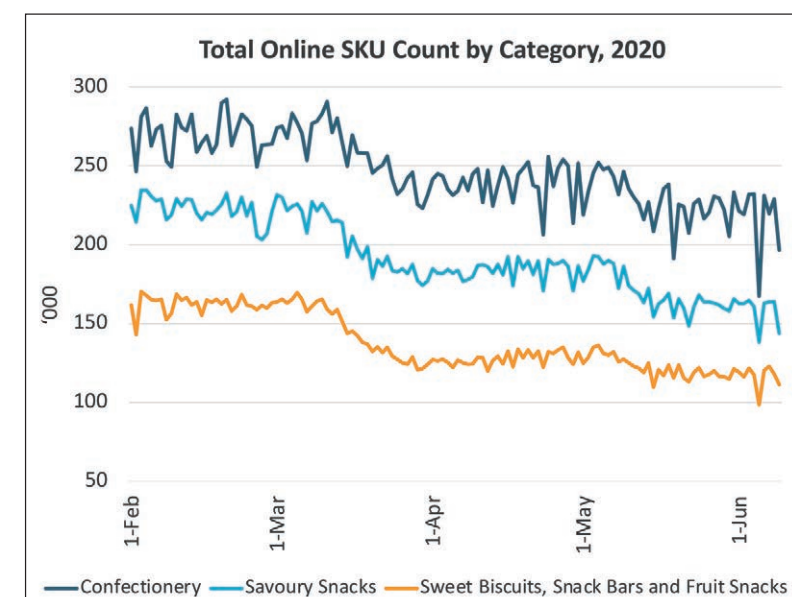
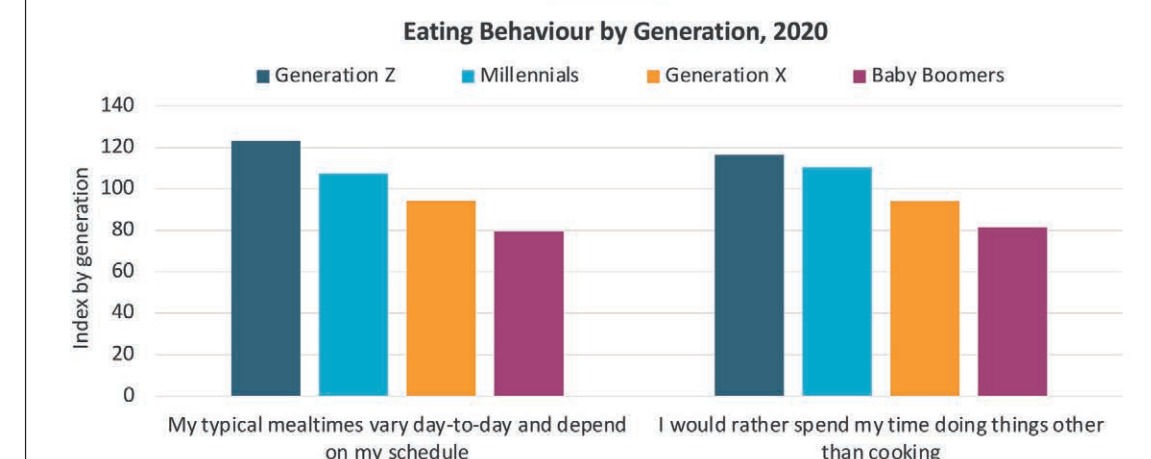
### THE PANDEMIC DRIVES CHANNEL SHIFTS

**-4.3%**  
GLOBAL GROWTH OF SNACK SALES AT FORECOURT RETAILERS IN 2020

**+2.8%**  
GLOBAL GROWTH OF SNACK SALES AT SUPERMARKETS AND HYPERMARKETS IN 2020

**+39.7%**  
GLOBAL GROWTH OF SNACK SALES THROUGH E-COMMERCE IN 2020

### Generational shifts in eating habits



Source: Euromonitor International

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# PRODUCT SHOWCASE

## WHAT A SWEET (AND SAVOURY) BUSINESS

Chocolate bars and pralines, candies and biscuits, as well as breadsticks, taralli, ice creams and cakes. The Italian confectionery and bakery industries kick off 2021 with a host of new and innovative products, featuring more performing packs and original tastes. In the following pages, a selection of the most interesting product launches.

### Un business dolce (un po' salato)

Cioccolato e cioccolatini, caramelle e biscotti, ma anche grissini e taralli, gelati e merendine. L'industria dolciaria e degli snack apre il 2021 con un ventaglio di prodotti nuovi e accattivanti. Caratterizzati da pack più performanti e gusti originali. In queste pagine, le migliori proposte per i mercati esteri.

FROM PAGE 16  
TO PAGE 22

## BISCUITS

**AMARETTI VIRGINIA**  
[www.amarettivirginia.com](http://www.amarettivirginia.com)

### Fruttini Orange and Lemon



Fine biscuits with orange or lemon paste and dark chocolate.

#### Ingredients

Fine biscuits with lemon paste and dark chocolate: wheat flour, butter, sugar, dark chocolate 13% (sugar, cocoa mass, cocoa butter, emulsifier: soya lecithin, natural vanilla flavouring), almond, candied lemon paste 6% (lemon peels 49%, glucose-fructose syrup, sugar, acidity regulator: citric acid, preservative: sulphur dioxide), whole eggs, raising agents: sodium pyrophosphate, sodium bicarbonate, wheat starch, natural flavouring, salt. It may contain traces of other tree nuts.

#### Packaging details

Bag net weight: 180 g; 8 units per carton, assorted flavor (4 orange + 4 lemon)

#### Shelf life

11 months

**A.D.R.**  
[www.sassellese.it](http://www.sassellese.it)

### Baci of Sassello white with butter



Baci of Sassello with white butter are a baked confectionery product.

#### Ingredients

Wheat flour, sugar, toasted Piedmont Hazelnut 18%, butter 17%, chocolate 10% (cocoa mass, sugar, cocoa butter, emulsifier: soya lecithin).

#### Packaging details

160 g / 5.65 oz bag

#### Shelf life

10 months

#### International certifications

Ifs, Brc, Rspo, ISO 9001:2015, ISO 14001:2015. Just for chocolate: Utz certified

**FARMO**  
[www.farmo.com](http://www.farmo.com)

### Mini Cookies



A combination of gluten-free goodness. Ideal for breakfast, great as a snack.

#### Ingredients

Dark chocolate chips, wholemeal oat flour, rice flour with brown sugar and sunflower oil.

#### Packaging details

150 g

#### Shelf life

12 months

#### International certifications

GF certified

**VICENZI**  
[www.matildevicenzi.com](http://www.matildevicenzi.com)

### Grisbi Vanilla Bourbon



Gourmet filled cookies with precious Vanilla Bourbon from Madagascar.

#### Ingredients

Sugar, wheat flour, vegetable oils (palm oil, sunflower oil), whole milk powder, cocoa 3.2%, glucose syrup, barn eggs, dark chocolate 2.0% (sugar, cocoa paste, cocoa butter, emulsifier: sunflower lecithin, vanilla natural flavouring), corn starch, wheat starch, eggs yolk powder, emulsifier: sunflower lecithin, salt, raising agents: sodium hydrogen carbonate and ammonium hydrogen carbonate, flavourings, vanilla bourbon natural flavour.

#### Packaging details

150 g, cardboard case

#### Shelf life

12 months

#### International certifications

Dnv-Gl, Brc, Isf, Kosher, Halal

**GHIOTT FIRENZE**  
[www.ghiott.it](http://www.ghiott.it)

### Ghiottini with 100% Italian almonds



Ghiottini are Ghiott's flagship product since 1953, the year in which their recipe was born. Still today they are produced with fresh, simple, quality ingredients, such as fresh milk, barn eggs, honey, butter, natural aromas and whole and selected 100% Italian almonds.

#### Ingredients

100% Italian almonds, barn eggs, natural aromas, fresh milk, butter, honey

#### Packaging details

200 g bag, 250 g box, 400 g box, 500 g bag, 800 g bag, 1000 g bag, 2000 bulk, individually-wrapped 150 pcs box.

#### Shelf life

15 months

#### International certifications

Brc, Ifs

**I MASINI**  
[www.tipicodisardegna.com](http://www.tipicodisardegna.com)

### Savoirdone di Sardegna



Savoirdone is a classic of the Italian pastry tradition that the company has been producing in Sardinia with genuineness and passion for three generations. These biscuit are ideal for breakfast and as a snack, and perfect for making tiramisù. Today in the new and elegant 230 g pack.

#### Ingredients

Free-range eggs (50%), sugar, wheat flour.

#### Packaging details

230 g

#### Shelf life

150 days

#### International certifications

Ifs Food, Fda, Halal.

**GRUPPO GERMINAL**  
[www.germinalbio.it/en](http://www.germinalbio.it/en)

### BioJunior biscuits and bar



BioJunior is a complete line of organic products formulated to meet the nutritional needs of the early childhood. Plain biscuits (7 months+) and apple biscuits (10 months+) are eggs free, with no added salt and fortified with Vitamin B1. Blueberry bar (10 months+) is dairy free, eggs free, with no added salt, sweetened with apple juice and fortified with Vitamin B1. The BioJunior Line also includes organic pasta.

#### Packaging details

Biscuits: 100 g, Organic Blueberry Bar: 132 g. Primary packaging: polypropylene film; secondary packaging: printed cardboard box.

#### International certifications

Organic, vegan, eggs free, dairy free (depends on the product)

**PANEALBA**  
[www.campiellobiscotti.it](http://www.campiellobiscotti.it)

### Frollino del Buongiorno with fresh milk cream



Shortbreads with fresh milk cream.

#### Ingredients

Fresh milk cream

#### Packaging details

350 g/12 pcs

#### Shelf life

12 months

#### International certifications

Ifs

## SPREADABLES

**ADI APICOLTURA**  
[www.adiapicoltura.it](http://www.adiapicoltura.it)

### 70.30 Organic honey and hazelnut cream



Born from the evolution of Cremiel, a spreadable cream based on honey and hazelnut paste from Piedmont. 70.30 refines the proportion of ingredients which are now 70% Italian organic acacia honey and 30% organic Piedmont hazelnut Paste PGI. A cream totally certified organic and in the name of health: only two natural ingredients, healthy and of certain origin. Suitable also for children, thanks to the absence of any sugar or added ingredient.

#### Ingredients

70% Italian organic acacia honey and 30% organic Piedmont hazelnut paste PGI

#### Packaging details

250 g, glass jar

#### Shelf life

3 years

#### International certifications

Organic

**FIOR DI LOTO**  
[www.fiordiloto.it](http://www.fiordiloto.it)

### Spreadable cream with coconut milk and toasted hazelnuts



A delicious gluten-free and lactose-free spread made with coconut milk and toasted hazelnuts.

#### Ingredients

Brown sugar, 17% coconut milk powder, 15% toasted hazelnuts, 12% cocoa powder, sunflower oil, 5.2% cocoa butter.

#### Packaging details

200 g

#### International certifications

Organic

**BARILLA GROUP**  
[www.pandistelle.it](http://www.pandistelle.it)

### Pan di Stelle Cream



A magical union between a sweet cocoa cream with 100% Italian hazelnuts and the Pan di Stelle biscuit. Palm oil free.

#### Ingredients

Spreadable cream with 100% Italian hazelnuts and chopped Pan di Stelle biscuits

#### Packaging details

190 g reusable glass; from January in limited edition with dedicated graphics.

#### Shelf life

365 days

**FIorentini ALIMENTARI**  
[www.fiorentinalimentari.it](http://www.fiorentinalimentari.it)

### Peanut Butter Crunchy



Peanut butter, without palm oil and hydrogenated fats, is source of protein and without added sugar. Fiorentini's peanut butter is a spreadable cream, enriched with many pieces of roasted peanuts: it is ideal for sweet nibbles and desserts.

#### Ingredients

93% roasted peanuts, sunflower oil, salt.

#### Packaging details

350 g jar

#### Shelf life

12 months

**D'ALESSANDRO CONFETTURE**  
[www.dalessandroconfetture.it](http://www.dalessandroconfetture.it)

### Scrucchijate di Uva



The Scrucchijate di Uva is part of the Extra Jams line and has a high percentage of high quality fresh fruit, over 80% of the finished product. This is the reason for its intense aroma and round taste. It is prepared with Montepulciano d'Abruzzo grapes, harvested at the right degree of ripeness. No dyes or preservatives are added.

#### Ingredients

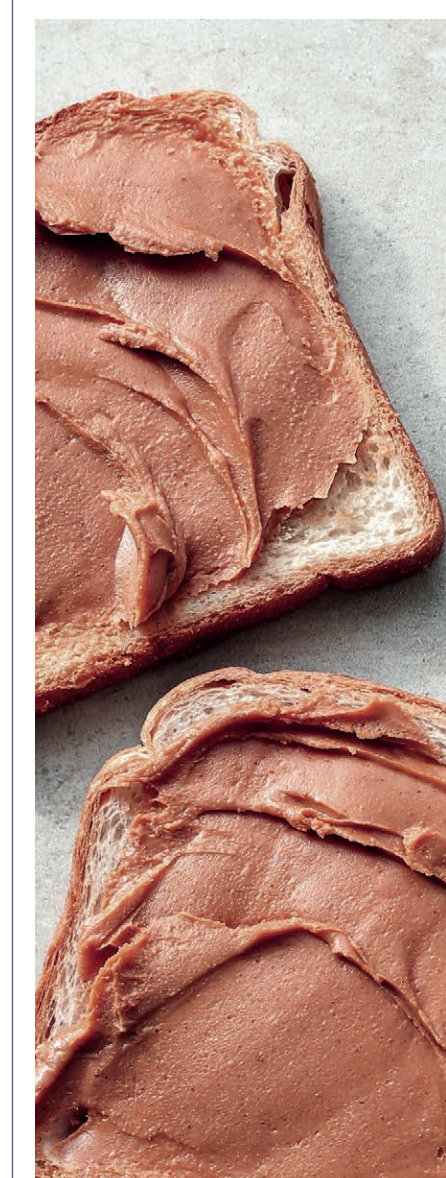
Montepulciano d'Abruzzo grapes, raw cane sugar, pectin.

#### Packaging details

360 g or 45 g glass jar

#### Shelf life

3 years





## PRODUCT SHOWCASE

### SPREADABLES

#### MASTER CHEF www.masterchefsrl.com

##### Cream Spreads



Master Chef's selection of cream spreads includes Pistachio cream spread, Pomegranate cream spread, and Hazelnut cream spread. All of them are delicious and soft and made from the finest Sicilian ingredients in keeping with the authentic taste of tradition.

##### Ingredients

By way of example - Pomegranate cream spread: Sugar, vegetable oils and fats (sunflower oils), fats (coconut and cocoa), pomegranate, red fruits 15%, skimmed milk powder, whey powder, Emulsifier (E322 sunflower lecithin), flavorings (vanillin)

##### Packaging details

Available in elegant 170 g/6 oz packs in both The Black Diamond line (super premium selection) and in The Colours of Sicily line, intended for retail channels.

##### Shelf life

12 months

##### International certifications

Eccellenze Italiane

#### SOCADO www.socado.com

##### Come Mi Vuoi



From Socado's passion and experience comes 'Come Mi Vuoi', the spreadable cream with no added sugars, made with 100% fine Italian hazelnuts. The cream's delicate sweetness enhances the deliciousness of the hazelnuts and cocoa together with an high fiber content. The name, 'Come Mi Vuoi' (literally 'How you want me') celebrates the connection between the product and the consumer.

##### Packaging details

330 g

##### Shelf life

15 months

##### International certifications

Product certification Utz

#### NUTKAO www.nutkao.com

##### Milk Free Spread



Based on chocolate and hazelnut spread, it is aimed at anyone who suffers from lactose allergies, is lactose-intolerant or simply looks for a lighter spread. Produced on a dedicated line and developed to enhance the taste and make it pleasant to the palate, whilst maintaining the unmistakable taste of the traditional Nutkao spread. Suitable also for the ones who choose to follow a vegan diet.

##### Ingredients

Cocoa, hazelnuts

##### Packaging details

350 g jar / 10 units tray

##### Shelf life

18 months

##### International certifications

Rspo, Kosher

#### TERRA E ORO www.terraeoro.com

##### Miele L'apicoltore



This honey range includes Miele d'Italia, Miele delle Alpi d'Italia, Miele del Piemonte; Miele degli Appennini; Miele della Puglia.

##### Packaging details

375 g glass jar

##### Shelf life

24 months

##### International certifications

Organic, Halal, Ifs, Kashar

### CHOCOLATE & SUGAR CONFECTIONERY

#### ANTICA TORRONERIA PIEMONTESE www.torrone.it

##### Caramel and salty hazelnuts sweet truffles



To these classic sweet truffles, the right quantity of salt has been added to the best hazelnuts mixing them to a glutinous caramel chocolate. A fantastic contrast in taste.

##### Ingredients

White, salty caramel chocolate, hazelnuts and salt.

##### Packaging details

200g bag, 140g box and bulk of 3kg

##### Shelf life

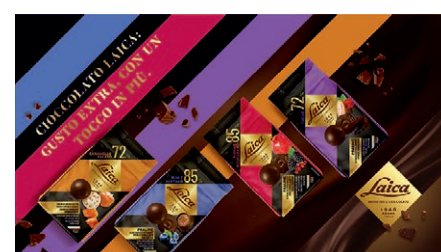
12 months

##### International certifications

Ifs, Brc

#### LAICA www.laica.eu

##### The Extra Dark



Covered with extra dark chocolate, Laica Dark pralines satisfy even the most demanding palates. Each one hides a soft cream that enhances the taste of its filling: fruity, with a pleasant alcoholic note and sweet, with a touch of salty. The richness of flavors plays with the different intensity percentages (72% and 85%), granting small moments of passion.

##### Ingredients

Extra dark chocolate 72% and 85% with assorted creams fillings

##### Packaging details

Bag 100 g, expo x 14 pcs

##### Shelf life

18 months

##### International certifications

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

#### LAGO GROUP www.lagogroup.it

##### Sugar-free wafer, cocoa and hazelnut



Sugar-free wafers in single portions of 45 g, providing the consumers target with a measured dose of product, also making easy the out of home consumption.

##### Ingredients

Sweetener: maltitol, wheat flour, coconut oil, fat-reduced cocoa powder, hazelnut paste (6% in the cream), emulsifier: soy lecithins, salt, raising agent: sodium hydrogen carbonate, vanilla extract.

##### Packaging details

180 g, carton box (4 pcs x 45 g)

##### Shelf life

18 months

##### International certifications

Halal, Kosher

#### IN.CAP. www.incap.it

##### 'Cesare Carraro' gift boxes



Refined gift boxes filled with hard boiled fruit flavoured candies or jellies, available in different materials (wood or metal), colours (metal: white, red, gold, silver) and sizes. No further printing costs are required. Minimum quantities needed are very low.

##### Ingredients

Candies: sugar, glucose syrup, flavorings. Jellies: sugar, glucose syrup, concentrated fruit juice and pulp.

##### Packaging details

Wooden boxes filled with: hard boiled candies 300 g (square) or 400 g (rectangular); jellies 250 g (square) or 350 g (rectangular). Metal boxes filled with hard boiled candies 150 g (small, rectangular), 300 g (medium, rectangular) or 400 g (square); wooden boxes filled with jellies 125 g (small, rectangular), 250 g (medium, rectangular) or 350 g (square)

##### Shelf life

36 months

##### International certifications

Haccp

#### BAULE VOLANTE www.baulevolante.it

##### Linea Cioccolato Monorigine



Linea Cioccolato Monorigine (Single-origin cocoa line) includes three types of milk-free and gluten-free extra dark chocolate. 85% extra dark chocolate from Togo, 70% extra dark chocolate from Peru and 75% extra dark chocolate from Ecuador.

##### Ingredients

Cocoa mass, coconut blossom sugar, cocoa butter, vanilla extract.

##### Packaging details

60 g

##### International certifications

Organic

#### BULGARI AGOSTINO www.bulgariagostino.it

##### Extruded marshmallow with fruit juice



Extruded marshmallow in white-pink twist shape, white-yellow lemon tube and orange-white striped marshmallow.

##### Ingredients

Glucose-fructose syrup, sugar, water, gelling agent: food gelatine, maize starch, fruit juice (2%), flavours and colours.

##### Packaging details

150 g x 12 bags and 1 kg x 6 bags

##### Shelf life

12 months

#### DI COSTA www.dicosta.it

##### Colomba with pistachio cream



Oven natural leavening product

##### Ingredients

Wheat flour, pistachio cream, sugar, butter, milk, eggs, natural yeast, egg white, salt, natural flavorings.

##### Packaging details

750 g

##### Shelf life

9 months

##### International certifications

Ifs, Brc

#### VENCHI www.venchi.com

##### Mediterraneo Egg



White chocolate combined with pistachio paste, lemon zest and crunchy pistachio grains.

##### Ingredients

White chocolate, pistachio, lemon

##### Packaging details

250 g, tin box

##### Shelf life

1 year

follow

**BULGARI** ITALIA

We are getting **BIGGER**

marshmallow factory

new mallow line

Prodotto ITALIANO

BULGARI AGOSTINO | info@bulgariagostino.it | +39 030 99 59 553

www.bulgariagostino.it



# PRODUCT SHOWCASE

## CHOCOLATE & SUGAR CONFECTIONERY

### FRACCARO SPUMADORO www.pasticceriafraccaro.it

#### Focaccia Green Wrapped Line



Soft dough and fine butter in a delicate dessert original from Veneto, perfumed and sweetened by the delicate icing with grains of sugar. This year, Focaccia Verde Green Wrapped Line celebrates its 60th anniversary.

##### Ingredients

Wheat flour, sugar, butter, eggs, icing (sugar, albumen, coconut oil, almonds flour, wheat starch, rice flour, peanuts flour, potato flour, flavourings, preservative: calcium propionate), egg yolk, invert sugar syrup, emulsifiers: mono and diglycerides of fatty acids, natural yeast, salt, wheat malt, flavourings. May contain traces of soy.

##### Packaging detail

Weight: 750 and 600 g. Pack type: green wrapped line.

##### Shelf life

6 months

##### International certifications

IFS Food certified

### ICAM CIOCCOLATO www.icamcioccolato.com www.vaniniicioccolato.com

#### Vanini Blue Rose



30 years after its first launch, Icam relaunches Blue Rose, the iconic praline which in the 90's was immediately appreciated for its simple and unmistakable taste. And that now enters the big Vanini family. A tasty praline wrapped in fine milk chocolate and filled with toasted hazelnut cream and crunchy gluten-free cereals. Sold in an elegant and refined pack. The product is gluten free and GMOs free.

##### Ingredients

Fine milk chocolate, roasted hazelnut cream and crunchy gluten-free cereals

##### Packaging details

Gift box (255 g) and bag (120 g)

##### Shelf life

16 months

### LA PERLA DI TORINO www.laperladitorino.it/en

#### Tiramisu Chocolate Easter Egg



The new Tiramisu chocolate Easter egg by La Perla di Torino is born from the award-winning Tiramisu Truffle recipe and the success of the Tiramisu spread. Milk and dark chocolate, together with mascarpone and coffee powder, for a chocolate egg that recalls the unmistakable taste of the most beloved Italian dessert in the world: Tiramisu. The outer coating is made of layers of different colors and flavors just like the classic dessert prepared with biscuits, mascarpone, coffee, and cocoa.

##### Packaging details

200 g

##### Shelf life

10-12 months

##### International certifications

Brc

### DOLCIARIA ACQUAVIVA www.dolciariaacquaviva.com

#### Caruso with Sicilian lemon cream



Traditional curved shape croissant, made with margarine and natural yeast, 100% Italian flour, filled with delicious cream with Sicilian lemons.

##### Ingredients

Margarine, natural yeast, 100% Italian flour

##### Packaging details

Weight: 105 g

##### Shelf life

8 months

##### International certifications

Ils, Brc, Utz, Rspo Segregated

### WITOR'S www.witors.it

#### Il Boero Classic Cherry



The first and inimitable Boero, fruit of Witor's creativity in the art of chocolate since the late 50's. Still surprising today with its strong and enveloping flavour. Alongside continuous research to improve the product and its ingredients, the classic recipe remains the same: extra dark chocolate praline, with a minimum of 45% cocoa, envelops a whole pitted cherry drenched in liqueur.

##### Ingredients

Dark chocolate pralines with cherry and liqueur.

##### Packaging details

Bag of 250 g

##### Shelf life

16 months

##### International certifications

RA Cocoa Certified

### VANNUCCI www.vannuccichocolates.com

#### Dolci Emozioni



Elegant heart shaped packaging containing 100 g of assorted heart shaped chocolates. Red hearts are of finest milk and golden ones 73% extra dark chocolate.

##### Ingredients

Assorted pralines with extra dark (cocoa 73% min.) and finest milk chocolate (cocoa: 32% min., milk: 29,5%). Ingredients: sugar, cocoa mass, fat-reduced cocoa powder, cocoa butter, whole milk powder, emulsifier: soy lecithin, natural vanilla powder. May contain hazelnuts.

##### Packaging details

Weight of chocolates: approx. 8 g each. 12 confections of 100 g

##### Shelf life

15 months

## ICE CREAMS & FROZEN DESSERTS

### TONITTO 1939 www.tonitto.com

#### Origini



Origini is the premium ice cream line for the refined and ethical consumer. It is prepared with exclusive ingredients (single origin) and with cocoa and sugar from Altromercato, the main fair trade reality in Italy. Gourmand recipes especially designed to enhance the combination of fine ingredients such as pink salt from Hymalaia, chocolate cru from Togo or cashews from Vietnam. The products in the Origini line do not contain preservatives and GMOs. They are available in the following variants: chocolate with cashews; lemon, ginger and chocolate; and caramel with pink salt.

##### Ingredients

Fresh milk, Altromercato brown sugar, Altromercato chocolate, pink salt from Himalaya.

##### Packaging details

500 ml / 300 g carton cup

##### Shelf life

3 years

##### International certifications

Brc, Ifs, Utz, Fda

### ITALGELATO www.italgelato.it

#### Choco Crock



Gelato covered by a delicious crunchy chocolate top. To be broken in order to dig into the gelato to enhance the ideal mix of crunchy and creamy. Available in two versions: Egg cream gelato with Modica PGI chocolate, wild strawberries & crunchy chocolate covering; and Egg cream gelato, amaretto cookies, candied orange & crunchy chocolate covering.

##### Packaging details

350 g

##### Shelf life

24 months

### G7 www.g7gelati.it

#### G7 Le Torte – Italian Gelato cake 'Cassata'



G7's velvety and creamy Gelato, decorated with the best ingredients, is now presented on a soft sponge cake slice. 'Cassata', inspired by the traditional Sicilian dessert, is prepared with ricotta cheese gelato and pistachio spreadable cream. The cake is decorated by hand with candied fruit and whole toasted pistachios.

##### Ingredients

Ricotta cheese gelato cake, stuffed with pistachio spreadable cream (20%) and decorated with whole toasted pistachios and fruit salad (5%). On the base, a sponge cake slice dunked with maraschino syrup.

##### Packaging details

1,1 kg (12 servings). Recyclable cardboard box; recyclable plastic tray

##### Shelf life

24 months

##### International certifications

Company certifications: FSSC- ISO 22000, IFS HL

### NEW COLD www.coldgelati.com

#### Tartufo Limoncello



Lemon and limoncello ice cream whit crushed yellow meringue.

##### Ingredients

Rehydrated skimmed milk, sugar, glucose powder, refined coconut oil, yellow crushed meringue 3% (sugar, egg white, coloring: natural extract of safflower), lemon juice 2%, maltodextrin, limoncello liquor 1%, emulsifier (mono and diglycerides of fatty acids), thickeners (carob seed flour, sodium alginate), citric acid, flavourings, color: curcumin.

##### Packaging details

Pack of 2, 90 g each

##### Shelf life

24 months at -18°C

##### International certifications

Brc, Ifs

### CASA DEL GELATO www.casagelato.it

#### Back to Origins



'Ritorno alle Origini' (Back to Origins) is the ice cream as good as it used to be. A genuine, artisanal product, prepared with a few simple raw materials. The result is the true and decisive flavor of highest quality and carefully selected ingredients of which it is made of.

##### Ingredients

Fresh cream and fresh egg yolk

##### Packaging details

Black plastic jar with screw-on lid 400 g. 8 CU per SKU (single flavor)

##### Shelf life:

24 months

##### International certifications:

Brc, Ifs, Organic, Vegan V-Label, RSPQ, Rainforest Alliance.

### CALLIPO GELATERIA www.gelateriacallipo.com

#### Vegan ice cream - Hazelnut



##### Ingredients

Water, Italian hazelnut paste (11%), sugar, glucose syrup, maize dextrose, coconut oil, maize maltodextrin, soya proteins, emulsifiers: mono- and diglycerides of fatty acids; stabilisers: locust bean gum, sodium alginate, guar gum, carrageenan; natural flavouring, salt.

##### Packaging details

310 g tub with cover of CA and tamper-evident

##### Shelf life

36 months

## SAVOURY SNACKS

### GRISSIN BON www.grissinbon.it

#### Minifagolosi Pizza



Mini Fagolosi salted breadsticks, pizza taste.

##### Ingredients

Wheat flour, extra virgin olive oil, tomato powder, yeast, iodized salt (salt, potassium iodate 0.007%), barley malt extract, paprika powder, oregano, basil, dehydrated onion, malted wheat flour, natural flavourings.

##### Packaging details

11 portions x 15 g, 165 g packet

##### Shelf life

210 days

##### International certifications

Ils, Brc, Organic

### IL FORNAIO DEL CASALE www.gecchele.com

#### Happy Cracker



Crunchy baked snacks, without palm oil.

##### Ingredients

Wheat flour, potato flakes, sunflower seeds oil.

##### Packaging details

100 g/ 12 pieces per carton

##### Shelf life

240 days





## PRODUCT SHOWCASE

### SAVOURY SNACKS

**LANDOLFI**  
[www.landolfi1997.it](http://www.landolfi1997.it)

#### Pepitos



Snacks bites whit tomato and oregano and ham aroma.

##### Ingredients

Wheat flour, natural aromatic preparation.

##### Packaging details

35 g single portion boxes composed of 40 pieces

##### Shelf life

8 months

##### International certifications

Brc, Ifs, Iso 22000

**PEDON**  
[www.pedon.it/en](http://www.pedon.it/en)

#### Pulse Snacks



The range includes 24 new pulse snacks, air-roasted and never fried, rich in fibre and plant-based protein. Through a unique air-roasting process pulses are turned into a crunchy and delicious snack, preserving their natural shape and nutritional properties. 3 types to satisfy all wishes: Natural, for a simple and light break; Functional, combined with super ingredients to satisfy specific dietary needs; Yummy, for a surprising taste. Pulse Snacks are 100% natural, gluten-free, with less than 100 Kcal per serving.

##### Ingredients

Pulses are the base ingredient. Some of them contains seeds, fruits, vegetables or spices.

##### Packaging details

100% recyclable pack. Single-serve and on-the-go convenient pouch.

##### Shelf life

12 months

**PUGLIA SAPORI**  
[www.pugliasapori.com](http://www.pugliasapori.com)

#### Buonsani



The tarallini of the new Buonsani line have been developed to meet the needs of those looking for healthy and sustainable food alternatives. The line consists of tarallini with oat beta-glucans, which help to restore the correct levels of cholesterol in the blood, and tarallini with -50% salt, particularly suitable for a low-sodium diet.

##### Ingredients

Buonsani with -50% salt: tender wheat flour, white wine, extra virgin olive oil, salt. Buonsani with oat beta-glucans: tender wheat flour, oat flour, oat flakes, oat fiber, extra virgin olive oil, salt.

##### Packaging details

250 g cardboard box with plastic bag inside

##### Shelf life

12 months

##### International certifications

Bioagricert, Ifs, Brc.

**ROBERTO INDUSTRIA ALIMENTARE**  
[www.robertoalimentare.com](http://www.robertoalimentare.com)

#### Bruschettine



Sliced toasted bread with tomato and basil. Perfect as a tasty snack or an aperitif, as well as combined with fresh ingredients, creams, cheese and cold cuts. Small, crunchy and full of taste.

##### Ingredients

Wheat flour, olive oil, iodized salt (salt, potassium iodate), dehydrated tomato powder 1.9%, natural flavouring, dried basil 1.0%, extra virgin olive oil, yeast, wheat gluten, malted wheat flour, roasted barley malt.

##### Packaging details

Weight: 100 g; pack type: plastic film in compliance with food contact.

##### Shelf life

365 days

##### International certifications

Ifs, Brc

**TARTUFLANGHE**  
[www.tartuflanghe.com](http://www.tartuflanghe.com)

#### Hazelnuts covered with salted truffle juice



Authentic Piedmont Hazelnut PGI, toasted and salted, covered with a thin layer of truffle juice. The same range also includes Corn and Cashews.

##### Ingredients

Piedmont Hazelnut PGI, truffle juice.

##### Packaging details

50 g, packaged in a protective atmosphere.

##### Shelf life

9 months

##### International certifications

Brc, Ifs, Icea

**TENTAZIONI PUGLIESI**  
[www.tentazionipugliesi.it](http://www.tentazionipugliesi.it)

#### Taralli with emmer flour and flax seeds



Typical Apulian bakery product with emmer flour and flax seeds, made with extra virgin olive oil.

##### Ingredients

Emmer flour 60% (contains gluten), white wine (contains sulphites), olive oil, extra virgin olive oil, flax seeds 3%, salt. May contain traces of soy, sesame seeds and milk derivatives.

##### Packaging details

200 g, packed with paper bag and tag.

##### Shelf life

12 months

##### International certifications

Brc, Ifs, Icea Bio

**VALLEDORO**  
[www.valledorospa.it](http://www.valledorospa.it)

#### Sattelli integrali



New breadsticks with wholemeal flour, to make them delicate and genuine, and sprinkled with rock salt, to make them tasty and crunchy. To be enjoyed alongside main courses or as a tasty snack. High in fibre.

##### Ingredients

Wholemeal wheat flour, sunflower oil (10%), salt, yeast, dried wheat sourdough.

##### Packaging details

240 g

##### Shelf life

240 days

##### International certifications

Brc, Ifs

**TERRE DI PUGLIA**  
[www.terredipuglia.it](http://www.terredipuglia.it)

#### Taralli Gourmet Box - Cheese And Pepper



Terre di Puglia presents the new line of 'Taralli Gourmet Box': Taralli Cheese and Pepper taste, with extra virgin olive oil, in an elegant box with window. A new version of the most iconic Apulian snack.

##### Ingredients

Taralli Cheese and Pepper taste with extra virgin olive oil.

##### Packaging details

150 g

##### Shelf life

12 months

##### Certifications

Brc, Ifs

## #PERFECTTOMATCH

### COOKING CREAM

The advertisement for Sterilgarda Panna da cucina features a central image of a milk carton being poured into a bowl of green soup. To the right, a plate of ravioli is shown. Below the main image, there is a small illustration of a pepper grinder and a bunch of fresh herbs. The Sterilgarda logo is prominently displayed at the bottom, along with the website address STERILGARDA.IT.



## THE STUDY

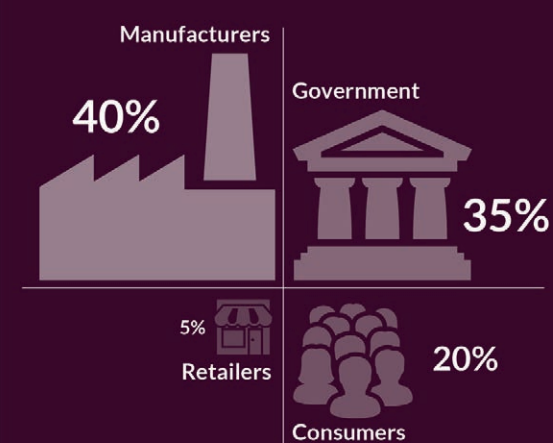
# Europeans like sustainable shopping

**Did Coronavirus make consumers forget about environmental issues? Are they still interested in choosing eco-friendly packaging? The GfK report #WhoCaresWhoDoes investigates the relation between companies' CSR and purchasing habits across Europe.**

### La spesa sostenibile piace agli europei

GfK presenta il report #WhoCaresWhoDoes, nato nel 2019 per indagare quanto influisce la Csr dei brand alimentari nelle scelte dei consumer. Emergono shopper sempre più consapevoli, attenti alle iniziative a sfondo sostenibile proposte dai brand. Un ruolo essenziale lo giocano le generazioni più giovani che, sulla scia delle proteste pacifiche dei Fridays for Future, influenzano gli acquisti delle persone che li circondano. Il riciclo della plastica e la salvaguardia ambientale non sono trend passeggeri, ma preoccupazioni consolidate che incidono sulla scelta dei marchi da acquistare.

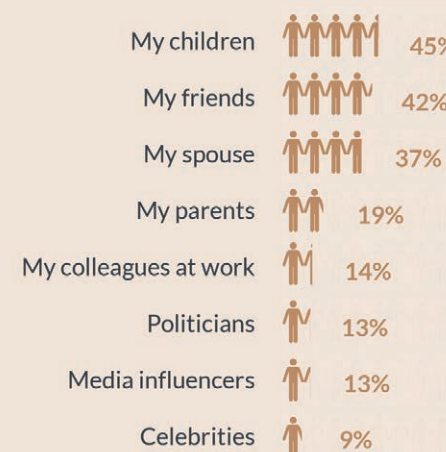
### Who can make the biggest difference to control and limit environmental damage (EU 10, 2020)



### I have stopped buying some products/services because of their impact on the environment or society

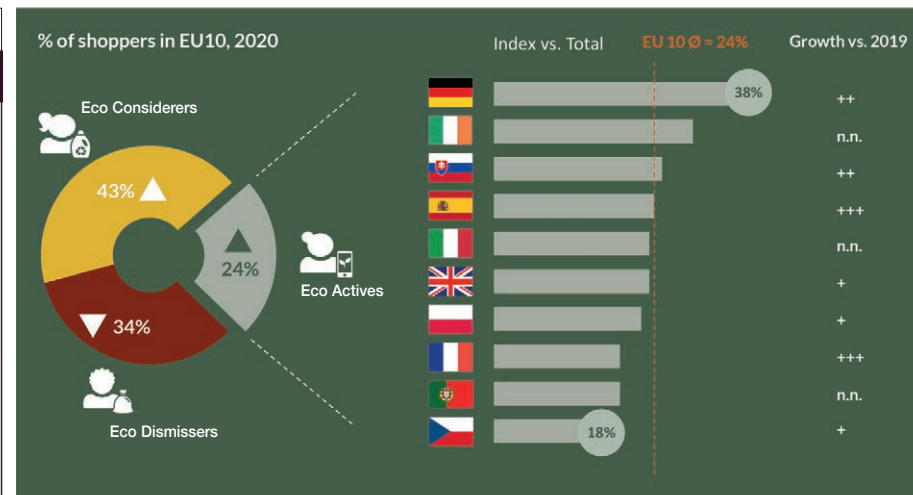


### Most likely to impact shopper's behaviors regarding the environment? (% yes, EU 10)



### Categories in which shopper think their purchase decision can make an impact to protect the environment

EU 10		
1		Fresh foods such as fruit and vegetables
2		Household care products such as laundry detergents, cleaners
3		Paper products such as toilet tissues, paper towels, other tissues
4		Personal care products such as shampoo, deodorants, toothpaste
5		Meat
...	...	...
10		Frozen foods
11		Hot drinks such as tea, coffee



Climate change and environmental damage have been the hottest topics of 2019. A special mention goes to Greta Thunberg and the 'Fridays for future' demonstrations. But 2020 has introduced a new burning subject, which is the spread of Coronavirus and its consequent global health emergency. GfK, global expert in data and analytics, conducted the research #WhoCaresWhoDoes in more than 20 countries worldwide to find out what consumers think when they do their shopping. Moreover, it explores how the CSR of food brands affects the purchasing process of consumers. 10 European countries were involved: Italy, the UK, Ireland, Germany, France, Slovakia, the Czech Republic, Poland, Portugal and Spain. The survey required the cooperation of the research institutes Kantar and Europanel, and it displays a general overview of the role of sustainability in Europe.

### Eco-aware decision making

Greta Thunberg drew the attention of an array of relevant topics, such as plastic recycle and the effects of the manufacturing process on the environment. Fires in the Amazon rainforest and in Australia during the summer of 2019 highlighted the need to act immediately. Did something change in 2020? It is obvious that Coronavirus turned consumers' lives upside-down. Staying at home for a long period of time changed their habits and even created new ones. Although 2020 completely reshaped the world, the survey conducted by GfK shows that plastic waste remains the most important challenge for European citizens. In particular, Northern European countries seem to be more sensitive towards the recycle theme.

Consumers are increasingly aware of their role. They know that their purchases can somehow affect the world. Consequently, 3 out of 10 European households stopped purchasing those items that can be harmful to the community and the environment. Consumers shape their decisions according to different standards, such as plastic waste and the existence of a plastic-free option.

On the contrary, in Southern Europe citizens are more interested in environmental issues. Climate change is perceived as a concrete problem which has to be solved. Global warming and forest fires are so important that 4 out of 10 Europeans claimed that they feel personally affected by environmental issues. Moreover, consumers are not alone when it comes to select the right brand to buy. Their behavior is influenced by their surroundings.

Children in the first place (45%), followed by their friends (42%), their spouse (37%), their parents (37%) and their colleagues at work (14%). At the bottom of the chart are politicians (13%), followed by media influencers (13%) and celebrities (9%), which do not seem to be much influential.

### Three different types of consumer

Based on the purchasing behavior of consumers, GfK managed to identify three different types of shopper. Eco Active shoppers feel responsible for environmental issues, so they try to make significant steps to stop climate change. In 2020, 34% of Europeans avoided packaging waste through their shopping behaviors. Within this category, Germany displays the higher number of people involved (38%). Other countries follow: Ireland, Slovakia (25%), Spain (24%), Italy and the UK (both 23%). On this point, France and Spain record the highest increase in terms of Eco Active shoppers.

Eco Considerers – the second consumer category – account for 43% of Europeans. They are concerned about plastic and they occasionally make steps to reduce their waste. However, they think that the emphasis for ac-

tion should be placed on companies and governments. The remaining 24% belongs to the Eco Dismissers category, which has no interest in plastic waste challenges and, consequently, lacks awareness on environmental concerns. Although there are many consumers who are completely indifferent to this type of issues, the GfK survey illustrates that the concern towards plastic reduction is not temporary. As a matter of fact, purchasing behaviors remained unaltered even when the public opinion focused on more recent news.

### The Italian scenario

Within this complex landscape, Italy emerges as a very careful country towards the theme of sustainability. 65% of interviewees claimed that they belong to the Eco Active category and that they really care about plastic waste. 30% claimed that they avoid plastic packaging and they would rather buy plastic-free options. Moreover, 36% of consumers definitively stopped buying plastic items because of their negative effects on the environment. Italian consumers have higher expectations than the European average: half of the Italian households believe that companies should provide customers with recyclable and biodegradable

options. As a demonstration of this trend, 62% of Italians choose those companies that publicly declare their interest in environmental issues and undertake ad-hoc ventures. Ironically, 58% of families are not aware of the final destination of recycled items. Lastly, Italians think that their choices can be more effective on protecting the environment when it comes to home care products such as laundry detergents and cleaners. As a matter of fact, this category requires a massive amount of plastic.

### A never-ending responsibility

The GfK survey portrays a clear overview of what European citizens think about sustainability. Even though the topic of hygiene held the stage worldwide, other burning issues were highlighted during the pandemic. The 'Fridays for future' demonstrations made the youngster realize that they can have a huge influence on the purchasing habits of their parents. On one hand, single consumers prefer sustainability also when they do the shopping. On the other hand, companies and retailers should take into consideration that sustainability is a key factor within the manufacturing process. Therefore, it cannot be excluded from the whole shopping experience.

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# Harsh tariffs

**Duties imposed by the Trump administration and the effects of the pandemic have slapped on Italian exports of deli meats and cheeses. Will Biden start a new era of economic relationships between the two sides of the Atlantic?**

## THE ECONOMIC IMPACT OF DUTIES AND COVID-19 ON ITALIAN EXPORTS TO THE US

### The deli meat industry

In the analysis of the effects that these impositions have had on Italian exports of deli meats to the US, beside the additional 25% duty (previously it was 0.8 cents per kg) the devastating impact of the pandemic must also be taken into account.

During 2018, Assica, the Italian association of meat and deli meat manufacturers, reports that



shipments of cured salami reached 600 tons (+43.8%) for a value of 6 million euros (+44.5%), while shipments of mortadella stood at 683 tons (+25.6%) for over 3.7 million euro (+34.2%). Exports of salami and mortadella jointly accounted for 12.9% in volume and 8.4% in value of total exports to the US.

In the first half of 2019 results were still positive: +11.7% in vo-

lume (5,063 tons) and +7.3% in value (57.2 million euros). Salami concerned 417 tons (+98.7%) at 4.4 million euros (+106%); while mortadella concerned 381 tons (+22.7%) equal to 2.3 million euros (+34.1%). After recording a strong decrease in the last quarter of 2019 (-47.7% in volume and -42.2% in value), in the first nine months of 2020 salami recorded a severe 13.9% drop both volume and value.

"The Trump administration penalized some Italian delis but not PDO hams which are probably our most exported product, and this alleviated the negative effects of duties", claims Assica's director, Davide Calderone. "Nonetheless, the affected products (salami, mortadella and cooked delis) were experiencing a strong growth rate in the market, which suddenly stopped. We hope that the new administration will review the

country's trade policy, eliminating tariffs for all sectors, not just ours. Duties are conceptually unacceptable in a free market economy".

### The cheese industry

According to Assolatte (Italian dairy association) data as of September 2020, Italian cheese exports to the US posted a 26.4% decline last year. The slowdown had already begun in the last weeks of 2019, after the overwhelming results achieved before the introduction of tariffs.

"In 2019 we exported 167,852 wheels to the US, with a 9.04% increase over previous year. After a sharp rise prior to the introduction of tariffs, there was a contraction in the last weeks of 2019. A small recovery was then recorded in early 2020, but in the following months we registered a decrease close to 10%. Hence, last year the Covid-19 pandemic effects added



up on duties and the overall trend for 2020 is negative," explains Renato Zaghini, president of the Grana Padano protection Consortium. The same trend was observed by Parmigiano Reggiano producers, as explained by the president of the protection Consortium, Nicola Bertinelli: "The shut-down of deli shops and restaurants, as well as the psychological impact on consumers have had a big impact on

consumption and consequently on trade. During the first half of 2020, exports to the country reached 5,025 tons, which is in line with the results achieved over the same time on the previous year, when they amounted to 5,107 tons. Therefore, I would not speak of a real decline but rather of a slowdown in growth".

The data provided by the gorgonzola protection Consortium is also significant, which speaks of 18,563 Gorgonzola wheels landed in the US in the first nine months of 2020, against the 31,375 wheels of 2019. The situation is complicated also for Asiago producers, considering that since October 2019 a 36% import duty weighs on Asiago cheese. According to its protection Consortium, "in 2020 projections show a nearly 30% decrease in exports due to the pandemic and the effects of duties."

US tariffs on EU products are part of a 30-year-old dispute between plane makers Airbus and Boeing. In 2006, the US filed a case with the World Trade Organization (WTO) claiming that Airbus - jointly owned by Germany, France, Spain and Britain's BAE Systems - had received 22 billion dollars (19.4 billion euro) in illegal subsidies. Similarly, the EU claimed that Boeing had received 23 billion dollars in subsidies from the US government. Over the years, the WTO has ruled that both sides unfairly subsidized their aircraft makers.

Ruling on the US sanctions request, in October 2019 the WTO allowed the US to impose tariffs on up to 7.5 billion dollars of EU goods, the largest award in the trade body's history but well below the US request for 11 billion in trade each year. Consequently, the US im-

posed additional tariffs of up to 25% on some EU and UK products. In the agri-food sector, they apply to Italian specialties like Grana Padano, Parmigiano Reggiano, Asiago, Gorgonzola, salamis and mortadella, as well as French wines and Swiss Emmentaler. Washington has the option of periodically modifying the list of targeted products and has already revised it twice to keep the pressure on its transatlantic trade partners. In November 2020, the WTO allowed the EU to impose tariffs worth 4 billion dollars on US goods and the EU has prepared its own list of US products for countermeasures, which includes ketchup, cheddar cheese, potatoes, salmon, nuts, vanilla, cocoa, chocolate and spirits, just to name a few.

So far, both sides have blamed each other for not showing any interest in talks to resolve the dispute. Now, both US and European food & beverage producers, which have been severely affected by such a long-lasting trade war, hope for warmer relations under Joe Biden's administration.

### Dazi amari

Le tariffe imposte da Trump e le conseguenze della pandemia hanno inciso pesantemente sulle vendite di salumi e formaggi italiani negli Usa. Ma con Biden si auspica una politica commerciale più aperta.



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# OUTLOOKS

## Get a share of this cake

An in-depth focus, by Euromonitor International, on the Chinese bakery and confectionery market, which is expected to double its values over the next five years. It provides interesting and useful information to both manufacturers of ingredients, processing and packaging solutions.

China's bakery sector has been expanding rapidly in recent years, underpinned by the country's rising middle class, ongoing Westernization of lifestyles and diets, and increasing demand for convenient food options, as stated in a report issued by the United States Department of Agriculture, and based on Euromonitor International data. According to estimates by the research institute, retail sales of baked goods in China, both packaged and unpackaged, reached 34 billion dollars in 2020, comprising 9% of global retail sales. This makes China the world's second-largest baked goods retail market after the United States, standing at 67 billion dollars.

"Furthermore, the growth potential for China's bakery sector is unparalleled, given the country's population and relatively low consumption base", the reports highlights. "Per capita consumption of baked products is currently 7.2 kilograms (kg) per year, compared to 22.5 kg in Japan, and 40.2 kg in the United States". Euromonitor International forecasts that, by 2025, retail sales of baked goods in China will grow to 53 billion dollars, rising 53 percentage points.

### The ideal consumer ID

Westernstyle pastries are starting to compete with traditional Chinese varieties and are becoming a daily food item for many middle-class urban consumers. Breakfast, snacks, and celebrations are the main occasions for baked goods consumption in the country, with the most popular products being cakes, pastries, and bread. The consumer demographics skew female and young: about 65% of Chinese consumers of baked products are women, and more than 80% are born after 1980, according to Daxue Consulting.

### Cake mania

Cakes currently account for 41% of overall baked goods retail sales in China, with an annual value of 14 billion dollars. According to Euromonitor International, retail sales of cake saw a compound annual growth rate (Cagr) of 8.3% from 2015-2020 and are expected to keep the same pace over the next five years.

Visually appeal and flavor variety are important to Chinese consumers. Among the businesses meeting that demand is 'Bliss Cake', one of China's fastest-growing bakery chains, which offers an exclusive e-commerce platform and markets a signature

cake with multiple slices featuring different flavors.

### Pastries are flying high

Pastries - which Euromonitor categorizes as including fresh and packaged biscuits, cookies, croissants, donuts, and others - are the fastest-growing category of baked goods in China, with a Cagr of 10.5% during 2015-2020. Pastries comprise 40% of bakery sales (13 billion dollars annually) and are expected to overtake cakes in sales in 2024.

Filled biscuits have become very popular among white-collar workers in large cities, who are keen to experiment with new products offering indulgence and convenient snack options. Diversity in flavors and product innovations help expand demand for these products.

### Why not (just) bread?

Bread, predominantly leavened bread sold both packaged and unpackaged, accounts for 18% of Chinese bakery sales (valued at 6 billion dollars), having maintained a 9% Cagr during 2015-2020. Euromonitor research found that increased fresh milk intake goes hand in hand with higher bread consumption, as more Chinese consumers think that bread is a better complement to milk than traditional breakfast items such as rice porridge and meat buns. In addition, unlike traditional breakfast, milk and bread require minimal preparation, thereby making them attractive to a large class of office workers.

Whole wheat sandwich and white bread are the two most popular

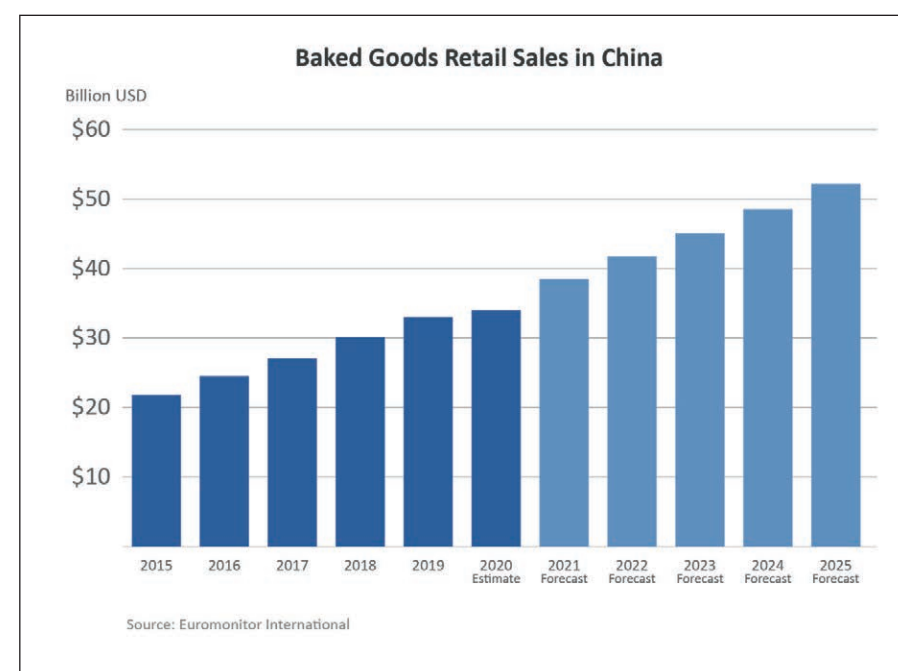
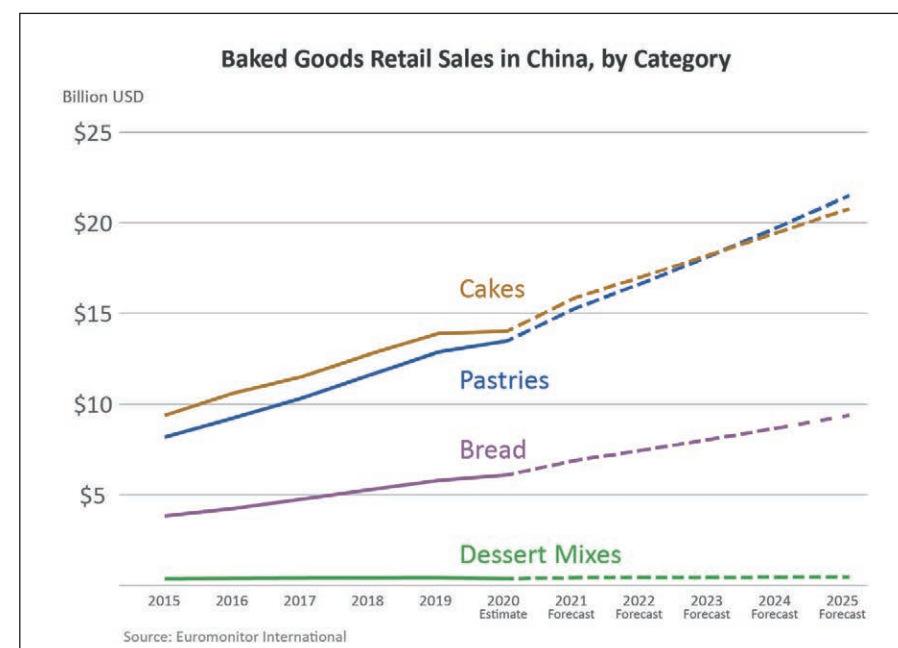
varieties, as Chinese consumers generally prefer soft, springy bread products over harder ones such as bagels and baguettes. Whole wheat bread is also perceived to be a healthy product and thus is popular among the health-conscious elderly and young female consumers. Flavored varieties such as green tea or fruit breads are also performing well, especially among children and teenagers.

### The changes brought on by the Pandemic

The Covid-19 pandemic has negatively affected the Chinese bakery. Having largely maintained double-digit annual growth in the preceding decade, the baked goods retail sector is expected to grow just 3% in 2020 according to Euromonitor. Both packaged and unpackaged baked goods have suffered, though the unpackaged segment has been hit harder due to shorter shelf life, consumers' limited access to retail outlets, and increased concerns about food hygiene.

Cake sales have been hit especially hard by the disappearance of large celebrations during quarantine and social distancing measures. Bread has fared better than other baked goods categories because of its staple status and diverse range of potential uses.

E-commerce, already on the rise before the pandemic, has gained more market share in 2020 due to minimized social contact, general convenience, and more competitive pricing. Baked goods sales are expected to have a strong recovery, with Euromonitor forecasting a 13.3% increase in 2021.



### THE OREO COOKIE CASE STUDY

When the century-old, black-and-white cookie was first introduced in China in 1996, sales were only mediocre. By surveying Chinese consumers, Oreo's manufacturer found they preferred a cookie with less bitterness and less sweetness. As a result, the company revamped its recipe for the Chinese market to make the biscuit part more chocolatey and the cream less sweet. Other innovations followed, including green tea flavored cream, Oreos in rectangular wafer form, and straw-shaped wafers with vanilla-flavored cream. As a result, Oreos are now one of the best-selling cookies in China.



### Cina: esplode il business dei dolci e dei panificati

Il mercato cinese dei dolci e dei panificati è in forte espansione, trainato dal consolidarsi della classe media, un'occidentalizzazione degli stili di vita e delle abitudini alimentari e una crescente richiesta di prodotti pronti all'uso, come evidenzia un rapporto pubblicato dal Dipartimento dell'agricoltura americano sulla base di rilevazioni Euromonitor. Che evidenziano come, nel 2020, le vendite di dolci e panificati, sia sfusi che confezionati, all'interno del canale retail abbiamo raggiunto il valore di 34 miliardi di dollari e rappresentano il 9% delle vendite totali. Un dato che posiziona il mercato cinese al secondo posto, per volume d'affari generato, dopo gli Stati Uniti, primi con 67 miliardi.





## INTERVIEW

# Japan: instructions for use

**Old and new consumption habits in a country which cares a lot about tradition. But which is in love with innovations. A market full of opportunities for food & beverage Italian companies. Provided that... Interview with Emanuele Bonsignore, deputy president of Aeon Italy.**

Food is a fundamental part of Japanese culture. And it is associated with the many festivities which are celebrated during the year in the country. A nationalist attitude leads consumers to choose local products and brands, yet the attention to what is new and to the latest import trends is still very high. Indeed, due to local restrictions, Japan is a strongly import-based nation in agrifood field. It is a fact which opens up interesting opportunities for Italian companies, provided that they are able to get the cultural specificities of a population that is deeply different from Westerners in terms of consumer habits. Interview with Emanuele Bonsignore, deputy president of Aeon Italy, Italian branch of Aeon Group, Japan's top retail chain.

### What habits do characterize Japanese consumers' diet?

The Japanese traditionally follow a light and balanced diet. Generally speaking, the three main meals of the day are experienced in a very different way from Westerners' habits. For example, breakfast is a complete meal, mainly based on typical dishes. Only the most 'westernized' people opt for continental breakfasts similar to ours. Considering that the day is clearly marked by working hours, lunch is light and fast and often consists in food prepared at home and consumed at the desk. The lunch break is extremely brief, and sometimes it can last even about 20 minutes. With respect to dinner, the Japanese consume many ready-to-meals, considering that family units are on average small and a lot of people live alone. Anyway, habits can vary from big cities like Tokyo to peripheral districts.

### Are there food trends which are particularly felt, at the moment?

In the last few years, there is a growing attention to sugar and carbohydrates reduction. It is especially true in the market of beverage and energy drinks, which is highly developed in Japan. More broadly, there is a growing attention to the whole healthy food sector, although with different care, for example, from Italy.

### What do you mean?

The segment of gluten free products, for example, which in Italy has developed a lot in the last few years, hasn't had great opportunities in this market yet. Instead, as for the so-called 'junk food', in Japan it finds room only among young people, while it is practically nonexistent with reference to other segments of the



Emanuele Bonsignore

### Giappone: istruzioni per l'uso

Il Giappone, a causa delle limitazioni territoriali, è una nazione fortemente import-based in ambito agroalimentare e costituisce per questo un mercato ricco di opportunità per le aziende italiane del food & beverage. A patto che posseggano i requisiti necessari e che sappiano cogliere le specificità culturali di un popolo profondamente diverso, nelle abitudini di consumo, dagli occidentali. Intervista a Emanuele Bonsignore, deputy president di Aeon Italia.

population, who remain faithful to traditions and local dishes.

### Is there sensitivity concerning themes such as animal welfare, clean label or organic, which have revolutionized Italian food in the last few years?

They pay more attention than before to these subjects but, in general, the predominant focus in purchases is still the 'made in Japan'. The interest in the organic food market is gradually growing. Indeed, international formats, such as for example 'Bio c'Bon', are opening stores in the country and offering new opportunities to Japanese customers who start approaching organic food.

### Themes related to sustainability, which are central in companies and retailers' projects in Italy and Europe, are also important for the Japanese market?

Of course there is an awakening in this sense, and, from last year, also in Japan distributing plastic bags for free was forbidden to merchants. Today a lot of shopping bags made up of recyclable materials are sold (it is an independent market which is growing a lot). However, the regard that the average Japanese consumer has for the packaging of a product has little to do with sustainability, but rather with the degree of food safety that it can assure. What we will define 'overpackaging', when every single component is wrapped individually, is the norm for the market and for consumers' awareness.

### What has been the impact of the pandemic on local food consumptions?

Before the health emergency, Japanese consumers used to make small purchases every day. After the beginning of the pandemic, the trend has obviously become that of making a bigger purchases so that they can go out less. More in general, due to the current retailers are being forced to adapt. Although Japan is already ahead from a technological point of view, it is experiencing a change in habits which also involves a new approach to consumptions.

### What role do Private Labels play in the market?

The sector of Private Labels continues to grow. Just to be clear, about a third of the purchases made by Japanese retailers today are destined to the creation of Private Label products. Our very group has set up a branch company solely dedicated to Private Labels. The reasons for this development also are, partly, cultural.

### How?

Both for food and clothing, the Japanese market is characterized by different and mostly reduced formats and sizes. Just to give an example that, without trivializing, can represent the global market: while in the Usa drinks are sold in bottles of more than one litre, the European market generally uses bottles of about 500 ml, in the case of Japan the average format is no more than 250 ml. That is the reason why companies and importers often choose to enter the market through Private Labels, which are characterized by packaging precisely conceived to meet the specific demands of this market (single-portion meals and reduced formats, they also often help a more correct positioning in terms of shelf price).

### As for imported products, what positioning has made in Italy got in Aeon group stores?

Japanese consumers see made in Italy products as something 'particular'. After French food, we certainly are the most successful country in terms of products and proposals towards consumers. Clearly, in these times when there is no chance to travel abroad, we are witnessing a greater preference for local food, although there is still a strong focus on everything that comes from outside.

### What are the sectors where the presence of import products is stronger? Instead, what are the areas with greatest growth potential?

There is two things that we have to bear in mind when we talk about import in Japan: the first one is the food production rate that, in the country, is very low. This means a big boost to imports of food and ingredients from abroad. The second thing is the deep nationalism which tends to preserve national producers and to protect them from import products, through the imposition of duties or very rigid and complex regulations. Of course some categories, such as for example wine – which is not produced in Japan – are subject to a massive presence of

imported products. However, I think that the biggest potential can be expressed with particular and innovative products, which often set trends able to last even for years.

### Is the food market characterized by particular seasonal events?

Definitely. Like every country, there are feasts which are celebrated differently and which involve the consumption of particular products. Generally, during festivities Japanese consumers prefer traditional food, and it is very important, for the Japanese culture, that it is fresh and seasonal. Although a lot of Japanese people are not Christian, they celebrate Christmas anyway with a cake and a bottle of Champagne. The same goes for different 'international' festivities, such as New Year's Day, Valentine's Day and Mother's Day.

### What would you suggest to an Italian company willing to enter the Japanese large-scale retail market?

I would like to give two pieces of advice. The first one is to be patient. Indeed, entering this market takes on average a long time. The second one is to be structured. Companies without necessary certifications or which have not a back office able to guarantee, in a professional and prompt way, all the necessary documents, are unlikely to succeed. If they own such qualities, Japan offers plenty of market opportunities.

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## “MADE IN ITALY FOR ASIA” IS BORN

Tespi Mediagroup, multimedial group operating in publishing and communication, has gone into partnership with the Italian branch of Aeon group – the largest Japanese retailer and one of the largest in the world – to create a digital magazine which will provide the buyers of the group with firsthand information about the innovations proposed by the Italian companies operating in food and non-food sector. “With Made in Italy for Asia our range of publications addressed to foreign buyers expands,” underlines Angelo Frigerio, Ceo of Tespi Mediagroup. “Along with The Italian Food Magazine, the first magazine addressed to retailers and distributors worldwide, Made in Italy for Asia is a strategic tool to lead buyers in the sell-in.” He is echoed by Emanuele Bonsignore, Deputy President of Aeon Italia: “With the publication of Made in Italy for Asia we want to provide our buyers with a periodic review of the most significant innovations proposed by Italian companies in both food and non-food sector. This information will be an excellent basis for the future purchasing strategies of Aeon group.”

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# TRADE Welcome to Norway

**The insufficient local food production encourages exports to the Northern country. A market though regulated by custom tariffs and an oligopolistic distribution system. Complexities and challenges for Italian exporters in a report released by the Italian Trade Agency.**

The Norwegian economy can count on few strategic activities. The first one is the sea. Due to a technically advanced fleet, Norway stands out for its fishing activity. As a matter of fact, it is in 10th place in the global ranking of countries with the biggest quantity of sea fish caught. The area beyond the Arctic Polar Circle, near the Lofoten Islands, is the richest in fish. After being disembarked, all fresh ma-

terial undergoes the first step of manufacturing. It is then destined to the big processing factories located near Bergen. Yearly earnings which derive from fish exportation account for 6.7 billion euros. From 1999 onwards, the value generated by aquatic farming/aquaculture has overtaken traditional fishing and, nowadays, it accounts for two-thirds of the fish market sales.

The other fundamental economic source for the country originates from the offshore hydrocarbon deposits located in the North Sea. In 1971 they started to provide Norway with a remarkable energy refueling, even though today the oil extracted is mainly exported (as for exported items, oil is at the top of the national charts). 87% of the whole national energy comes from hydroelectric energy, while 6% comes from wind energy. Natural gas, also, is destined to the global market and it has its origin in the Troll pond, one of the largest deposits in the world. 30% of its extraction is controlled by Norwegian companies, 56% is held by the Government, while the remaining percentage is destined to foreign firms.

Even in the manufacturing process, Norway stands out for a few strategic sectors. Starting with metallurgy and chemistry, and proceeding with the production of alumi-

num. Mechanical industry is well developed as well. A special mention goes also to the Norwegian forests, which cover 38% of the country and account for one million km<sup>2</sup> (however, its dimension is constantly increasing). 70% of the national woods is considered to be economically exploitable.

#### The exchange with Italy

In 2019, the commercial interchange between Italy and Norway generated 2,99 billion euros. Italian exports accounted for 2,6 billion euros, but this rate decreased compared to 2019. At the top of the exportation ranking there is machinery (588 million euros), followed by beverage (105 million), aircrafts and spacecrafts (103 million) and wiring equipment (60,6 million). On the contrary, Italian imports from Norway accounted for 1,11 billion euros (-3.1% compared to 2018) with positive financial statements for Italy equal to 771,4 billion euros. Compared to 2018, it increased by 25.8%. Italy holds 2.8% of the Norwegian exchange rate and ranks 8th place in the European ranking. The Netherlands, Sweden, Germany, China, the US, Denmark and the UK are the main commercial partners of Norway worldwide. The European Union is the first destination area for the Norwegian

export (69.3%), followed by Asia (16.5%) and North America (9.2%).

#### Agriculture and animal farming

More of the half of the (little) farming area available is destined to the production of fodder for livestock, which accounts for almost the whole production of meat and dairy products in the country. The zootechnical assets include almost 2 million bovine species (the number of dairy cows is increasing), almost 1 million ovine species (sheep are decreasing, whereas dairy goats are slightly increasing), 1,5 million pigs (whose quantity is rising) and 4 million birds. In the last 10 years, the number of farmers who actively work has constantly decreased. There are approximately 39,000 farms, but in 2019 they decreased by 18%. Moreover, in the last 30 years, the industry professionals have reduced by 60%. Cereals, barley, wheat, oat, potatoes, legumes, vegetables and fruits are the major farming productions.

#### Food market and imports

Norwegians spend, on average, 12% of their personal income in food shopping. In the last few years, sales of ready meals have considerably increased. However, fruits, milk, wheat and rice still remain at the top of the charts of food con-

sumption per capita. Only 3% of the Norwegian surface is dedicated to farming, therefore the country has to import big quantities of food. In 2018, for example, Norwegian food imports exceeded 6,5 billion euro. They are still rising, despite the high tariffs reserved to some product categories (in particular, to the competitors of 'made in Norway' items). It happens with meat and delis, milk and dairy products, bovine and birds' offal, glucose, sugar and derivatives. Cereals, berries, potatoes, carrots and cucumbers follow. Duties for processed food are medium-high, such as confectionery, chocolate, biscuits and sweet pastry, pasta, pizza, sauces, soups, ice cream and food which contains less than 20% of meat. On the contrary, lower tariffs are applied to fish and other items produced outside Norway, such as shellfish, sugar, coffee, rice, corn, orange and grapefruit juice, bananas, oranges and kiwi fruits. In April of 2017, Norway signed an agreement with the European Union to promote the bilateral trade of farming items, allowing European exporters to strengthen their position within the country. In the last 10 years, European farming exports towards Norway have been constantly increasing and today they account for around 2.5 billion euros.

#### Benvenuti al Nord

La scarsa produzione alimentare locale spinge l'export verso la Norvegia, dove le importazioni agroalimentari, nel 2018, hanno superato i 6,5 miliardi di euro. E sono in costante crescita, favorite anche da un sistema tariffario nel complesso favorevole, fatta eccezione per alcune categorie merceologiche. Le grandi criticità e opportunità per il made in Italy in un report dell'Ice Agenzia.

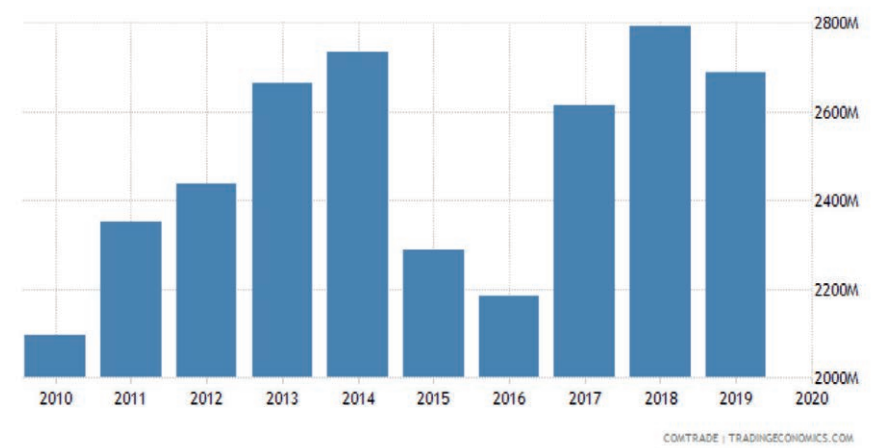
#### The large-scale distribution

In Norway the large-scale distribution market is controlled by three big players. The first one is the Norgesgruppen Group, which controls 43.2% of the market and holds several chains, such as Ultra matvarehuset, Meny, Kiwi, Spar, Joker and Mix. In second place there is Coop, which holds 29.3% of the market and 500 shops based on different concepts: Mega, OBS, Extra, Prix and Matkroken. There is also Rema 1000, a supermarket franchise which can be found in Norway and Denmark. Its market share is equal to 27.3% and its name refers to the 1,000 items that consumer can purchase within the shops, which can be customized by the franchisees. Moreover, Rema 1000 holds 82% of Kolonihagen, which is specialized in organic and local items. It is also part of Kjeldsberg (which produces coffee) and Salatmesteren (which deals with salads). In addition to the three big players, there is also a minor contributor. It is Bunnpris, a national chain which counts 216 shops.

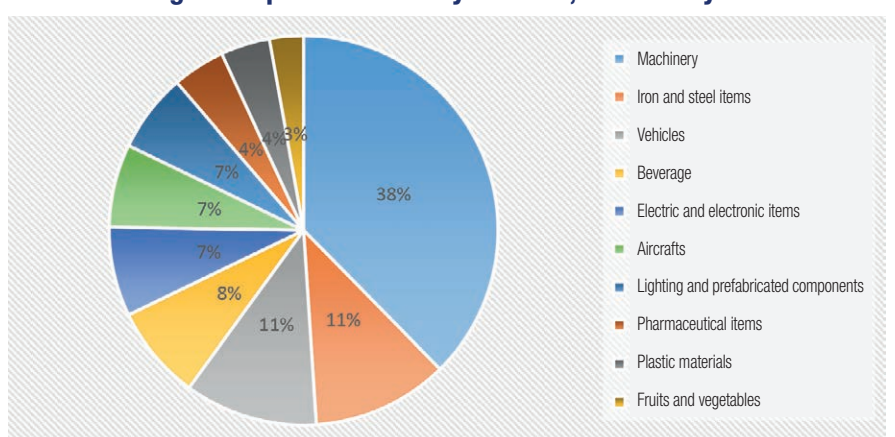
#### Customs barriers

Since it is part of the European Economic Area, the Norwegian market is easily accessible for foreign companies. However, the farming and the fishing sectors keep displaying a non-liberalized trading scheme. Raw materials and manufacturing machinery are usually exempted from import duties. Imports are subjected to VAT at 25%, whereas food items at 14%. As for transportation, VAT is at 8%. The country is still setting harsh restrictions on the imports of farming items which derive from private companies (no more than 10 kg of meat, derivatives and dairy items). There are neither customs duties nor restrictions on olive oil. On the contrary, some strict rules are applied to the wine and spirits category, which is controlled by Helsedirektoratet (the healthcare management) and Tollvesenet (the customs authority). The state company Vinmonopolet is the only organization which is authorized to sell alcoholic drinks with more than 4.7% of alcohol content in supermarkets. Moreover, Norway has a preferential tariff system with duties at 0% for the importation of those items which come from 79 developing countries.

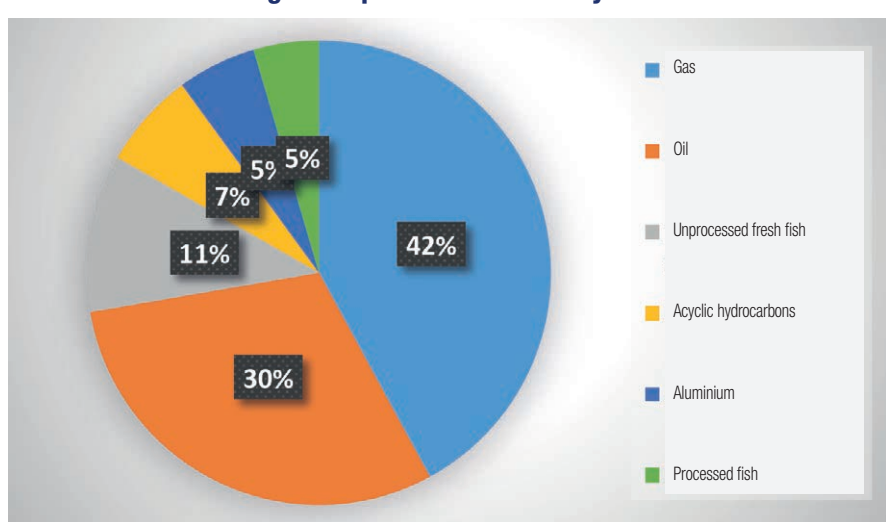
Norwegian imports from Italy from 2010 to 2019 (million euros)



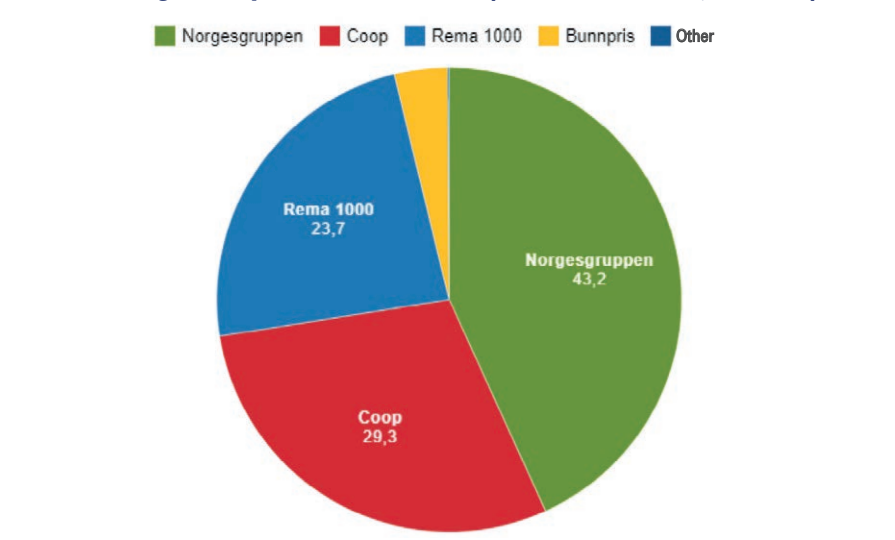
Norwegian imports from Italy in 2019, divided by sector



Norwegian exports towards Italy in 2019



Norwegian supermarket chains (market share %, in 2019)







# The Chocolate War

**The drop in demand owing to Covid-19. The payment of the tax on the crop. The purchases through the futures market. The clash between multinationals, Cote D'Ivoire and Ghana.**

The chocolate multinationals and Cote D'Ivoire and Ghana, which produce 70% of the global cocoa, are in conflict. The surplus of beans, due to the fall in global demand because of Covid-19, is driving some American giants to ask for the suspension of the payment of the tax of 400 dollars per tonne, introduced by African producers on the 2020/2021 crop to award a prize to the farmers who earn on average 2.5 dollars per day (approximately 2.05 Euros). So, the big global groups are starting to buy cocoa on the ICE future exchanges. It is a manoeuvre which is not only making the price for cocoa run up, but which also saves the buyers from paying the premium. Indeed, by purchasing in deposits the beans produced before the norm (in force since 1st October on the new production) the companies avoid paying the tax. In this way, purchases stopped and the futures price

on cocoa rose rapidly to 2.915 dollars per tonne at Ice in New York. A move that allows to conclude short-term contracts and save a lot of money.

Cote d'Ivoire and Ghana have immediately reacted, threatening to cancel the sustainability programmes of the multinationals which ask for the suspension of the payment of the tax on cocoa. The American company Hershey is one of those which have decided to benefit from futures contracts. Therefore, the two African producers have sent a letter to the multinational, accusing it of conspiracy and threatening it to suspend the guarantee certificates on the ethical origin of the raw material. In this way, it will be impossible to track the product and prove to consumers that cocoa comes from plantations where minors have not been employed. Hershey has responded declaring that the whole 2020/2021 cocoa crop, bought within its supply chain after the introduction of the tax in West African countries, includes the premium. Nevertheless, the multinational's decision to stock up on the futures market is likely to be followed by other companies of the sector, generating a knock-on effect which could extend to the European market too.



## La guerra del cioccolato

È scontro tra Costa d'Avorio e Ghana, produttori del 70% del cacao mondiale, e le multinazionali del cioccolato che, per via di un calo della domanda causa Covid-19 e un surplus di produzione, cercano di non pagare la tassa istituita dai produttori africani per dare un premio agli agricoltori. Ne abbiamo parlato con Giovanni Agostoni, direttore commerciale di Icam, azienda italiana specializzata nella produzione di cioccolato e semilavorati del cacao.

## THE INTERVIEW

# Icam's ethical business

Icam is an Italian company specialized in the production of chocolate and cocoa semi-finished products and attentive to the theme of responsibility towards the supply chain, both in terms of workers and environment. Indeed, taking care of the whole production process and making sure that each of its phases proceeds ethically, from the cultivation of the plants to the final product, is the basis of the philosophy of the Agostoni family's business, who leads the company since 1946. Interview with Giovanni Agostoni, sales manager at Icam.

### What do you think about the dispute between Cote d'Ivoire-Ghana and the chocolate multinationals?

As choice of company policy, from this year Icam has decided not to buy cocoa from the two mentioned countries, from which it always laid in supplies in very modest quantities anyway. Our approach to cocoa countries of origin has always been aimed at establishing even collaborations which guarantee training for the farmers and a fair payment which contributes to improving their socio-economic conditions and those of their families as well. A different approach could not be considered at all by the company.

### The two producing countries have also suspended the guarantee certificates on the ethical origin of the raw material. Can this action compromise the multinationals' chocolate sales?

We do not know precisely what is going on, because we are distant spectators, but we believe that both parties can reach an agreement and smooth out the differences to respect their commitments. We don't think that the situation can cause particular problems on the market and the final consumer, but we do not have enough elements to carry out precise evaluations.

### How important are certifications?

Icam has always considered important the guarantee role played by independent control bodies, firmly adhering to the main ethical certification bodies. Moreover, the company has equipped itself with the '3P Program' self-certification used on the premium brand Vanini. The ethical certifications schemes combine a reduced environmental impact with better working methods and educational conditions, thus enabling farmers to obtain a higher profit, thanks to greater sales volumes, a better cocoa quality and higher prices. In particular, Icam's ethical certifications (which the company adopted several years ago) are: Fairtrade, Utz and Rainforest Alliance. In addition to ethical certifications, which are a decisive asset to work in respect of the environment and people, quality certifications are considered by the company one of the cornerstones of its own business as well.

### Do they have the same value on the national and international market?

Ethical certifications are issued by international bodies acknowledged worldwide as guarantors of the responsible companies who work in respect of the environment and the people involved in the production process. The fact that Icam is one of them enables us not only to position ourselves in the Italian market as a company which prefers an ethical approach to business, but also to excel at international level.

### From what countries does Icam buy cocoa for its productions?

The countries of Central and South America and some African countries, especially Uganda, are the main areas from which we stock up. More in detail, in 2019 the company bought more than 23 thousand tons of cocoa beans distributed in this way: 62% from Africa, 38% from Central and Latin America. In Peru and in Uganda we also activated some long-term collaborations with the cooperatives of local farmers to whom we guarantee training, resulting in increased crop productivity and fair payments. Moreover, in Peru we developed direct relationships with different local cooperatives, such as Aprocam, Acopagro, Cacao Alto Huallaga, Cacao Vrae and Cat Tocache.

### What is Icam Chocolate Uganda Ltd project?

In 2010 Icam, with the aim of exporting its own wealth of knowledge and realizing an important development project in the area, founded its own company in Uganda: Icam Chocolate Uganda Ltd. In Bundibugyo district the company created a collection and fermentation centre for fresh cocoa processing, picked by the farmers according to modern working methodologies. In this way we can provide support to local farmers through the training on modern agronomic techniques capable of exploiting the crops and, thus, improving the profitability of plantations. During the first fermentation tests, Icam Chocolate Uganda's agricultural technicians and Ugandan farmers were led by experts coming from Italy and other countries, who provided the know-how and the best cocoa processing techniques. The results achieved, in terms of production, economic return and positive impact on local communities, were immediately tangible. Moreover, we launched a collaboration project with the local nursery-men and the government authorities to facilitate the availability of seed and grow new plants. Indeed, in 2019 the company distributed about 2000 cocoa beans in Bundibugyo and 360 in Koboko with the aim, in the long run, of increasing not only the productivity of cocoa plantations, but especially of contributing to the reforestation of some areas of the country.

### Are you planning new projects?

In 2018 Icam set up a new project in Madagascar. Indeed, Makabio company was born thanks to a joint venture, with the specific objective of creating a model plantation of 250 hectares able to represent a qualitative outstanding feature in the international agricultural scene. The setting up of this new project was led by the company's will to enhance the rich genetic inheritance of the 'Fino de aroma' cocoa of Madagascar, at the same time contributing to the upgrading of deforested areas and to the local development of the cocoa agricultural sector. After identifying an area which is particularly suited to cocoa cultivation, the activities aimed at the creation and the management of the model plantation started, with the search, the selection and the consequent training of a team of 65 workers. Moreover, here we identified and bought lands for a total surface of 96 hectares which are destined to cultivation, contributing to the reforestation of waste lands with local trees and to the enhancement of the natural heritage of the island. During the preparation of the lands for their cultivation, 40 thousand cocoa small plants and 40 thousand shade plants were selected and planted in 50 hectares of ready land. Then we have selected 140 mother plants which are excellent in some plantations of the island and necessary for the future graft of cocoa plants. This project in Madagascar is particularly challenging, not only for the unpredictability of the climate in that area, but also due to the change in the global scenario marked by the advent of Covid-19 virus. Nevertheless, Icam firmly believes in the development of this project and will try to face all the difficulties which will arise in the best possible way.



Giovanni Agostoni



salumificiovolpi.it  
allfoodsalumi.it  
goldenfood.it  
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DELICATESSEN AND GASTRONOMY CONTEMPORARY

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