



FIERA MILANO

TUTTOFOOD
MILANO

Press Office
Fiera Milano

Rosy Mazzanti
Simone Zavettieri
+39 0249977457
+39 335 69992328
press.host@fieramilano.it

Press Office
Il Quadrifoglio
Italy
Elisa Facchetti
+ 39 02 36596033
account1@quacom.it
Foreign Office
Francesca Legnani
+ 39 02 36596033
press@quacom.it

Fiera Milano S.p.A.
+39 02 49977134
fieramilano@fieramilano.it
fieramilano.it

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AGRIBUSINESS, AFTER THE 2020 BOOM IN LARGE SCALE RETAIL DISTRIBUTION FROM TUTTOFOOD THE ANSWERS FOR POST-PANDEMIC RETAIL

- *IRI data confirm record increases for packaged food in organised distribution, particularly for fresh products by weight (+10.6% in value), frozen food (+12.9%) and beverages (+5%)*
- *For Retail Institute Italy, innovation and sustainability, as well as AI and automation, will be in the spotlight*
- *Retailers confirm investments in multichannel and sustainability, focus on excellence at the store and service content online*
- *Thanks also to the fact that TUTTOFOOD will take place simultaneously with HostMilano and MEAT-TECH, the event will be the place where Retailers will find the answers they seek, both in the exhibitors' products and in the schedule of events*

Milan, 18 March 2021 - Between openings, variants and ups and downs on vaccine expectations, even the food retail sector, despite its good sales results, is affected by uncertainty that calls for additional attention on the evolution of trends on a broader horizon.

At this time, the role of an event such as TUTTOFOOD becomes even more important. Thanks to the constant dialogue with all the various parties in the supply chain, in just a few editions it has become a reference point in the sector: not only for its ability to **create networking between Italian and international supply and demand**, but also in **anticipating and interpreting trends** to the benefit of such parties. An added value that this year will be emphasised by the **simultaneous presence** of TUTTOFOOD at **Host Milano and MEAT-TECH, at fieramilano from 22 to 26 October**, which will further strengthen synergies with the out-of-home, hospitality and food processing sectors.

Modern distribution: results to strengthen

What is emerging from the trends in demand expressed by consumers? "*In modern distribution – says **Daniele Gilli – Marketing Director of IRI**, a market research company specialised in big data, analytics and insight, and a partner of TUTTOFOOD – Food reached **an 8.4% increase in value and 7.1% in volume** at the end of 2020 also benefiting from a transfer from the out-of-home channel due to the various lockdowns*".

According to IRI data, **Weighted Fresh (+10.6% in value)** and **Chilled foods**, especially **Frozen (+12.9%)**, are the departments with the highest growth rates. **Beverage** results were also definitely positive, although its wholesale channel suffered from the consequences of out-of-home channel closures. In the modern channel these products ended the year with **+5% increase** in spending and **+4.4% of marketed volumes**.

"*In 2020 - says Gilli - food and beverages benefited from a shift in sales from the out-of-home channel due to various closures. In the first months, the hoarding effect drove*



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demand in the stocked categories, but the exceptional pace followed by sales in the first phase of the epidemic was largely caused by the stop in mobility, which shifted consumption normally carried out in bars and restaurants into the home. We estimate that even today about 5.5% of Food & Beverage sales are related to this migration of food consumption".

New generations between phygital and sustainability

But it is not just a matter of shifting figures. The health emergency led to changes in purchasing behaviour, some of them probably permanent. And there are important differences between generations, as shown by the analyses of the **Retail Institute Italy**, the reference association for Retail in Italy: while the **over-65s** discovered online for the first time, **Gen Z and the Millennials** have "explored" new points of sale and new digital purchasing methods.

"We noticed a predisposition of consumers, on the one hand, towards new brands and products, discovered online during the lockdown ," explains **Alberto Miraglia, General Manager of Retail Institute Italy** - "and on the other hand, towards the rediscovery of local shops. The shift to 'phygital' leads to rethinking logistics, while the use of big data and artificial intelligence will enhance the omnichannel experience, creating strong customer relationships. Finally, sustainability is a central theme, also for our Association: we have recently launched the Green Retail Lab project, a permanent laboratory aimed at supporting companies in the sector in implementing a circular economy".

Sustainability is particularly important for **young people (Gen M and Gen Z)**, who are willing to pay more for "eco-friendly" products (according to PwC data, **80% of consumers are willing to spend between 5% and 10% more** for a product with a lower environmental impact).

In the field: Retailers' point of view

While analysts present final data and derive possible trends from it, thanks to their presence in the field, operators have their finger on the pulse of trends as they are unfolding. *"We offer to our consumers six different ways to shop, including delivery and click & collect. - says **Giovanni D'Alessandro, General Manager of BASKO** . As far as physical shops are concerned, the pandemic has accelerated trends that were already ongoing, such as the growth of proximity shops, including innovative formats, and the crisis of large stores."*

Investments in innovation and digital transformation are also confirmed by **Adriano De Zordi, Bennet's CEO**: *"In October 2020, we launched our new e-commerce platform. More specifically, investments in the front end have the goal of better welcome customers by improving the experience in the purchasing and browsing phase".*

But innovation will also concern stores, as well as the digital world, as **Francesco Avanzini, General Manager of Conad**, explains: *"We believe that after the pandemic format evolution that was already underway will resume. Traditional shopping lanes will be replaced by open 'squares' and the different ways of buying and enjoying food and beverages will blur into a continuum ranging from on-site consumption, in-store purchase, click & collect and delivery to digital commerce".*

We have moved from consumer's loyalty for the brand to the brand's loyalty for the consumer, for whom we are making more purchasing channels available" - explains



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Giorgio Santambrogio, Végé Group's CEO. *I call it the 'penta-touch point' model: direct home delivery, click & collect, lockers, dedicated online shopping and food delivery platforms. As far as the point of sale is concerned, we should aim for a multisensory quality experience, complementary to the other channels where more "ordinary" products are favoured".*

Also thanks to synergies with HostMilano and MEAT-TECH, TUTTOFOOD 2021 will give room to these trends both through Italian and international exhibitors and a constantly updated schedule of events. Also **Retail Plaza** will be back where companies in the retail and large-scale retail trade segments will discuss their **best practices** on the latest solutions and trends, talking to the public present. The project will enjoy the partnership with **Retail Institute Italy**, the association of reference for Retail in Italy.

Innovation is in the spotlight with **Evolution Plaza**, the arena for the latest and most up-to-date solutions for digital transformation and the soul of the **TUTTODIGITAL** area, which will introduce initiatives created both by the major companies and innovative start-ups, accompanied by best practices implemented directly by exhibitors.

Together, TUTTOFOOD and HostMilano will also count on the digital resources of the new **Fiera Milano Platform**, an ecosystem of services characterised by wealth of content on websites and social networks, phigital events and a digital map of the exhibition that can enable remote access and direct, real-time negotiations.

TUTTOFOOD will be held at fieramilano from 22 to 26 October 2021, in conjunction with **HostMilano** and **MEAT-TECH**.

For the most up-to-date info: www.tuttofood.it, @TuttoFoodMilano.