

IPACK IMA Business Monitor

Fresh Food

(Meat, Fish, Dairy)

**PRODUZIONE, CONSUMI,
TECNOLOGIE DI PROCESSO
E IMBALLAGGIO**

EDIZIONE 2021



Le dinamiche relative a produzione e consumo di alimentari freschi sotto la lente di questo nuovo Ipack Ima Business Monitor, realizzato in collaborazione con il Centro studi Mec-Ucima, vanno lette dentro la cornice di uno scenario mondiale segnato negli ultimi mesi da una vigorosa ripresa della crescita del Pil e, seppure in minor misura, dell'interscambio mondiale, dopo un 2020 che ha aggravato il rallentamento già parzialmente in atto.

In questo report l'analisi si focalizza sull'arco temporale 2016-2023, con dati consuntivi fino al 2020 e previsioni per gli anni successivi.

La natura anticiclica dei consumi alimentari, la cui persistenza è stata, storicamente, tale da smorzare la crescita nelle fasi di boom e di frenare la caduta della produzione nelle fasi di recessione, va ora combinata con una nuova tendenza restrittiva originata, soprattutto nei Paesi ad alto reddito, dall'emergere di preoccupazioni (e relative politiche pubbliche e innovazioni normative) di maggiore sensibilità ambientale. In Europa, in particolare, la filiera agroalimentare deve affrontare la sfida delle norme volte ad arginare in tempi strettissimi il cambiamento climatico, con la previsione di un appiattimento del trend di crescita, pur sempre in terreno positivo, dopo il boom di inizio Millennio. Tutti questi elementi stanno impattando sul settore agroalimentare a livello globale e si prevede stabilizzeranno il trend di sviluppo nei prossimi anni.

Fresh Food

(Meat, Fish, Dairy)

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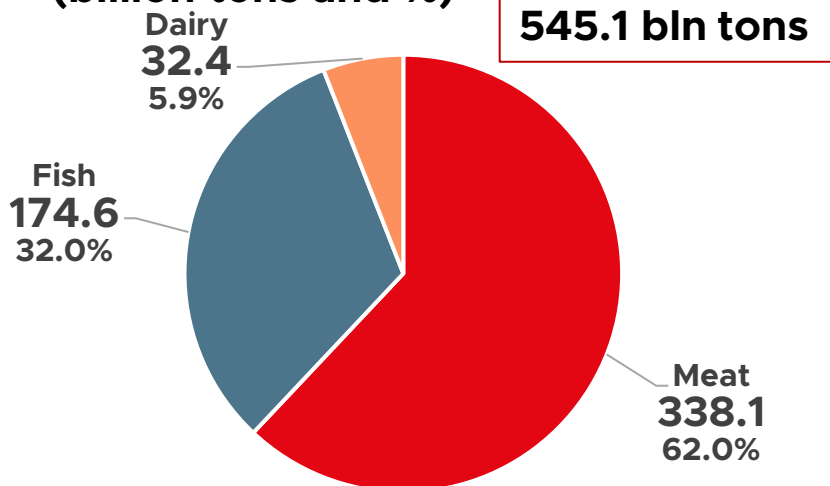
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PRODUZIONE E TRASFORMAZIONE

FRESH FOOD
MEAT, FISH, DAIRY

1.1 QUADRO GENERALE

Total world production of fresh food - primary sector (billion tons and %)

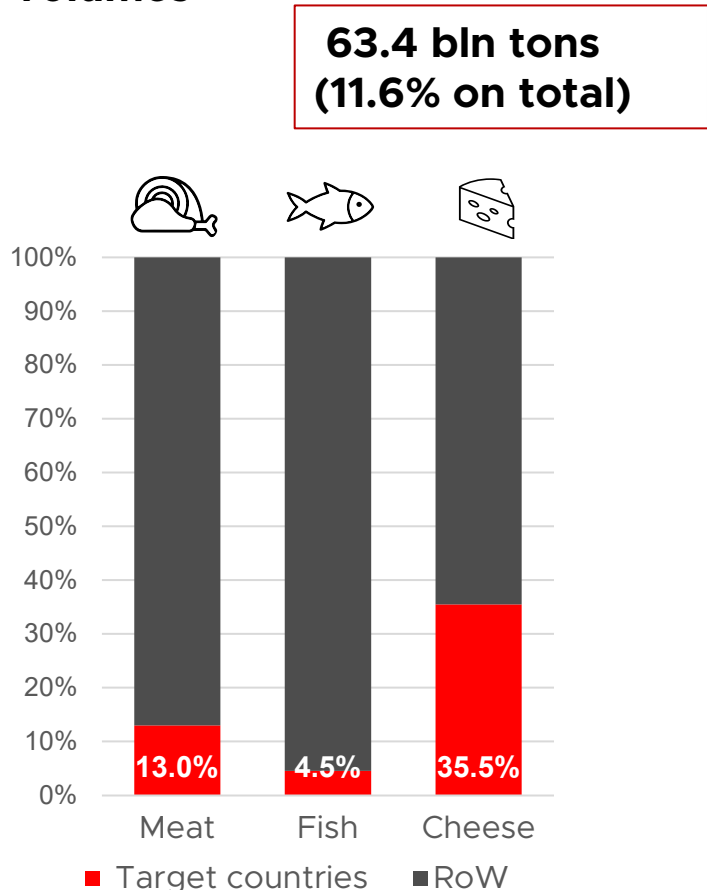


Il mercato del **fresh food** analizzato nelle pagine che seguono - scomposto nei segmenti della carne, del pesce e del caseario - si stima valga oggi complessivamente **all'origine 550 milioni di tonnellate**, a livello mondiale: **338 milioni di tonnellate per il comparto carne**, prevalentemente pollame, suino e bovino; **175 milioni di tonnellate di pesce** tra catture e allevamenti; e **32,4 milioni di tonnellate di formaggi e burro**.

In termini di valore, se dal settore primario ci si sposta alla fase di **trasformazione secondaria** si stima che **tra carni, pesce e latticini** si arrivi a livello mondiale a **quasi mille miliardi di euro di valore alla produzione** (937 miliardi per la precisione).

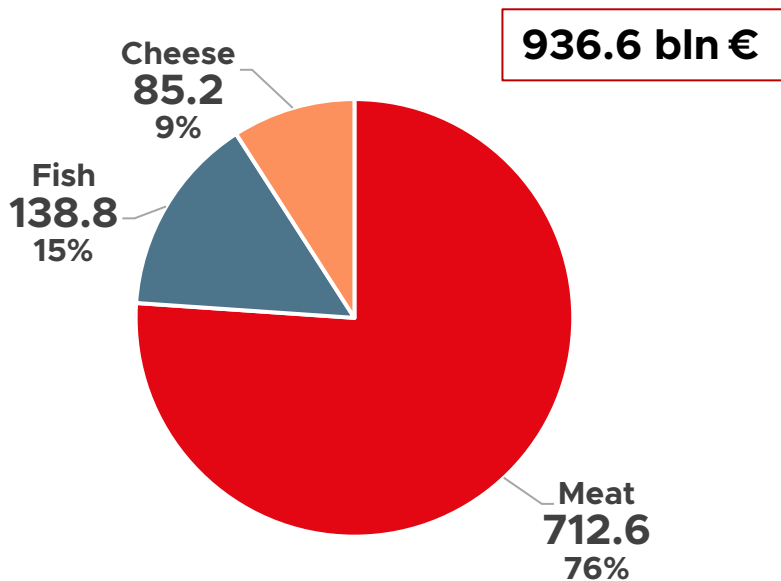
Il food processing cresce a ritmo più sostenuto rispetto alla dinamica evidenziata nel settore primario, rimasto pressoché stabile dal 2016 a oggi, e continuerà a svilupparsi nei prossimi anni: si prevede un tasso medio annuo di incremento (CAGR) **superiore al 6% l'anno per carni lavorate e formaggi** da qui al 2023, a fronte di un +2,5% di crescita media stimata per l'industria del pesce.

Target countries shares on total volumes



Source: elaboration on data World Bank

Total world production of processed fresh food (billion euro and %)



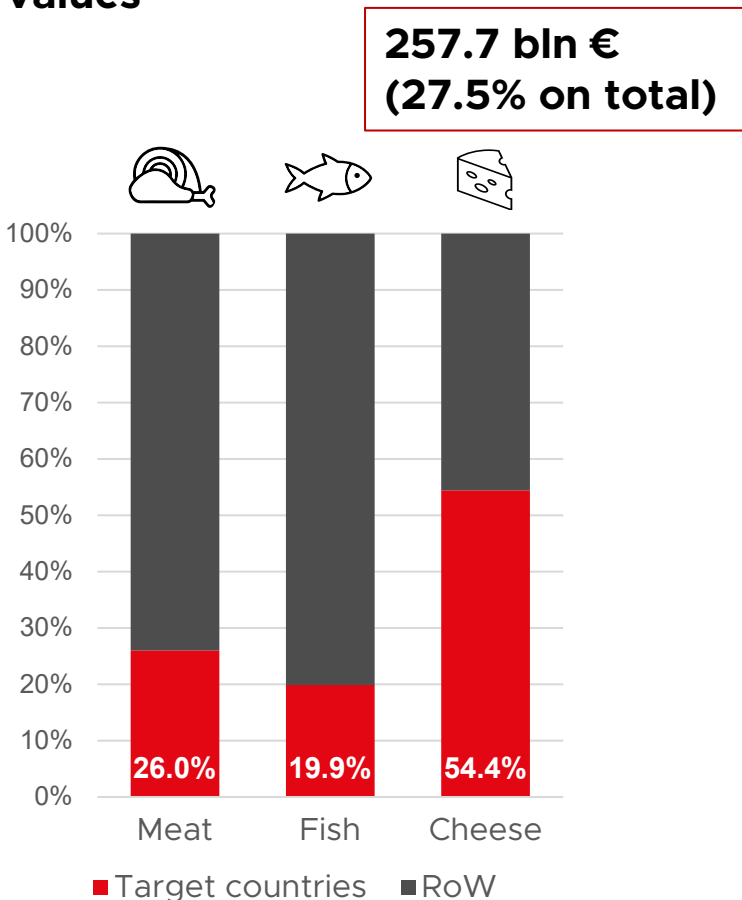
Il **segmento carne** è in assoluto il più rilevante all'interno della "famiglia" del fresh food in esame: **pesa** il 62% in termini di volumi sulla produzione totale e **il 76% sul totale della trasformazione**, con un valore di **oltre 700 miliardi di euro di carne processata su scala globale**.

Il **pesce**, che incide per circa un terzo dei volumi di proteine animali immesse ogni anno (tra pesca e acquacoltura) sul mercato mondiale, ha invece un minor peso nella fase della trasformazione: **il pesce processato vale oggi circa 140 miliardi di euro** ed evidenzia un trend di sviluppo molto più costante nel tempo (con un **CAGR medio del 2,5%**).

La produzione di **dairy solido** (burro e formaggi) copre la quota restante del mercato, con una **incidenza inferiore al 10% sia in termini di volumi sia di valore creato nella fase di processing** ed è anche il segmento del fresh food che si è dimostrato più resiliente negli ultimi anni e con le migliori prospettive di sviluppo.

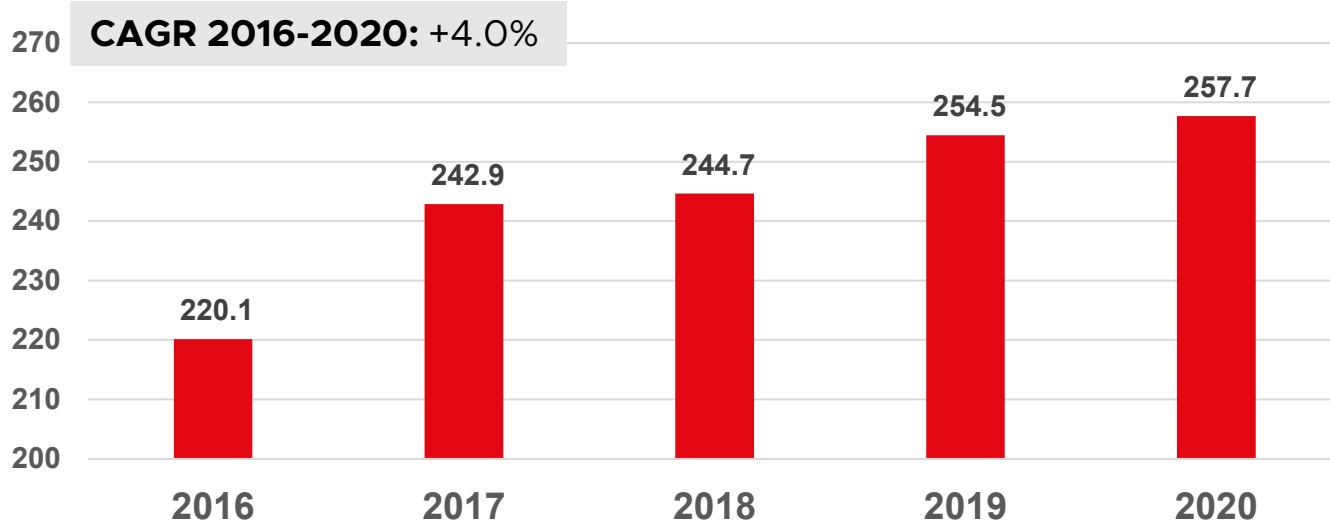
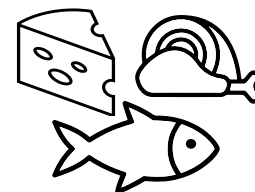
Il dairy solido è anche il segmento di specializzazione dei 23 Paesi analizzati in questo Ipack-Ima Business Monitor, rilevanti sia per volumi prodotti sia per industria di trasformazione: la popolosissima area asiatica, Cina in particolare, accentra infatti circa la metà della produzione e dei consumi mondiali di carne e pesce, mentre ha un ruolo marginale nel settore lattiero-caseario, che non appartiene alla cultura alimentare del Far East.

Target countries shares on total values



Source: elaboration on data FAO

Trend 2016-2020 of processed fresh food in target countries (values in billion euro)



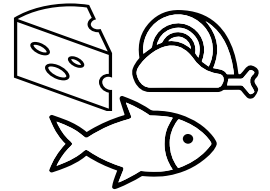
Processed fresh food production in target countries (values in million euro)

	2020
Germany	50,605
France	40,613
Spain	32,769
Italy	29,247
Great Britain	28,018
Poland	22,243
Ireland	13,268
Switzerland	7,354
Austria	5,596
Portugal	4,314
Egypt	3,825
Morocco	3,680
Romania	3,541
Czech Republic	3,392
Hungary	2,875
Serbia	1,780
Bulgaria	1,707
Croatia	1,076
Slovenia	831
Bosnia	529
Albania	270
Macedonia	100
Montenegro	36
TOTALE	257,669

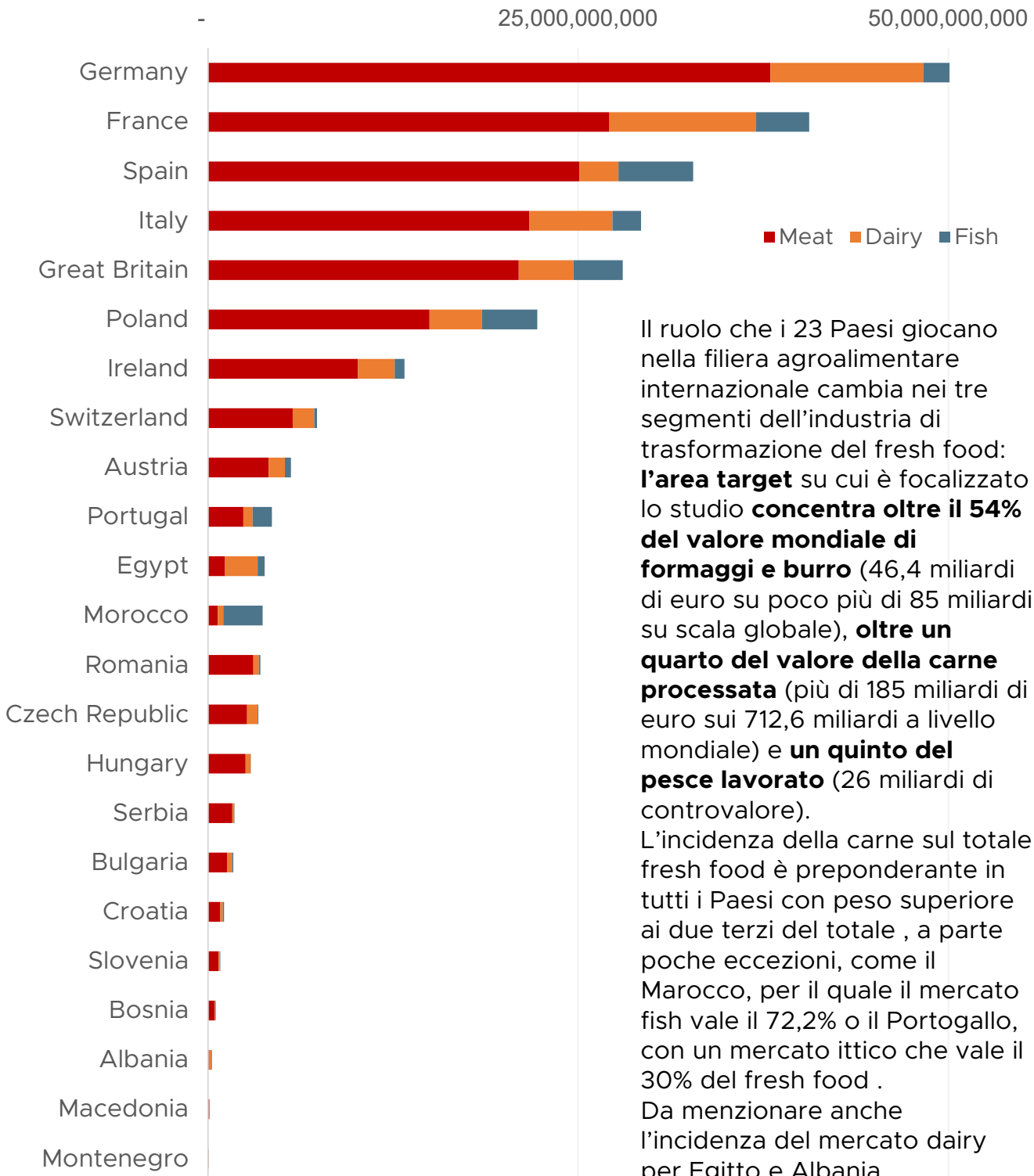
Source: elaboration on data Eurostat

Nei 23 mercati del bacino europeo e mediterraneo, mercati target per le tecnologie di food processing & packaging, **il mercato del fresh-food vale oltre 62 milioni di tonnellate di produzione in quantità** - tra carne, pesce e caseario - **e quasi 258 miliardi di euro in termini** di valore generato dall'industria di trasformazione, pari a circa il 28% del totale mondiale.

Negli ultimi cinque anni la dinamica è stata molto vivace per l'industria casearia, che ha messo a segno una crescita media annua del 6,3% nei 23 Paesi, e ancor di più per la trasformazione ittica, che ha aumentato il giro d'affari al ritmo del 6,8% annuo, contro il +2,2% di CAGR del meat processing.



Processed fresh food in target countries (values in euro)

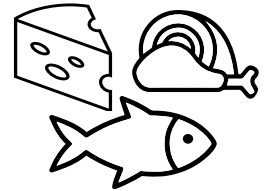


Il ruolo che i 23 Paesi giocano nella filiera agroalimentare internazionale cambia nei tre segmenti dell'industria di trasformazione del fresh food: **l'area target** su cui è focalizzato lo studio **concentra oltre il 54% del valore mondiale di formaggi e burro** (46,4 miliardi di euro su poco più di 85 miliardi su scala globale), **oltre un quarto del valore della carne processata** (più di 185 miliardi di euro sui 712,6 miliardi a livello mondiale) e **un quinto del pesce lavorato** (26 miliardi di controvalore).

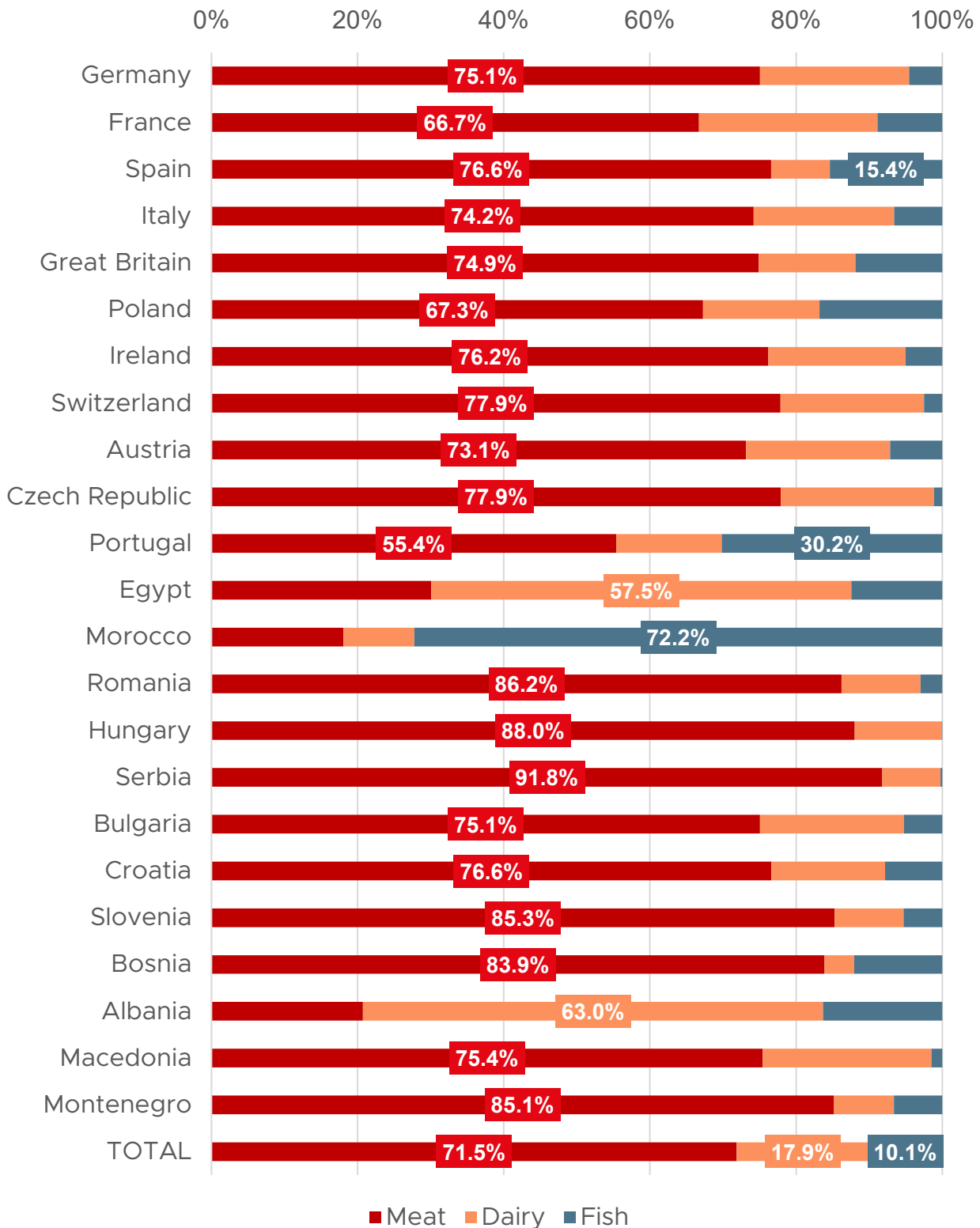
L'incidenza della carne sul totale fresh food è preponderante in tutti i Paesi con peso superiore ai due terzi del totale, a parte poche eccezioni, come il Marocco, per il quale il mercato fish vale il 72,2% o il Portogallo, con un mercato ittico che vale il 30% del fresh food.

Da menzionare anche l'incidenza del mercato dairy per Egitto e Albania, rispettivamente del 57,5% e 63%.

Source: elaboration on data Eurostat



Processed fresh food in target countries (shares of meat, fish, dairy)



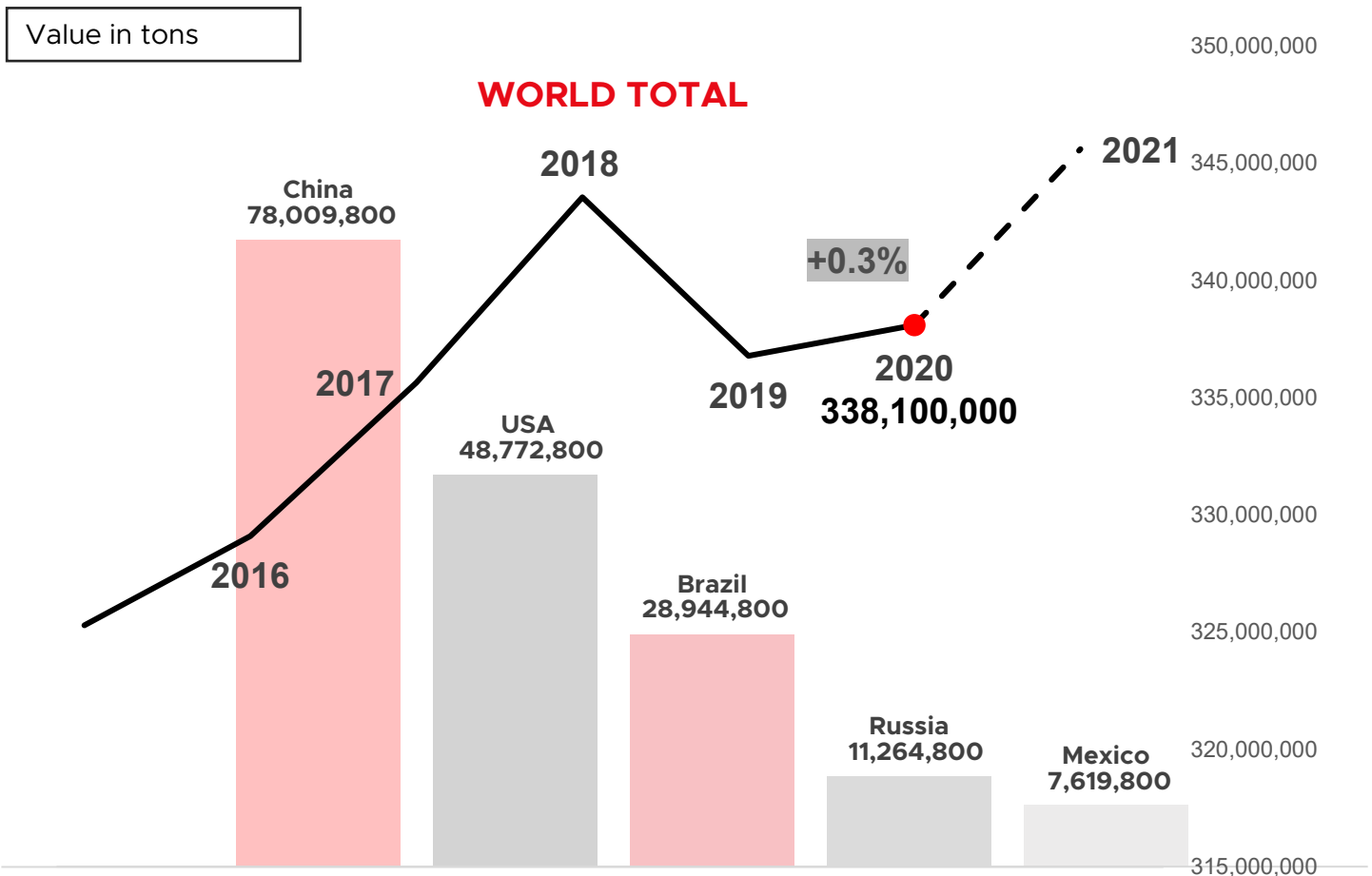
Source: elaboration on data Eurostat

1.2 PRODUZIONE DI CARNE

SETTORE PRIMARIO



Total world production trend 2016-2021 and main producer countries



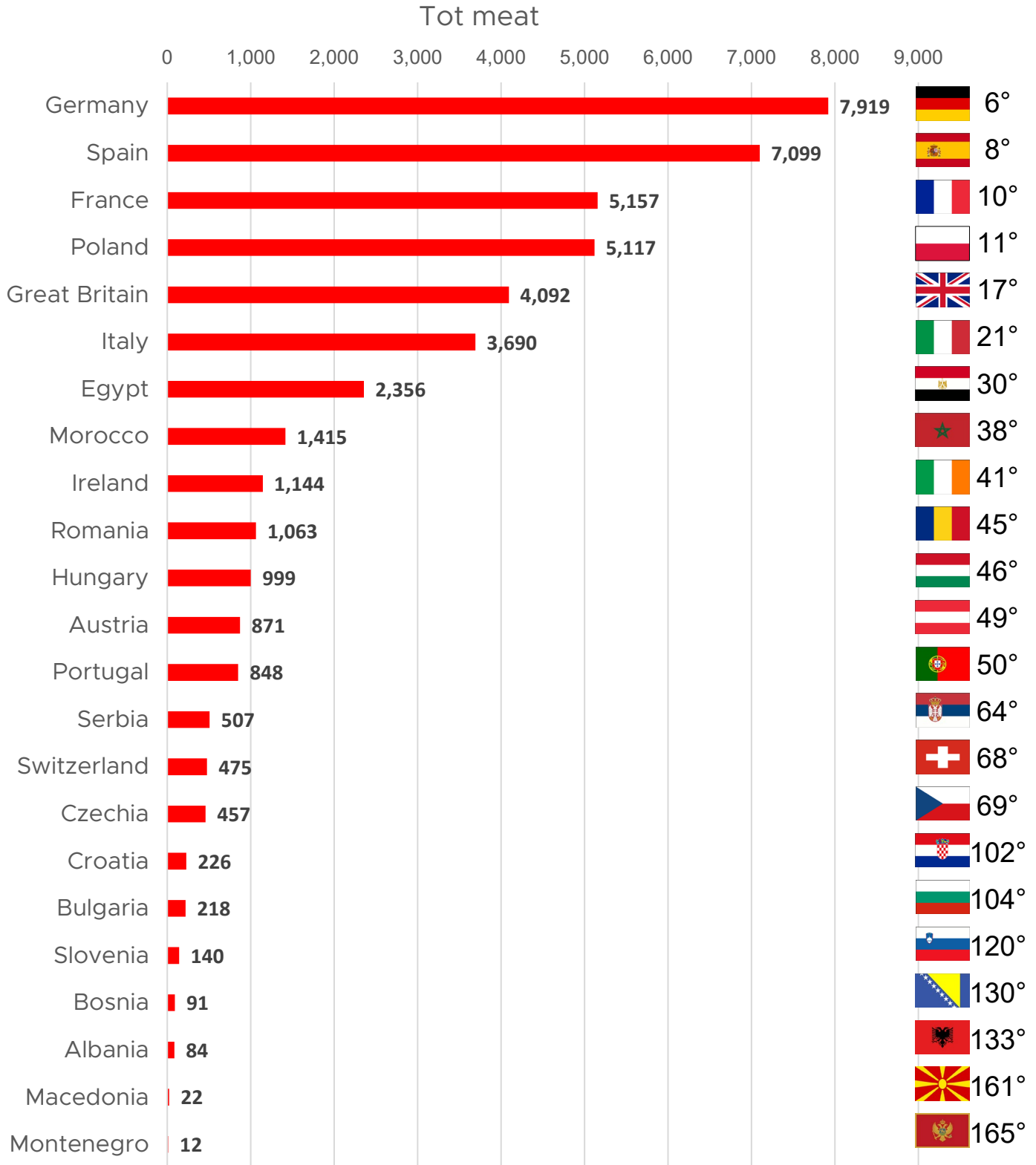
Source: elaboration on data FAO

Il 2020 si è chiuso meglio del previsto per il settore delle carni, nonostante i prezzi e i flussi import-export siano comunque diminuiti a causa degli ostacoli logistici indotti e della riduzione della spesa delle famiglie a basso reddito, che hanno optato per alternative proteiche più economiche.

La produzione totale di carne nel settore primario **si è mantenuta pressoché stabile**, con un lieve **aumento per le carni bianche**, tanto da far chiudere l'intero comparto a **+0,3% a livello mondiale nel 2020**, con la previsione di un **recupero nel 2021** con un aumento dei volumi **del +2,2%**. A bilanciare i segni meno dei Paesi occidentali è stata la **Cina, primo produttore e consumatore mondiale**, che ha aumentato notevolmente le importazioni a causa dell'epidemia di peste suina negli allevamenti locali. L'Outlook di OCSE e FAO prevede che l'offerta globale di carne si espanderà ulteriormente dal 2021 in avanti, per raggiungere i 374 milioni di tonnellate entro il 2030 (contro i 338 milioni di tonnellate 2020, sempre nel settore primario), con un trend stabile in Europa e vivace in **Usa e Brasile**, che insieme alla **Cina**, garantiscono quasi la metà (45,9%) della carne prodotta nel mondo.



Total meat production (.000 tons) and ranking among world meat producer countries

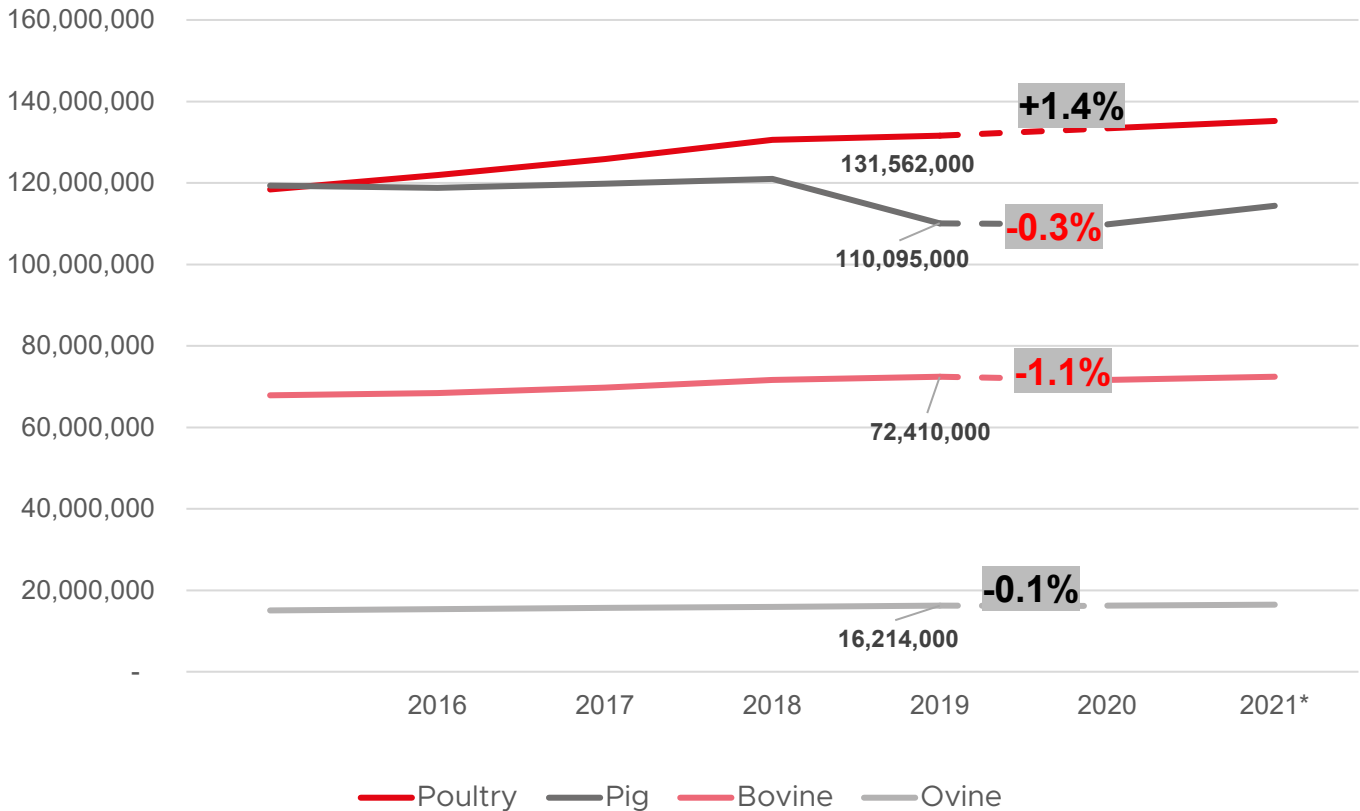


Ranking of 193 countries

Source: elaboration on data FAO



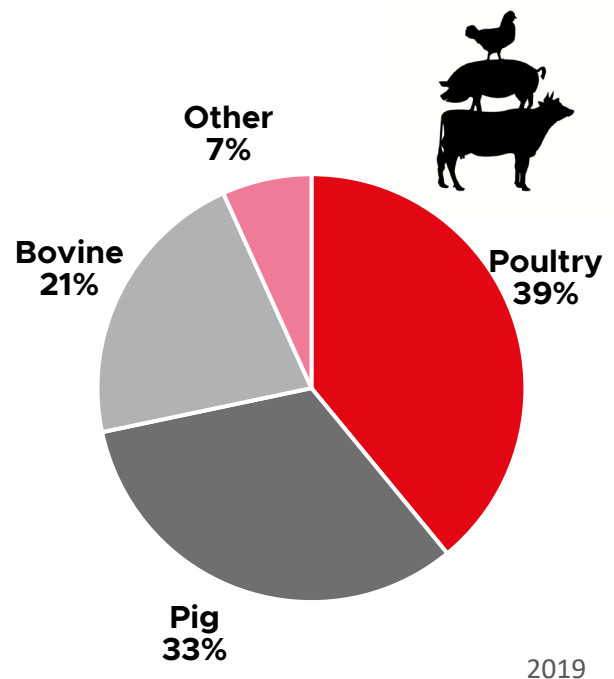
Meat production by type: trend 2016-2021 (in tons)



Source: elaboration on data FAO

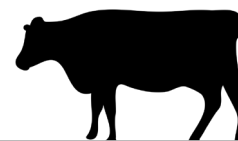
Entrando nel dettaglio delle diverse tipologie di carne prodotte in volumi, emerge come sia il pollame la prima varietà a livello mondiale (39% del totale), seguita dai suini (33%) e bovini (21%), mentre nei 23 Paesi target di questo studio è la **produzione di carne suina** a dominare (**45% del totale**) rispetto alla produzione di pollame (36%) e di bovini (19%).

Il 2020 consolida su scala internazionale l'allargarsi della forbice fra la produzione di pollame, cresciuta a un ritmo del 2,4% annuo dal 2016, e quella di carne suina, che nello stesso periodo si è contratta dell'1,8% annuo (complice l'epidemia di peste suina cinese).





Meat production (.000 tons) by type and ranking among world meat producer countries



RANK	Poultry	*000 tons	RANK	Pig	*000 tons	RANK	Bovine	*000 tons
8	Poland	2,558.1	3	Germany	5,232.0	10	France	1,428.5
13	Great Britain	1,901.6	4	Spain	4,641.2	12	Germany	1,107.0
20	France	1,659.5	8	France	2,200.4	16	Great Britain	914.0
21	Spain	1,630.6	10	Poland	1,988.8	17	Italy	801.1
22	Germany	1,543.9	15	Italy	1,464.5	19	Egypt	746.8
26	Egypt	1,454.9	20	Great Britain	960.0	20	Spain	695.2
28	Italy	1,357.9	25	Austria	502.0	22	Ireland	619.8
33	Morocco	860.5	26	Hungary	462.1	24	Poland	560.5
37	Hungary	531.7	29	Romania	398.7	44	Morocco	283.0
38	Romania	507.1	30	Portugal	387.9	50	Austria	229.6
44	Portugal	350.3	34	Ireland	304.4	62	Switzerland	145.7
59	Czech Rep.	169.9	36	Serbia	301.6	73	Romania	101.8
62	Ireland	154.0	43	Switzerland	220.9	78	Portugal	92.0
69	Austria	131.7	44	Czech Rep.	218.6	85	Czech Rep.	74.5
75	Bulgaria	109.0	51	Croatia	120.8	90	Serbia	65.0
78	Serbia	104.3	60	Bulgaria	81.6	101	Croatia	45.4
81	Switzerland	98.6	76	Slovenia	32.2	106	Albania	36.7
92	Slovenia	70.0	93	Macedonia	13.4	107	Slovenia	35.7
93	Bosnia	69.5	100	Albania	10.2	113	Hungary	30.8
101	Croatia	53.9	106	Bosnia	7.7	124	Bulgaria	17.8
137	Albania	11.6	118	Montenegro	2.8	132	Bosnia	11.9
158	Montenegro	3.8	146	Egypt	0.7	149	Macedonia	4.1
164	Macedonia	1.5	148	Morocco	0.6	151	Montenegro	3.8
Target countries		15,333.9	Target countries		19,553.1	Target countries		8,050.7
World		131,647.2	World		110,109.9	World		72,604.1

Ranking of 193 countries

Ranking of 172 countries

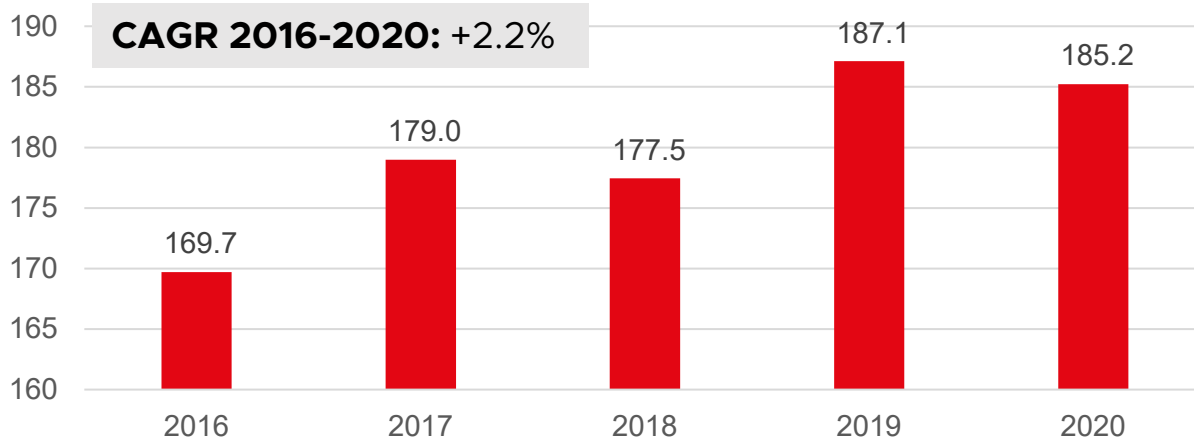
Ranking of 192 countries

Germania, Spagna e Francia sono nella top ten mondiale come dei produttori di carne, in particolare la **Germania** è il terzo player internazionale nel segmento della carne suina, dopo Cina e Usa, la Spagna il quarto. Nel segmento della carne bovina il primo Paese – tra quelli target – è la **Francia**, decimo produttore mondiale per dimensioni. Mentre la **Polonia** è l'ottavo produttore globale di pollame e il decimo di maiale. Si tratta di produzioni di qualità ad alto valore aggiunto - in tutto i 23 Paesi target producono 44 milioni di tonnellate complessive - che si confrontano però con altri ordini di grandezza in Cina, che da sola produce 78 milioni di tonnellate di carne l'anno, seguita da Stati Uniti (48,8 milioni) e Brasile (12,5 milioni di tonnellate).



SETTORE SECONDARIO

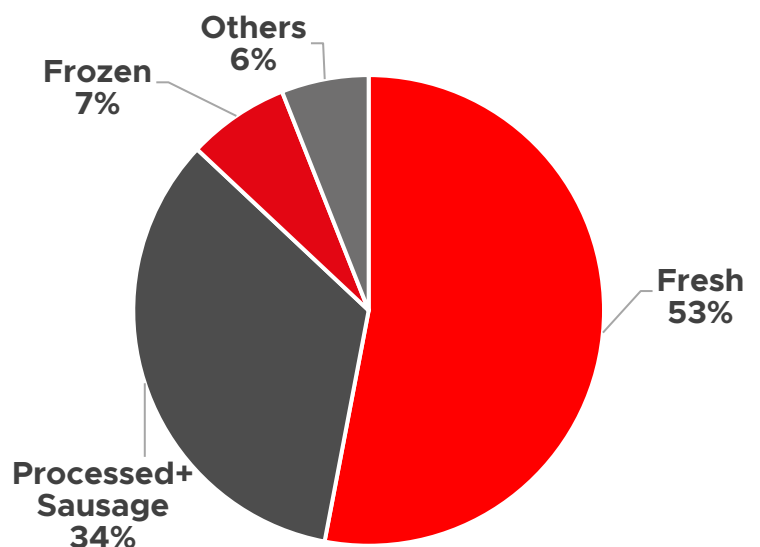
Processed meat trend 2016-2020 in target countries (values in billion euro)



Processed meat production in target countries (values in million euro)

2020	
Germany	37,991
France	27,091
Spain	25,090
Italy	21,695
Great Britain	20,986
Poland	14,961
Ireland	10,112
Switzerland	5,725
Austria	4,093
Romania	3,052
Czech Rep.	2,643
Hungary	2,530
Portugal	2,389
Serbia	1,634
Bulgaria	1,281
Egypt	1,151
Croatia	825
Slovenia	709
Morocco	665
Bosnia	444
Macedonia	75
Albania	56
Montenegro	31
TOTALE	185,230

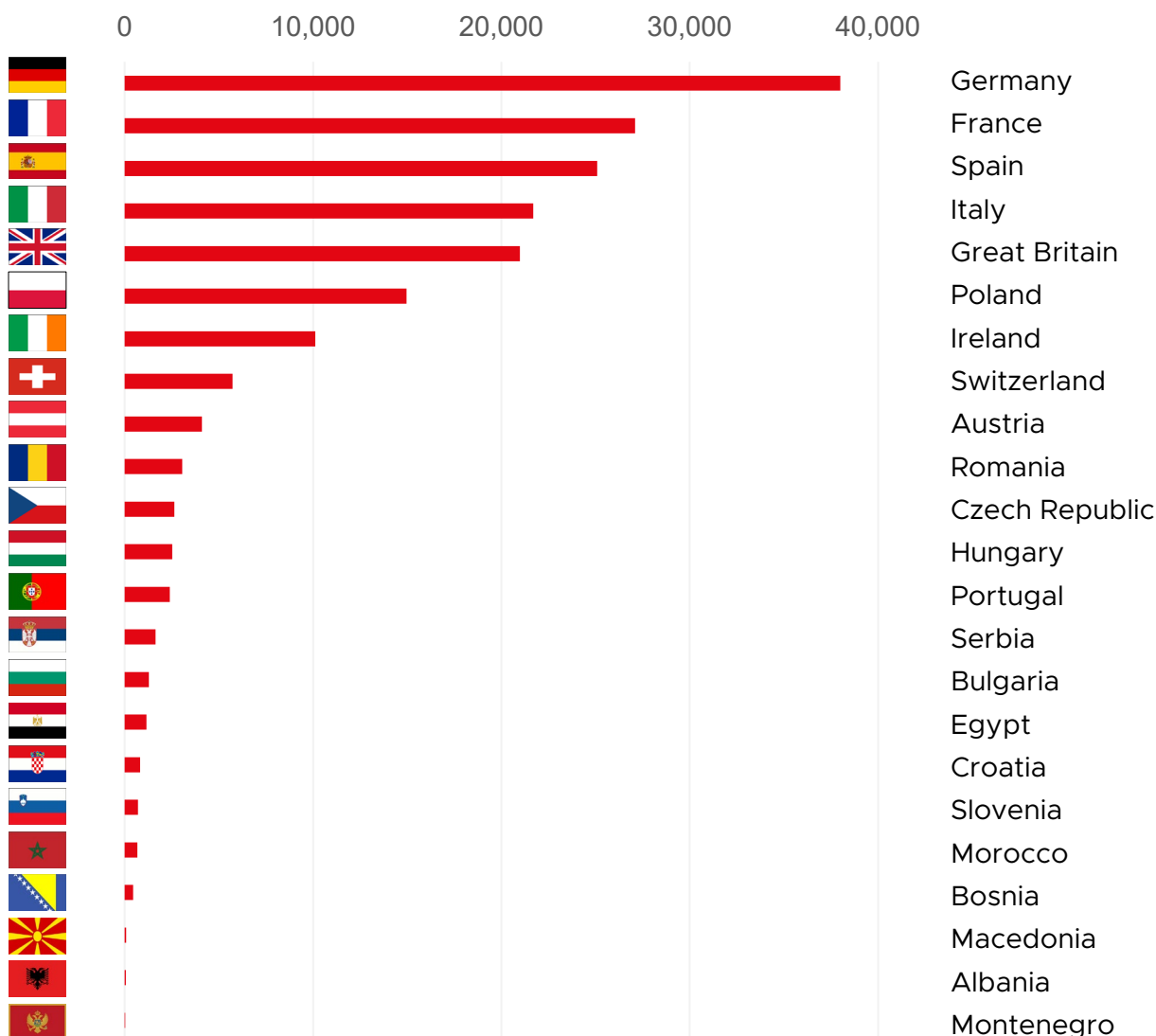
La Germania, con 38 miliardi di euro di valore creato dall'industria di trasformazione delle carni, si conferma uno dei principali player internazionali e accentra più del 20% del valore generato complessivamente dai 23 Paesi analizzati, seguita da **Francia (27 miliardi di euro)**, **Spagna (25 miliardi)**, **Italia (21,7 miliardi)** e **Gran Bretagna (21 miliardi)**.



Source: elaboration on data Eurostat



Processed meat production in target countries (values in million euro)

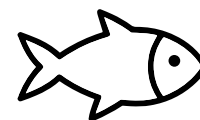


I cinque Paesi rappresentano assieme oltre il 70% della filiera di trasformazione delle carni nell’area target. Il lavorato fresco pesa oltre il 50% della produzione trasformata, contro un 34% di salsicce, wurstel, prosciutti, mentre i surgelati rappresentano una quota minoritaria, il 7% in valore. La filiera della trasformazione delle carni esce da un buon quinquennio di crescita (+2,2% l’anno), che ha portato il mercato dai 170 miliardi del 2016 ai 185 miliardi di euro in valore del 2020, con una leggera frenata solo nel 2020 (-1%).

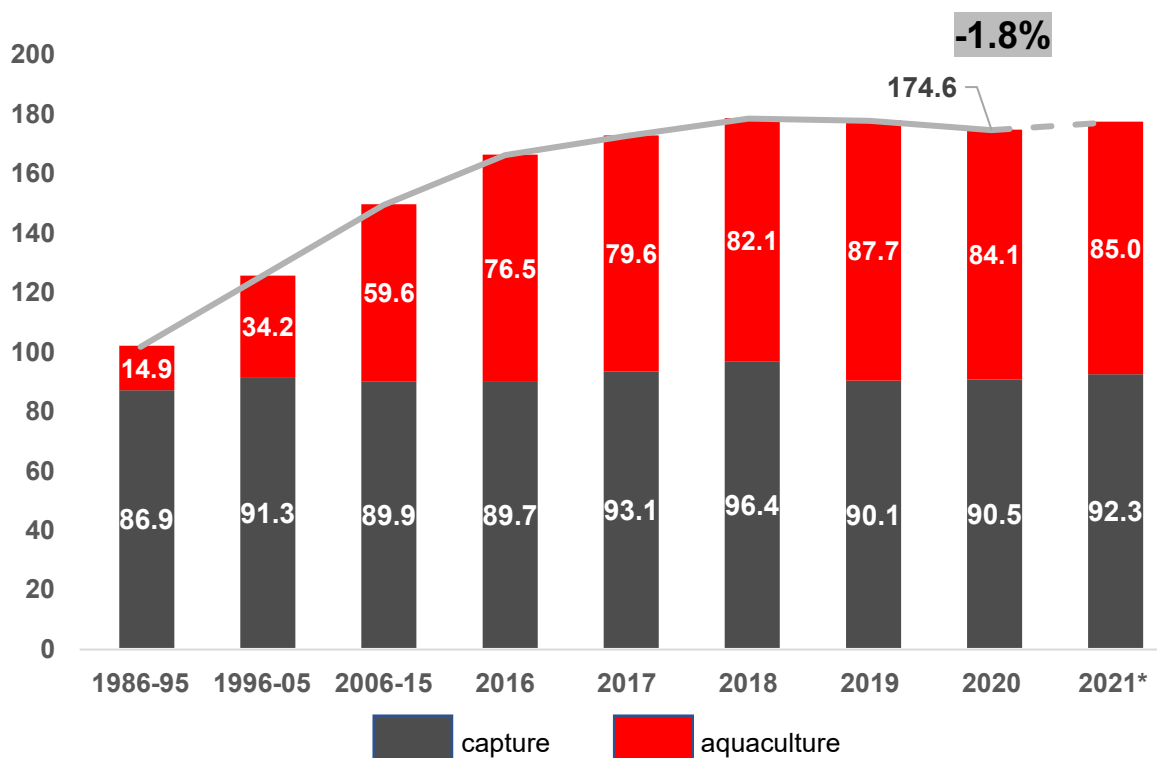
Source: elaboration on data Eurostat

1.3 PRODUZIONE DI PESCE

SETTORE PRIMARIO



Trend of capture and aquaculture in the world (million tons.)

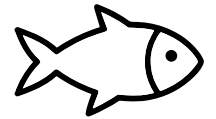


Source: elaboration on data FAO

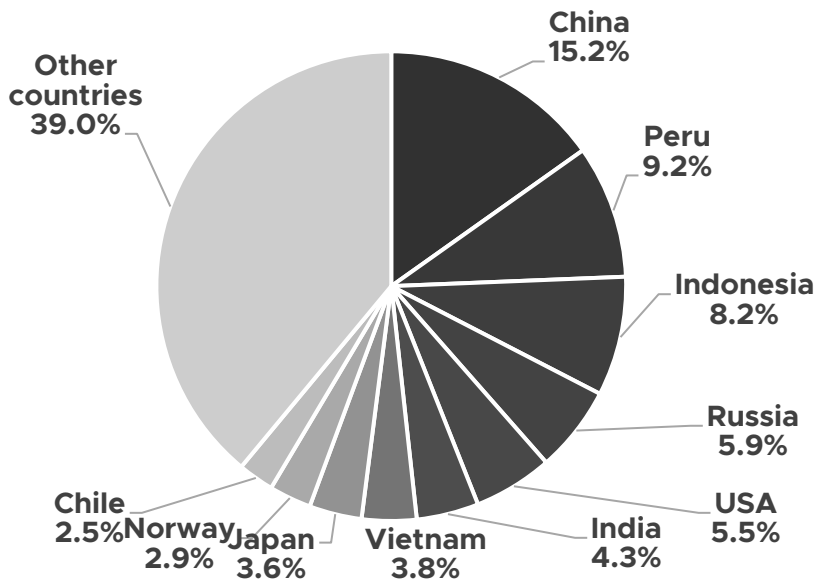
La produzione mondiale di pesce (rappresentata da pesca e acquacultura) ha segnato per la prima volta nel 2020 una battuta d'arresto, con una flessione dell'**1,8%** rispetto ai 175 milioni di tonnellate dell'anno prima.

Il 48% proviene da acquacultura, il 52% dalla pesca (catture in mare per l'87,6%, in acque interne per il restante 12,4%). Il ruolo chiave lo gioca (come si è visto già nel settore carne) la Cina, primo produttore, esportatore e consumatore di pesce.

La buona notizia è che si sta preparando un decennio di ripresa, con **una crescita media annua al 2030 dell'1,2%**, più contenuta rispetto al +2,1% del decennio precedente, che porterà la produzione mondiale a 201 milioni di tonnellate.



Main fish world producer countries: Shares of capture



Pesca

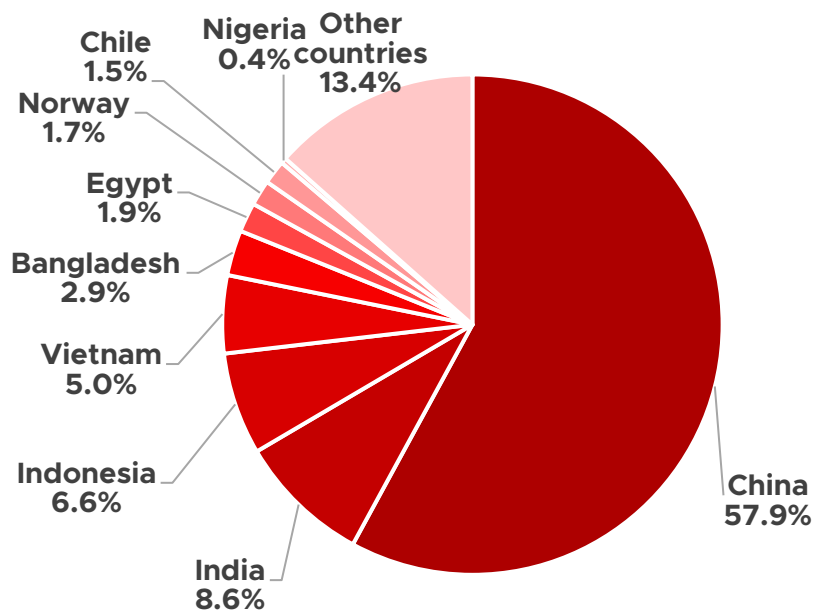
La Cina è il principale Paese per volumi di pescato (15,2%), seguita da Perù e Indonesia, sia che si tratti di pesca in mare (15%) sia in acque interne (16%). Nella pesca in bacini interni dopo la Cina si piazzano India e Bangladesh.

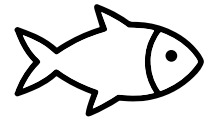
Main fish world producer countries: Share of aquaculture



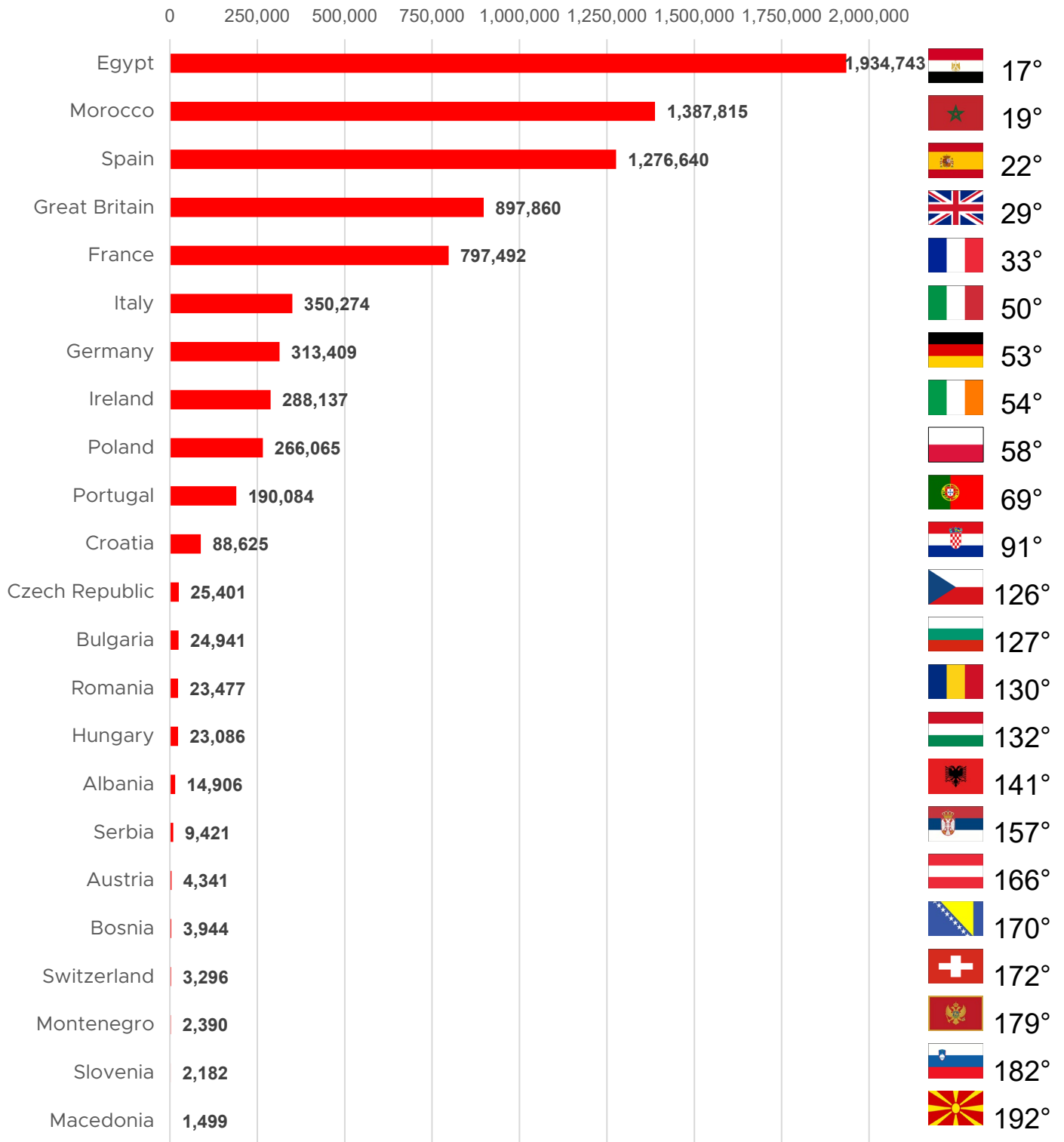
Acquacoltura

In Cina si trova oltre la metà (57,9%) dei volumi complessivi di pesci allevati. Seguono come Paesi produttori India e Indonesia.





Total fish production (in tons) and ranking among world fish producer countries



Ranking of 208 countries

Source: elaboration on data FAO



Capture and aquaculture (in tons) and ranking among world fish producer countries in target countries



Rank	Capture	Tons
17°	Morocco	1,386,548
21°	Spain	928,815
28°	Great Britain	700,242
31°	France	611,842
45°	Egypt	373,286
52°	Germany	279,213
54°	Ireland	251,241
58°	Poland	222,704
63°	Italy	206,936
67°	Portugal	178,270
93°	Croatia	70,557
141°	Romania	11,179
147°	Albania	8,648
148°	Bulgaria	8,599
151°	Hungary	5,234
155°	Czech Republic	3,650
168°	Serbia	2,082
178°	Switzerland	1,553
181°	Montenegro	1,293
195°	Austria	350
196°	Bosnia	305
198°	Slovenia	264
201°	Macedonia	140
Total 23 countries		5,252,952
World		90,483,086

Ranking of 208 countries



Rank	Aquaculture	Tons
8°	Egypt	1,561,457
20°	Spain	347,825
26°	Great Britain	197,618
28°	France	185,650
30°	Italy	143,338
45°	Poland	43,361
46°	Ireland	36,896
48°	Germany	34,196
57°	Czech Republic	21,751
61°	Croatia	18,067
62°	Hungary	17,852
66°	Bulgaria	16,342
71°	Romania	12,298
72°	Portugal	11,814
85°	Serbia	7,339
86°	Albania	6,258
95°	Austria	3,991
99°	Bosnia	3,639
112°	Slovenia	1,919
114°	Switzerland	1,743
121°	Macedonia	1,359
123°	Morocco	1,267
126°	Montenegro	1,097
Total 23 countries		2,677,077
World		84,124,179

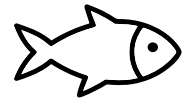
Ranking of 186 countries

I 23 Paesi target di questo Monitor producono complessivamente quasi 8 milioni di tonnellate di pesce l'anno, tra cattura e acquacoltura, il 4,5% del totale mondiale.

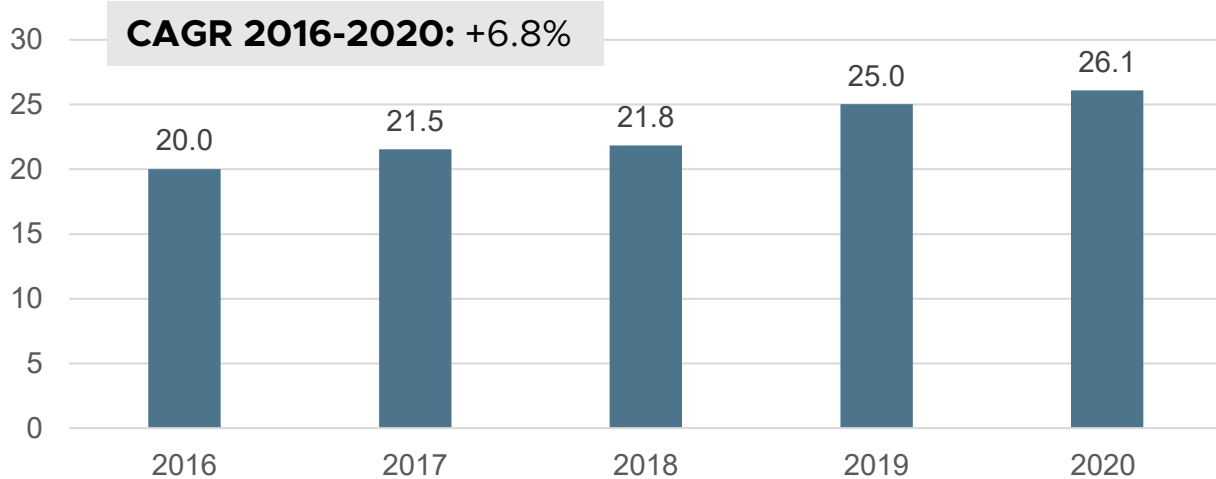
L'Egitto, con quasi 2 milioni di tonnellate di pesce immesso sul mercato, **è al 17° posto nella graduatoria internazionale**, dominata dai Paesi del Far East assieme a Perù, Usa e Russia, ma sale all'ottavo posto nell'acquacoltura (dati Fao 2019, ultimo anno disponibile con dettagli nazionali). Anche **Marocco** e **Spagna** rientrano nella top 20 dei produttori mondiali. La Cina resta il principale attore nel settore della pesca, non solo in termini di catture in mare e in acque interne, ma ancor più quando si parla di acquacoltura: l'industria cinese accentra il 58% circa della produzione mondiale.

Source: elaboration on data FAO

SETTORE SECONDARIO



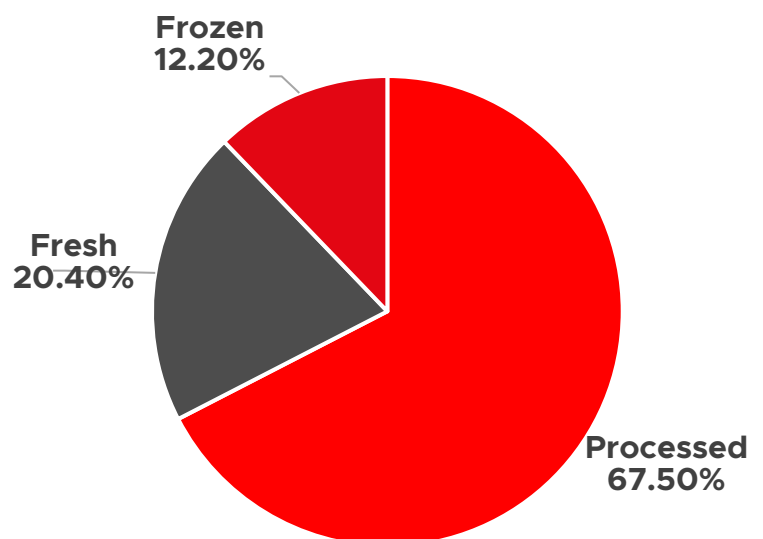
Processed fish trend 2016-2020 in target countries (values in billion euro)



Processed fish production in target countries (values in million euro)

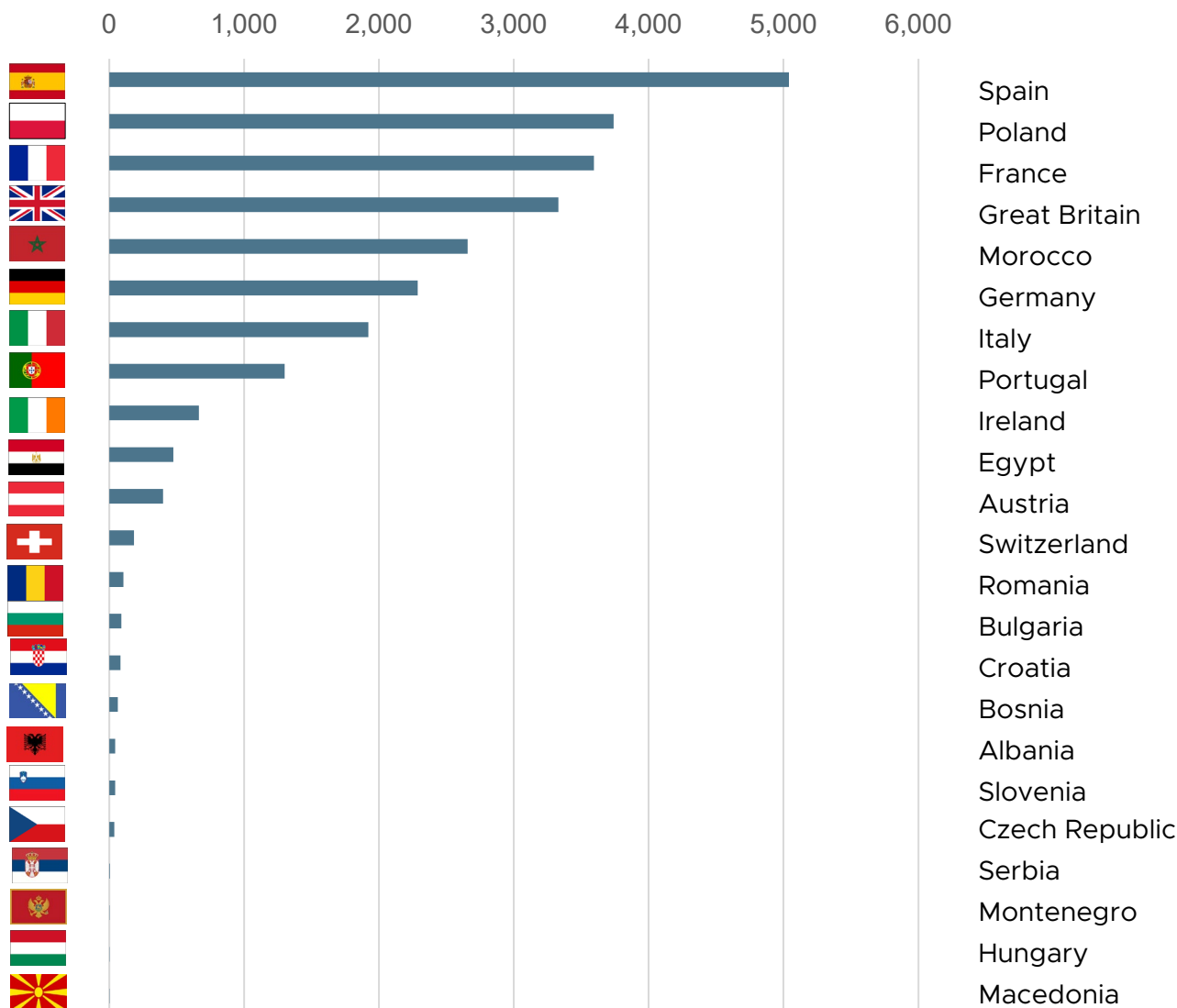
	2020
Spain	5,041
Poland	3,740
France	3,595
Great Britain	3,331
Morocco	2,658
Germany	2,288
Italy	1,921
Portugal	1,302
Ireland	664
Egypt	476
Austria	400
Switzerland	184
Romania	106
Bulgaria	89
Croatia	84
Bosnia	64
Albania	44
Slovenia	44
Czech Rep.	38
Serbia	4
Montenegro	2
Hungary	2
Macedonia	1
TOTALE	26,080

Se invece si sposta il focus sul fish processing, è la **Spagna al primo posto come trasformatore europeo** di pesce e uno dei principali al mondo, con un **valore della produzione superiore ai 5 miliardi di euro**. **Polonia, Francia e Gran Bretagna** seguono con valori della filiera di lavorazione industriale superiori ai 3 miliardi di euro in ogni mercato.



Source: elaboration on data Eurostat

Processed fish production in target countries (values in million euro)

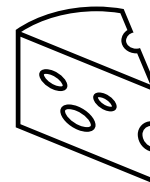


Se poi a questi primi quattro Paesi si sommano i valori prodotti dalle imprese di trasformazione marocchine (2,7 miliardi), tedesche (2,3 miliardi) e italiane (1,9 miliardi) si arriva a quasi il 90% del valore totale generato dalla **filiera industriale nell'area target**: in tutto **26 miliardi di euro**.

Di questo totale, **il pesce processato**, soprattutto salmone affumicato e tonno in scatola, **rappresenta i due terzi** di questa somma, seguito dal lavorato fresco - che incide per oltre il 20% - e dal pesce surgelato.

L'industria del pesce trasformato non ha mai invertito il cammino di crescita intrapreso nel quinquennio precedente, neppure a causa dell'emergenza sanitaria, come è invece accaduto nel settore primario (cattura e acquacoltura) e **ha chiuso il 2020 con un incremento del 4,2%**, dopo aver inanellato nel periodo 2016-20 un CAGR medio del +6,8%.

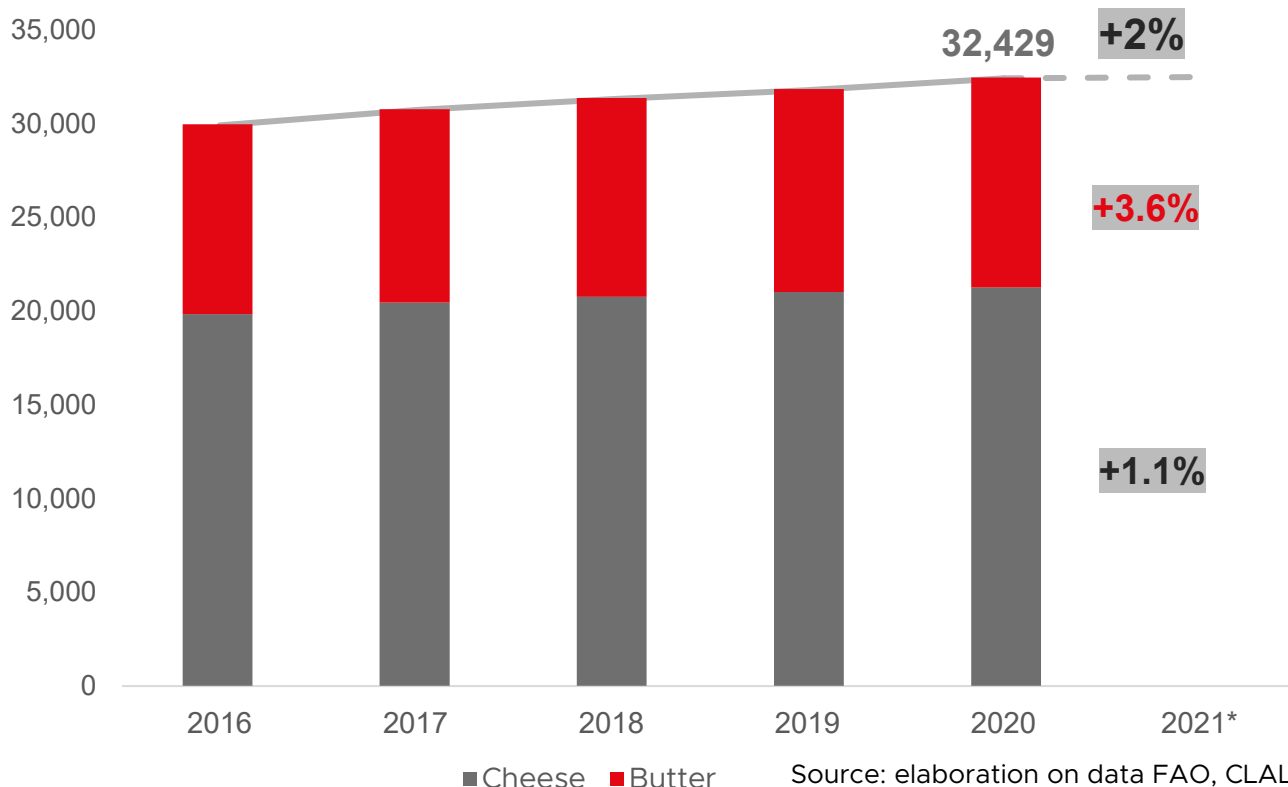
Source: elaboration on data Eurostat



1.4 PRODUZIONE DAIRY

SETTORE PRIMARIO

Trend 2016-2021 of production of solid dairy product in the world (in 000. tons)

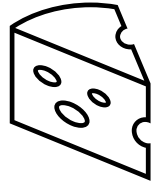


Continua ininterrottamente a crescere la produzione di **alimenti dairy solidi** (esclusi quindi latte e yogurt) superando, su scala mondiale, nel 2020, i **32,4 milioni di tonnellate, in crescita del 2%** rispetto all'anno precedente. In particolare, **il formaggio** con 21,2 milioni di tonnellate **è responsabile dei due terzi della produzione globale** (66,2%), mentre il burro occupa il restante terzo con 11,2 milioni di tonnellate, **ed è il segmento più dinamico evidenziando una crescita del +3,6%** nel 2020 rispetto al 2019), mentre il segmento formaggio ha limitato la corsa a +1,1%.

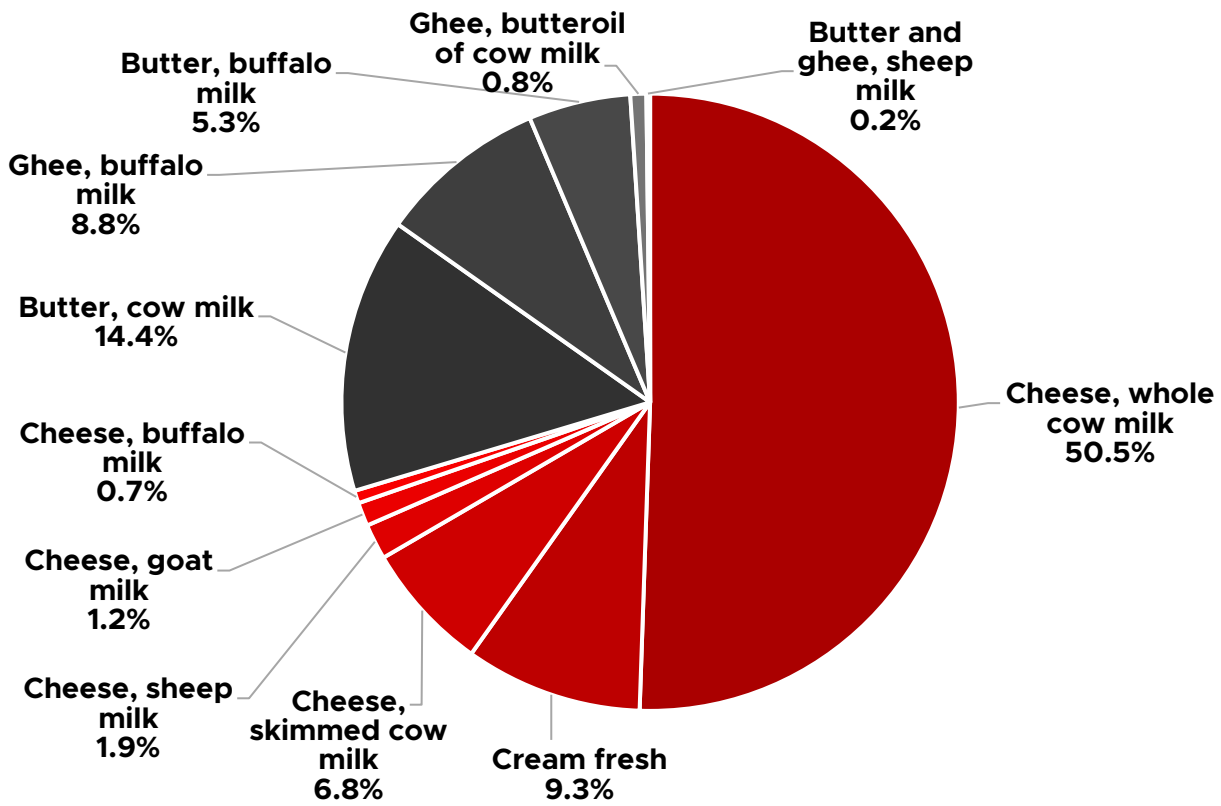
Tra le diverse tipologie di dairy, **metà (50,5%) dei volumi complessivi corrisponde a derivati di latte vaccino**. Seguono il burro (sempre con latte vaccino) con il 14,4% del totale, fresh cream (9,3%) e il ghee (burro chiarificato) prodotto con latte di bufala (8,8%).

E **da qui al 2030** i produttori di lattiero-caseario **continueranno a incrementare la produzione** a un trend stimato da Fao attorno all'1,7% l'anno, anche se a beneficiarne sarà soprattutto il consumo di latte fresco.

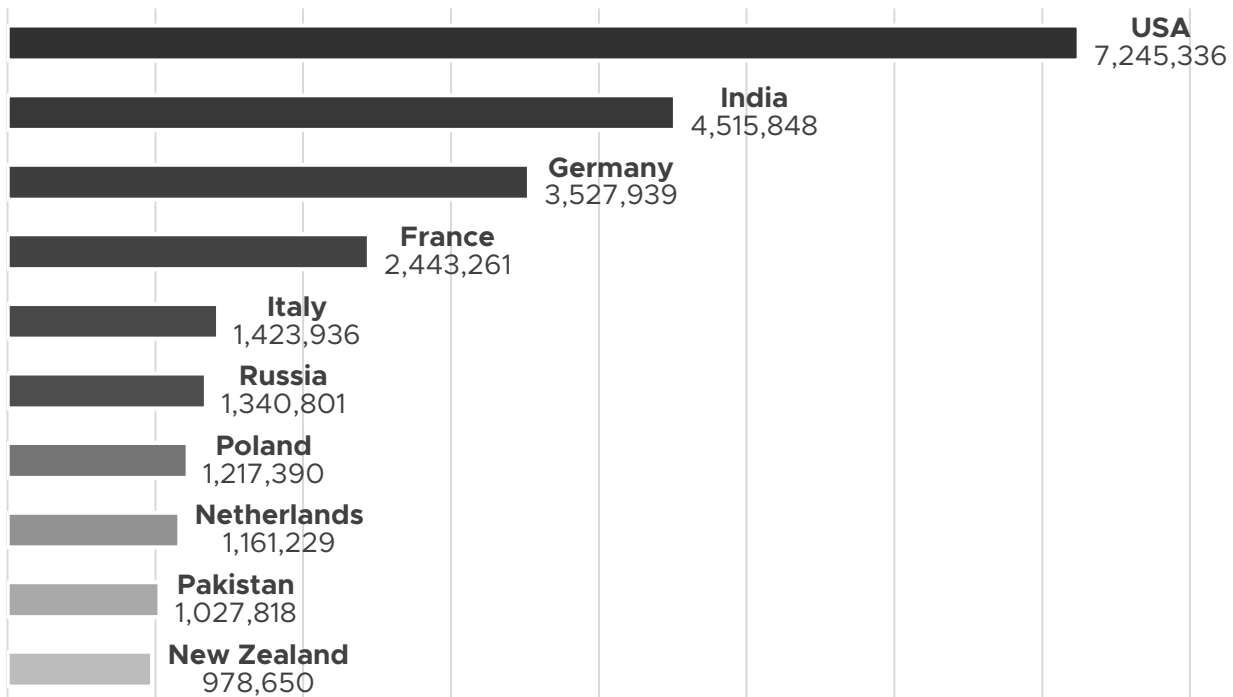
A livello di singoli Paesi produttori di burro e formaggio, guidano la classifica gli USA con il 18,9% dei volumi complessivi, seguiti al terzo e quarto posto da **Germania (9,2%)** e **Francia (6,4%)**. Spicca in questa classifica l'assenza della **Cina**, che si posiziona al 26esimo posto tra i produttori mondiali di dairy, non appartenendo i latticini alla tradizione e alla dieta cinese.



Production of dairy by type of product and milk

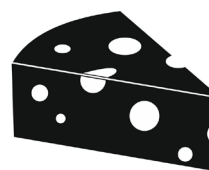
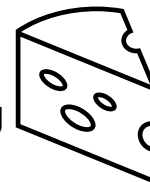


Main dairy producer countries production in tons



Source: elaboration on data FAO, CLAL

Production of dairy by type of product and ranking among world dairy producer countries in target countries



Rank	Butter	*000 tons
5°	Germany	506
6°	France	413
9°	Ireland	265
11°	Poland	243
13°	Great Britain	186
16°	Egypt	122
20°	Italy	96
27°	Spain	44
30°	Switzerland	39
33°	Austria	38
34°	Morocco	36
36°	Portugal	32
41°	Czech Republic	27
55°	Romania	12
64°	Hungary	9
65°	Macedonia	6
69°	Albania	5
72°	Croatia	3
81°	Slovenia	3
83°	Serbia	2
97°	Bulgaria	1
110°	Montenegro	1
112°	Bosnia	0
	Target	2,089
	World Tot	11,207

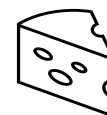
Ranking of 120 countries

Rank	Cheese	*000 tons
2°	Germany	2,355
3°	France	1,906
4°	Italy	1,345
6°	Poland	894
8°	Egypt	629
10°	Spain	472
13°	Great Britain	410
17°	Ireland	285
21°	Austria	206
22°	Switzerland	204
29°	Czech Republic	151
33°	Bulgaria	103
35°	Romania	97
37°	Hungary	94
40°	Portugal	81
51°	Serbia	53
57°	Morocco	33
58°	Croatia	32
69°	Slovenia	16
74°	North Macedonia	13
75°	Albania	12
84°	Montenegro	6
85°	Bosnia	6
	Target	9,403
	World Tot	21,222

Ranking of 107 countries

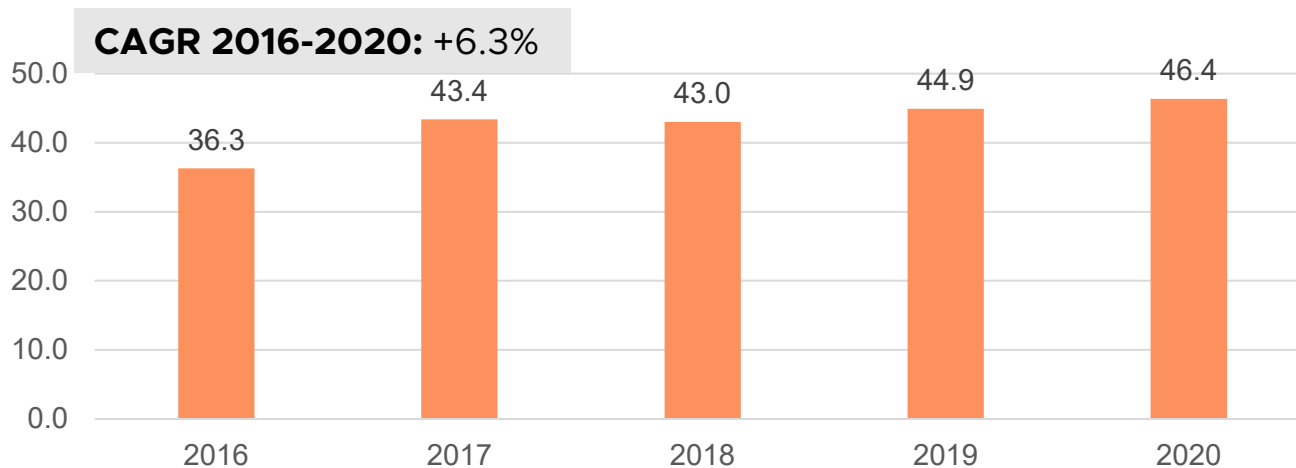
Source: elaboration on data FAO, CLAL

L'Europa occupa un posto di primo piano a livello internazionale nella produzione di dairy, in particolare per il formaggio, dove occupa metà della top ten mondiale, con **Germania, Francia e Italia** dietro solo agli **Stati Uniti**, seguite dalla **Polonia** che è al sesto posto e dalla **Spagna** al decimo. Anche nella produzione di burro **Germania, Francia e Irlanda** si ritagliano posizioni di tutto rispetto tra i grandi produttori internazionali.



SETTORE SECONDARIO

Processed dairy trend 2016-2020 in target countries (values in billion euro)

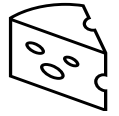


Processed dairy production in target countries (values in million euro)

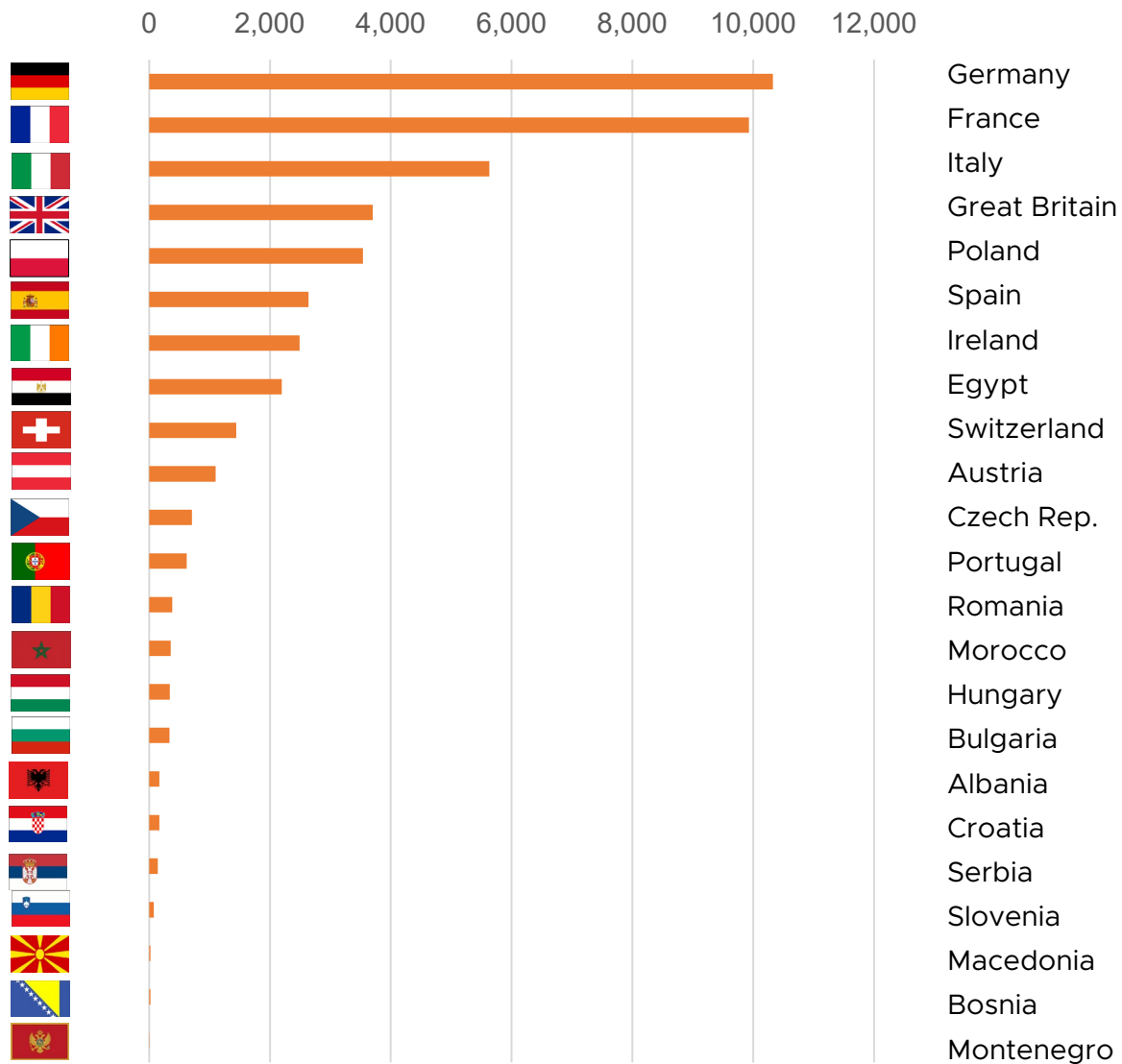
2020	
Germany	10,326
France	9,927
Italy	5,630
Great Britain	3,702
Poland	3,542
Spain	2,638
Ireland	2,492
Egypt	2,198
Switzerland	1,444
Austria	1,104
Czech Rep.	711
Portugal	623
Romania	382
Morocco	357
Hungary	343
Bulgaria	336
Albania	170
Croatia	167
Serbia	142
Slovenia	79
Macedonia	23
Bosnia	22
Montenegro	3
TOTALE	46,360

Come per le carni lavorate, anche nel segmento dei formaggi è la **Germania** a dettare legge nell'area target del Monitor, **con oltre 10 miliardi di valore prodotto dall'industria della trasformazione**, su un totale nei 23 Paesi target di 46,4 miliardi di euro. I blasonati **produttori francesi di formaggi** tallonano la leadership tedesca con **9,9 miliardi di euro**. **Al terzo posto l'industria casearia italiana con 5,6 miliardi di euro**: insieme **i tre grandi produttori e competitor europei (tedeschi, francesi e italiani) incidono per il 30% sull'industria casearia mondiale** e per poco meno del 60% nell'area target dello studio.

Source: elaboration on data Eurostat



Processed dairy production in target countries (values in million euro)



La filiera industriale di burro e formaggi, per quanto sia di nicchia nel panorama del fresh food e dell'alimentare in generale, si conferma uno dei segmenti più resilienti: anche nel difficile 2020 ha messo a segno un incremento in valore dell'1% sul 2019, dopo il ritmo decisamente sostenuto (+6,3% l'anno) mantenuto dal 2016 allo scoppio della pandemia.

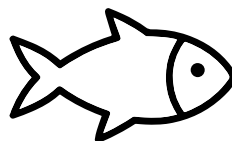
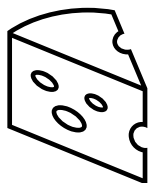
Source: elaboration on data Eurostat

2

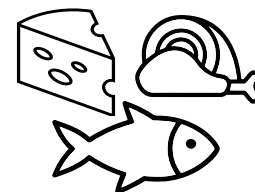
CONSUMI

FRESH FOOD

MEAT, FISH, DAIRY



2.1 QUADRO GENERALE



Consumption in volume of fresh food (mln kg)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23	Shares % 2020
Asia	228,417	248,481	284,701	313,804	2.8%	3.3%	51.9%
America	106,570	111,702	126,614	127,435	1.6%	0.2%	23.1%
Europe	83,142	83,565	92,341	87,761	0.2%	-1.7%	16.8%
Africa	35,998	34,449	39,665	42,820	-1.5%	2.6%	7.2%
Oceania	4,965	5,074	5,731	5,935	0.7%	1.2%	1.0%
World	459,093	483,272	549,052	577,756	1.7%	1.7%	100.0%

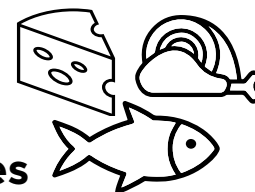
Consumption in value of fresh food (mln euro)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23	Shares % 2020
Asia	1,924,352	2,208,598	2,539,209	2,834,442	4.7%	3.7%	54.4%
America	772,452	833,385	945,556	964,036	2.6%	0.6%	20.3%
Europe	698,824	736,446	820,126	795,501	1.8%	-1.0%	17.6%
Africa	237,281	262,228	307,933	352,507	3.4%	4.6%	6.6%
Oceania	48,907	49,879	56,205	57,325	0.7%	0.7%	1.2%
World	3,681,816	4,090,536	4,669,030	5,003,811	3.6%	2.3%	100.0%

Source: elaboration on data FAO, CLAL

Al pari della produzione, **anche i consumi alimentari hanno mostrato una grande resilienza**, rispetto al complesso dei consumi mondiali, confermando il ruolo di sostegno alla ripresa economica. **A tenere alti i consumi mondiali** sono stati però prevalentemente **i mercati asiatici**, soprattutto **nel comparto fresh food** (carne, pollame incluso, pesce e latticini) mentre l'Europa (-1,7% è il CAGR previsto al 2023) fatica a tenere il passo con la crescita della domanda mondiale (con un CAGR stimato al 2023 del +1,7%).

Per i 23 Paesi target oggetto del Monitor Ipack-Ima si prevede un debole rallentamento dei consumi in volume, dopo la crescita moderata (+0,5% medio annuo) nel periodo 2016-2019, con la previsione di un **trend** solo leggermente negativo (CAGR: -0,5%) e comunque nettamente **migliore di quello europeo**.

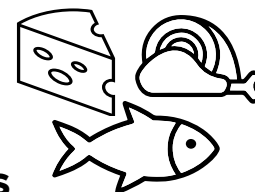


Consumption in volume of fresh food in target countries (mln kg)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Germany	9,453	9,730	10,691	10,353	1.0%	-1.1%
France	8,965	8,721	9,602	9,089	-0.9%	-1.8%
Great Britain	7,222	7,305	8,168	7,806	0.4%	-1.5%
Italy	7,285	7,291	8,028	7,462	0.0%	-2.4%
Egypt	5,562	5,537	6,648	7,554	-0.2%	4.3%
Spain	4,733	4,572	5,071	4,631	-1.1%	-3.0%
Poland	4,176	4,460	4,941	5,106	2.2%	1.1%
Morocco	1,935	2,028	2,427	2,543	1.6%	1.6%
Romania	1,499	1,792	2,007	2,132	6.1%	2.0%
Portugal	1,646	1,692	1,926	1,783	0.9%	-2.5%
Czech Rep.	1,026	1,117	1,251	1,299	2.9%	1.3%
Austria	1,055	1,061	1,163	1,094	0.2%	-2.0%
Hungary	880	855	976	976	-1.0%	0.0%
Switzerland	886	855	906	877	-1.2%	-1.1%
Ireland	540	613	697	678	4.3%	-0.9%
Bulgaria	507	532	594	620	1.6%	1.4%
Serbia	450	480	526	698	2.1%	9.9%
Croatia	411	400	434	395	-0.9%	-3.1%
Slovenia	215	206	222	207	-1.4%	-2.4%
Bosnia	160	170	188	194	2.2%	1.1%
Macedonia	147	147	166	166	0.0%	0.0%
Albania	146	143	159	159	-0.7%	0.0%
Montenegro	62	64	71	68	1.4%	-1.4%
Total	58,960	59,772	66,861	65,888	0.5%	-0.5%

Source: elaboration on data FAO, CLAL

Germania, Francia, Regno Unito e Italia sono i Paesi che consumano la maggior quantità di prodotti freschi e guidano la classifica dei consumi in valore (rappresentano il 42,6% delle quote totali del panel di 23 Paesi analizzato nel Monitor), mentre sono **Serbia (+9,9%), Egitto (+4,3%) e Romania (+2%)** a evidenziare i tassi di crescita medi annui più elevati da qui al 2023.



Consumption in value of fresh food in target countries (mln euro)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
France	109,307	111,049	123,040	118,512	0.5%	-1.2%
Italy	83,602	84,201	92,890	86,680	0.2%	-2.3%
Great Britain	69,711	73,101	82,235	79,957	1.6%	-0.9%
Germany	70,054	73,301	81,003	79,202	1.5%	-0.7%
Spain	52,847	52,906	58,959	54,632	0.0%	-2.5%
Egypt	32,946	41,296	51,339	64,096	7.8%	7.7%
Poland	20,673	22,297	24,852	26,052	2.6%	1.6%
Morocco	16,178	17,778	21,309	22,638	3.2%	2.0%
Switzerland	15,013	14,992	15,887	15,596	0.0%	-0.6%
Portugal	12,104	12,797	14,641	13,752	1.9%	-2.1%
Austria	11,049	11,539	12,757	12,137	1.5%	-1.6%
Romania	8,311	10,350	11,722	12,797	7.6%	3.0%
Czech Rep.	6,467	7,042	7,893	8,233	2.9%	1.4%
Hungary	5,276	5,727	6,680	7,014	2.8%	1.6%
Ireland	4,792	5,204	5,895	5,554	2.8%	-2.0%
Croatia	3,318	3,337	3,655	3,451	0.2%	-1.9%
Bulgaria	2,768	3,040	3,434	3,671	3.2%	2.3%
Serbia	2,791	3,035	3,343	4,439	2.8%	9.9%
Slovenia	1,725	1,716	1,867	1,784	-0.2%	-1.5%
Bosnia	1,120	1,204	1,338	1,399	2.4%	1.5%
Macedonia	1,043	1,108	1,248	1,305	2.1%	1.5%
Albania	962	975	1,095	1,120	0.5%	0.7%
Montenegro	439	476	532	539	2.8%	0.4%
Total	532,498	558,476	627,615	624,560	1.6%	-0.2%

Source: elaboration on data FAO, Statista

Di fatto nell'area target è previsto un andamento pressoché stabile (CAGR: -0,2% annuo) dei consumi di fresh food nel periodo 2020-2023: dopo l'incremento medio annuo dell'1,5% del periodo 2016-2019, si stima infatti una minima contrazione di Francia, Germania, Regno Unito e Italia che guidano la classifica dei consumi in valore,

2.2 CONSUMI DI CARNE



Consumption in volume of meat (mln kg)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23	Shares 2020
Asia	121,126	137,874	158,829	180,683	4.4%	4.4%	45%
America	85,231	90,660	102,950	104,092	2.1%	0.4%	29%
Europe	55,874	56,639	62,810	59,746	0.5%	-1.7%	18%
Africa	21,518	20,944	24,221	26,361	-0.9%	2.9%	7%
Oceania	3,417	3,548	4,044	4,234	1.3%	1.5%	1%
Total	287,165	309,666	352,853	375,116	2.5%	2.1%	100%

Consumption in value of meat (mln euro)

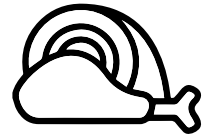
Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23	Shares 2020
Asia	742,810	855,438	986,526	1,111,380	4.8%	4.1%	44%
America	522,480	561,589	635,399	643,794	2.4%	0.4%	28%
Europe	395,694	416,434	464,188	448,816	1.7%	-1.1%	21%
Africa	99,129	109,362	128,397	146,571	3.3%	4.5%	6%
Oceania	31,254	31,774	35,877	36,430	0.6%	0.5%	2%
Total	1,791,367	1,974,596	2,250,387	2,386,990	2.9%	1.5%	100.0%

Source: elaboration on data FAO, Statista

Se si scende nel dettaglio del **settore carni**, si evince come **i consumi** siano destinati a rallentare nel prossimo triennio, ma in modo graduale e restando sempre in territorio positivo: **+2,1% da qui al 2023, contro il +2,5% dei quattro anni precedenti**. Una dinamica che si deve alla crescita dei consumi in Asia, dove si prevede un ritmo più che doppio rispetto al trend medio del mercato, andando a bilanciare così il rallentamento dei consumi europei (-1,7% in volume, seppure in parte mitigato dal rialzo dei prezzi). **Anche l'Africa tornerà a contribuire all'aumento di domanda**, dopo il calo degli ultimi anni.

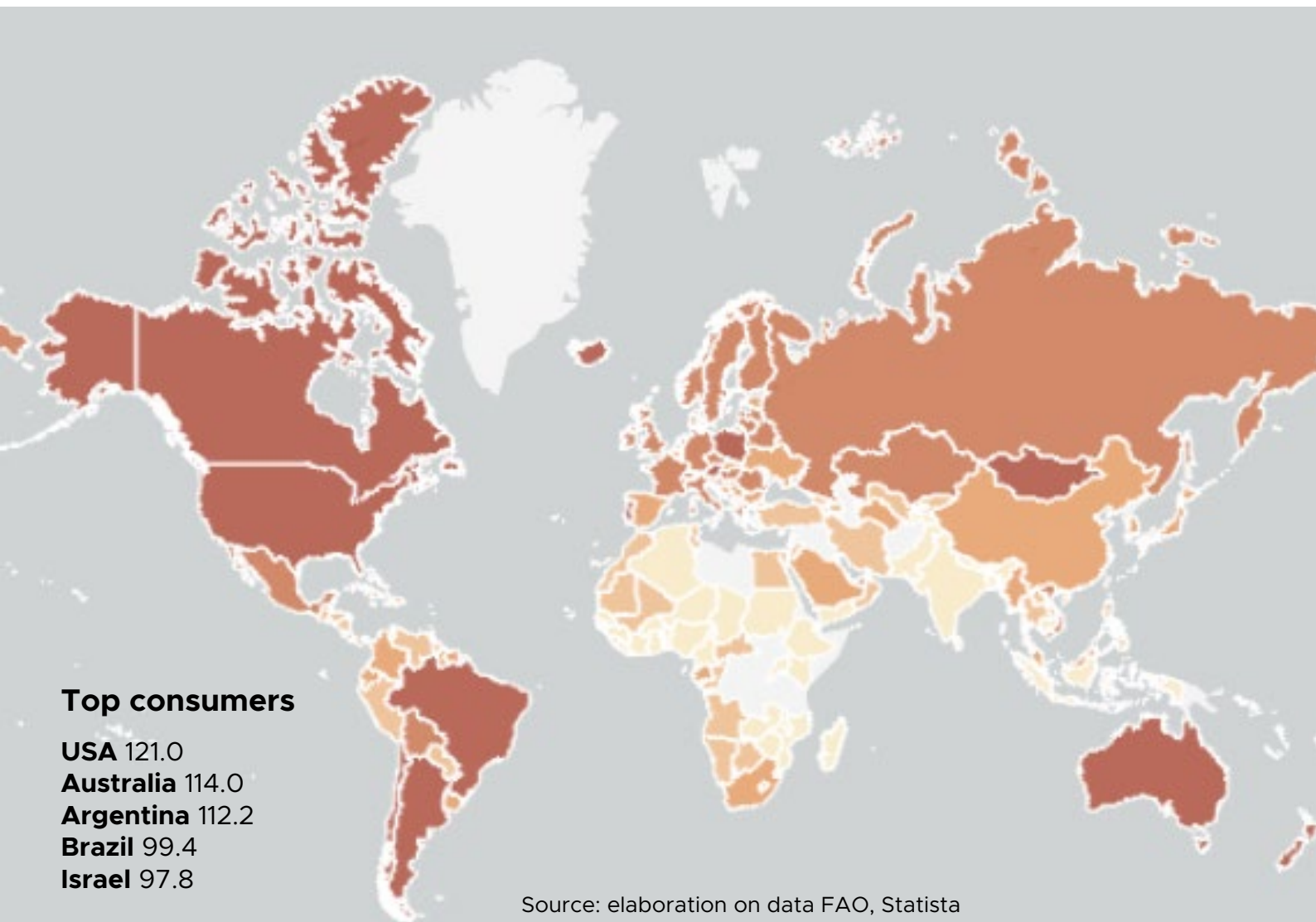
I consumi di carne risentono molto della progressiva crescita del reddito procapite nei Paesi a basso reddito, ma anche dell'effetto di mode alimentari ed invecchiamento della popolazione (che agiscono nella direzione opposta, riducendo la domanda) nei Paesi occidentali. **L'America** era e resta comunque la **prima regione per consumi procapite**.

A livello di singoli Paesi, ritroviamo gli Stati Uniti al primo posto per consumi procapite a livello mondiale, con 121 kg di carne a testa in un anno, contro una media mondiale di poco superiore a 33 kg procapite. Tra i Paesi focus del Monitor si fa notare il dato del Portogallo, con 97,7 kg di carne consumata, in media, da ciascun abitante, davanti a Polonia e Austria.



World consumption per capita of meat (poultry included) in 2016-2023 (volume in kg)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
America	89.0	89.3	96.2	97.8	0.1%	0.6%
Oceania	81.2	80.9	86.4	87.4	-0.1%	0.4%
Europe	67.2	69.2	74.3	73.8	1.0%	-0.2%
Asia	30.0	31.4	33.8	34.8	1.5%	0.9%
Africa	15.7	15.8	17.1	17.7	0.2%	1.2%
World	40.1	40.8	43.8	44.3	0.5%	0.4%





Consumption in volume of meat (poultry included) in target countries (mln kg)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Germany	6,440	6,701	7,402	7,205	1.3%	-0.9%
Great Britain	5,284	5,368	6,011	5,746	0.5%	-1.5%
France	5,426	5,255	5,796	5,455	-1.1%	-2.0%
Italy	4,606	4,617	5,092	4,718	0.1%	-2.5%
Poland	3,161	3,365	3,730	3,838	2.1%	0.9%
Egypt	2,866	2,918	3,507	4,009	0.6%	4.6%
Spain	2,265	2,188	2,429	2,214	-1.1%	-3.1%
Romania	1,077	1,309	1,474	1,572	6.7%	2.2%
Morocco	1,237	1,278	1,522	1,578	1.1%	1.2%
Portugal	919	938	1,067	977	0.7%	-2.9%
Czech Rep.	788	861	965	1,001	3.0%	1.2%
Hungary	791	777	888	891	-0.6%	0.1%
Austria	748	757	835	785	0.4%	-2.0%
Switzerland	593	571	604	581	-1.3%	-1.3%
Bulgaria	375	395	443	463	1.7%	1.5%
Serbia	360	387	427	570	2.5%	10.1%
Ireland	343	384	438	421	3.8%	-1.4%
Croatia	309	304	330	304	-0.5%	-2.6%
Slovenia	161	154	165	154	-1.7%	-2.4%
Bosnia	127	134	148	154	1.8%	1.2%
Albania	122	119	134	134	-0.8%	0.0%
Macedonia	113	113	126	127	0.0%	0.3%
Montenegro	46	47	51	51	1.2%	0.0%
Total	38,157	38,938	43,586	42,947	0.7%	-0.5%

Source: elaboration on data FAO, Statista

Analizzando le dinamiche dei consumi di carne **nei 23 Paesi target**, spicca l'andamento a macchia di leopardo nei diversi mercati: si prevede complessivamente **un trend medio annuo del -0,5%** nel periodo 2020-2023 rispetto a un incremento del +0,7% nel triennio precedente.

Germania, Gran Bretagna e Francia sono i principali consumatori di carne: da soli, essi rappresentano ben il 44,1% delle quote totali dei 23 Paesi target.



Consumption per capita of meat (poultry included) in target countries in 2016-2023 (volume in kg)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Portugal	88.5	91.0	97.7	95.7	0.9%	-0.7%
Poland	83.1	88.7	96.8	98.3	2.2%	0.5%
Austria	85.9	84.9	90.5	86.7	-0.4%	-1.4%
Germany	78.6	80.5	86.6	86.2	0.8%	-0.2%
Czech Rep.	74.1	80.4	88.0	89.9	2.8%	0.7%
Great Britain	80.2	79.9	85.6	83.9	-0.2%	-0.7%
Hungary	68.2	79.7	87.9	91.5	5.3%	1.3%
France	81.1	78.0	82.9	80.1	-1.3%	-1.1%
Italy	77.2	77.5	82.4	79.7	0.1%	-1.1%
Ireland	71.5	76.9	81.7	80.5	2.4%	-0.5%
Montenegro	73.6	76.4	81.1	79.3	1.2%	-0.7%
Croatia	75.6	75.2	80.8	77.8	-0.2%	-1.3%
Slovenia	76.6	73.1	77.2	73.1	-1.5%	-1.8%
Romania	54.6	67.9	75.1	80.4	7.5%	2.3%
Switzerland	70.2	66.1	69.5	65.5	-2.0%	-2.0%
Bulgaria	53.2	57.3	63.2	66.9	2.5%	1.9%
Serbia	51.5	56.0	60.4	81.0	2.9%	10.3%
Macedonia	53.6	54.0	58.1	58.6	0.2%	0.3%
Spain	48.0	46.2	49.1	46.4	-1.3%	-1.9%
Albania	42.7	41.8	45.5	47.3	-0.7%	1.3%
Bosnia	38.0	41.0	44.5	45.9	2.6%	1.0%
Morocco	34.9	34.6	37.2	38.2	-0.2%	0.8%
Egypt	29.8	28.5	31.7	34.6	-1.4%	3.0%

Source: elaboration on data FAO, Statista

A livello di consumi pro capite, tra i 23 Paesi target va evidenziato il balzo di domanda in Serbia (+10,3%) ed il buon tasso di crescita di Egitto e Romania. Si osserva, invece, un calo di consumi in **Svizzera, Spagna, Francia e Slovenia**, già iniziato negli ultimi cinque anni e destinato a proseguire da qui al 2023.



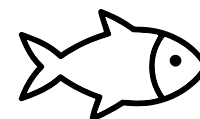
Consumption in value of meat (poultry included) in target countries (mln euro)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
France	55,719	56,063	62,010	59,071	0.2%	-1.6%
Germany	47,302	49,568	54,924	53,659	1.6%	-0.8%
Italy	44,713	44,664	49,234	45,472	0.0%	-2.6%
Great Britain	41,228	43,040	48,404	46,770	1.4%	-1.1%
Spain	19,220	19,165	21,354	19,687	-0.1%	-2.7%
Poland	14,344	15,454	17,240	18,034	2.5%	1.5%
Egypt	10,787	13,470	16,738	20,806	7.7%	7.5%
Switzerland	9,264	9,198	9,740	9,501	-0.2%	-0.8%
Austria	7,588	7,937	8,794	8,365	1.5%	-1.7%
Morocco	6,607	7,251	8,688	9,216	3.1%	2.0%
Romania	5,608	6,979	7,928	8,637	7.6%	2.9%
Portugal	5,753	6,062	6,946	6,485	1.8%	-2.3%
Czech Rep.	4,428	4,819	5,408	5,630	2.9%	1.3%
Hungary	4,228	4,573	5,331	5,578	2.7%	1.5%
Ireland	2,659	2,886	3,275	3,073	2.8%	-2.1%
Croatia	2,375	2,388	2,616	2,464	0.2%	-2.0%
Bulgaria	2,004	2,200	2,488	2,655	3.2%	2.2%
Serbia	1,909	2,072	2,291	3,031	2.8%	9.8%
Slovenia	1,186	1,178	1,282	1,223	-0.2%	-1.6%
Bosnia	817	878	978	1,021	2.4%	1.5%
Macedonia	732	778	879	920	2.1%	1.5%
Albania	733	742	836	851	0.4%	0.6%
Montenegro	285	309	344	349	2.7%	0.5%
Total	289,488	301,674	337,727	332,498	1.4%	-0.5%

Source: elaboration on data FAO, Statista

La Francia si conferma al primo posto per i consumi di carne in valore, seguita da Germania e Italia. Le dinamiche viste in precedenza per i volumi si confermano anche sul mercato misurato in valore: la tendenza media annua nei Paesi target si colloca, infatti, mezzo punto sotto lo zero (-0,5%).

2.3 CONSUMI DI PESCE



Consumption in volume of fish (mln kg)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23	Shares 2020
Asia	102,654	105,796	120,433	127,235	1.0%	1.8%	70%
Europe	16,825	16,283	17,986	16,802	-1.1%	-2.2%	11%
America	15,220	14,980	17,049	16,842	-0.5%	-0.4%	10%
Africa	13,526	12,626	14,452	15,369	-2.3%	2.1%	8%
Oceania	893	889	991	999	-0.3%	0.3%	1%
World	149,118	150,574	170,910	177,247	0.1%	0.9%	100%

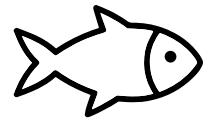
Consumption in value of fish (mln euro)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23	Shares 2020
Asia	1,146,860	1,312,371	1,505,989	1,669,379	4.6%	3.5%	68%
Europe	226,526	239,054	267,351	259,277	1.8%	-1.0%	12%
America	203,785	222,081	255,157	263,700	2.9%	1.1%	12%
Africa	131,769	145,746	171,242	196,025	3.4%	4.6%	8%
Oceania	13,486	13,877	15,668	16,084	1.0%	0.9%	1%
World	1,722,425	1,933,130	2,215,407	2,404,465	3.7%	2.4%	100%

Source: elaboration on data FAO, Statista

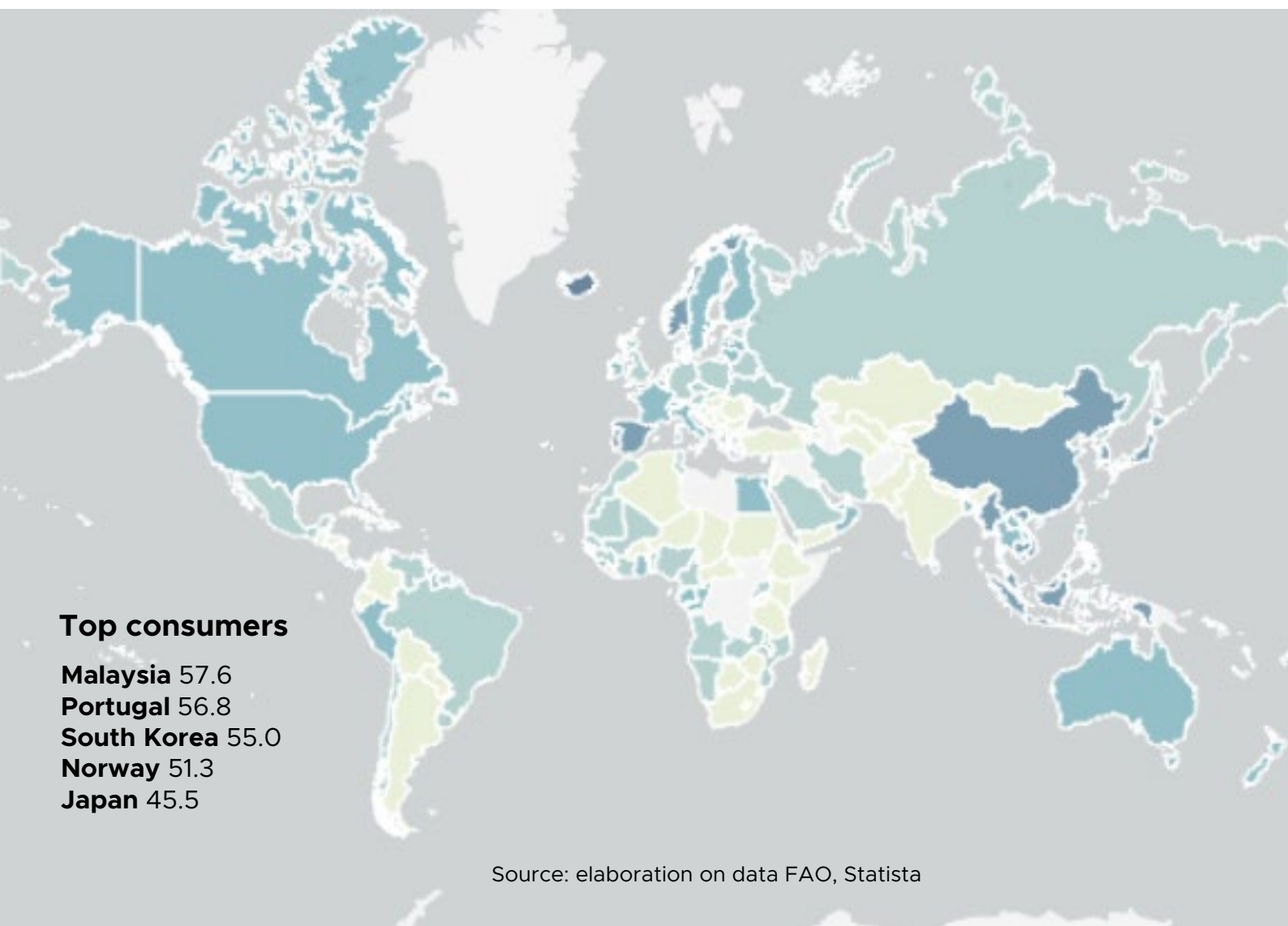
Analizzando il comparto del pesce, si evince come **i consumi**, dopo il rallentamento degli ultimi anni, siano **destinati a riprendere fino al 2023** con dinamiche però diametralmente opposte tra Europa e America, da un lato, e Asia e Africa dall'altro: si prevede, infatti, una crescita di quasi un punto percentuale al 2023 a livello mondiale, ma con un +1,8% di CAGR in Asia e un -2,2% in Europa (le due macroaree con i maggiori consumi ittici), l'America a -0,4% e l'Africa a +2,1% l'anno.

Quelle che, invece, non sono destinate a cambiare a breve termine sono le abitudini alimentari dei diversi Paesi, con la **Malesia** che consuma 57,6 kg di pesce per abitante, contro i 56,8 kg del **Portogallo**, unico Paese target del Monitor Ipack-Ima **nella top five mondiale per consumi procapite**.



World consumption per capita of fish in 2016-2023 (volume in kg)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Oceania	27.7	26.5	27.7	27.1	-1.5%	-0.7%
Asia	25.2	24.2	25.8	25.2	-1.2%	-0.8%
Europe	20.5	19.9	21.2	20.5	-1.1%	-1.0%
America	15.7	14.8	16.0	16.3	-2.0%	0.6%
Africa	11.1	10.4	11.1	11.1	-2.1%	0.0%
World	21.0	20.2	21.8	21.4	-1.3%	-0.6%





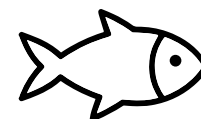
Consumption in volume of fish in target countries (mln kg)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Egypt	2,494	2,424	2,914	3,288	-0.9%	4.1%
France	2,368	2,316	2,564	2,442	-0.8%	-1.6%
Spain	2,101	2,011	2,232	2,029	-1.5%	-3.1%
Italy	1,810	1,775	1,959	1,813	-0.7%	-2.5%
Great Britain	1,320	1,326	1,490	1,421	0.3%	-1.5%
Germany	1,122	1,061	1,157	1,069	-1.8%	-2.5%
Morocco	669	719	867	925	2.4%	2.2%
Portugal	569	586	669	625	1.0%	-2.5%
Poland	396	406	450	460	0.8%	0.8%
Switzerland	154	146	158	154	-1.1%	-0.8%
Austria	139	126	134	121	-3.2%	-3.8%
Ireland	107	117	132	127	3.4%	-1.6%
Romania	98	115	129	135	5.3%	1.8%
Czech Rep.	102	100	112	112	-0.3%	0.0%
Croatia	82	76	82	70	-3.0%	-3.4%
Hungary	70	61	70	68	-4.2%	-1.1%
Bulgaria	49	49	54	56	-0.4%	0.7%
Serbia	43	43	45	57	-1.0%	8.0%
Slovenia	25	25	28	25	-1.9%	-2.5%
Bosnia	14	16	18	18	1.1%	0.9%
Macedonia	13	13	15	14	-0.8%	-0.1%
Albania	15	15	15	15	-2.3%	-0.8%
Montenegro	9	9	12	9	-0.5%	-0.9%
Total	13,767	13,534	15,306	15,053	-0.6%	-0.9%

Source: elaboration on data FAO, Statista

Il rallentamento evidenziato in precedenza nei consumi di carne si ritrova anche nel segmento pesce, altra categoria di fonte di proteine nobili. **I consumi nei Paesi target da qui al 2023 sono previsti in diminuzione (CAGR: -0,9%)**, una contrazione, del resto, in linea con il triennio precedente.

Egitto, Francia e Spagna sono ai primi tre posti per i consumi di pesce in volume, con il 50,4% delle quote complessive.



Consumption per capita of fish in target countries in 2016-2023 (volume in kg)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Portugal	50.7	52.7	56.8	56.3	1.4%	-0.2%
Spain	41.9	40.0	42.5	40.0	-1.5%	-2.0%
France	33.2	32.4	34.4	33.6	-1.0%	-0.7%
Italy	28.4	27.9	29.8	28.8	-0.6%	-1.1%
Egypt	23.3	21.2	23.7	25.7	-3.0%	2.5%
Ireland	20.6	22.0	23.4	23.0	2.2%	-0.7%
Great Britain	18.5	18.5	19.7	19.7	-0.4%	-0.6%
Morocco	17.2	18.0	19.5	20.2	1.1%	1.8%
Croatia	19.4	17.5	18.7	17.5	-2.5%	-2.2%
Switzerland	16.9	16.2	16.9	16.2	-1.8%	-1.6%
Austria	14.9	13.3	14.1	12.4	-4.0%	-3.2%
Montenegro	13.5	13.3	14.1	13.5	-0.3%	-1.2%
Germany	12.8	12.0	12.8	12.0	-2.3%	-1.8%
Slovenia	12.0	11.4	12.0	11.4	-2.0%	-1.8%
Poland	9.6	9.8	10.7	10.9	1.0%	0.3%
Czech Rep.	8.7	8.5	9.3	9.1	-0.5%	-0.6%
Bulgaria	6.4	6.6	7.1	7.4	0.3%	1.2%
Hungary	5.3	5.8	6.3	6.5	3.6%	0.6%
Macedonia	5.9	5.8	6.2	6.2	-0.8%	-0.2%
Serbia	6.0	6.0	6.2	8.0	-0.6%	8.2%
Romania	4.5	5.4	6.0	6.3	6.0%	1.9%
Albania	5.4	5.0	5.4	5.4	-2.0%	0.4%
Bosnia	4.1	4.4	4.9	4.9	2.0%	0.9%

Source: elaboration on data FAO, Statista

Proprio grazie all'effetto di traino esercitato dall'elevato consumo per abitante di Spagna, Italia, Portogallo, Francia, Irlanda e Gran Bretagna, l'Europa si colloca al terzo posto (dietro all'Oceania e all'Asia) fra le macroaree ad elevato consumo di pesce procapite, anche se in diverse Nazioni europee il consumo di pesce è inferiore ai 7 kg medi per abitante.

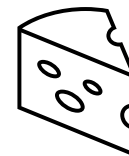


Consumption in value of fish in target countries (mln euro)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
France	44,635	45,921	51,162	49,810	1.0%	-0.9%
Spain	30,617	30,710	34,286	31,796	0.1%	-2.5%
Italy	29,575	30,195	33,528	31,645	0.7%	-1.9%
Egypt	20,964	26,316	32,763	40,945	7.9%	7.7%
Great Britain	23,220	24,565	27,767	27,205	1.9%	-0.7%
Germany	11,758	12,236	13,528	13,127	1.3%	-1.0%
Morocco	9,367	10,301	12,357	13,134	3.2%	2.1%
Portugal	5,121	5,439	6,248	5,880	2.0%	-2.0%
Poland	3,801	4,120	4,608	4,852	2.7%	1.7%
Switzerland	3,553	3,605	3,842	3,827	0.5%	-0.1%
Austria	2,348	2,439	2,695	2,548	1.3%	-1.9%
Ireland	1,674	1,822	2,071	1,954	2.9%	-1.9%
Czech Rep.	1,231	1,346	1,513	1,583	3.0%	1.5%
Romania	964	1,205	1,370	1,499	7.7%	3.0%
Hungary	899	996	1,170	1,251	3.5%	2.3%
Croatia	771	777	853	809	0.3%	-1.8%
Serbia	520	569	626	838	3.0%	10.2%
Bulgaria	420	464	525	563	3.3%	2.4%
Slovenia	354	354	388	371	0.0%	-1.5%
Bosnia	159	172	191	201	2.6%	0.9%
Albania	155	158	176	183	0.6%	-0.8%
Macedonia	139	148	167	174	2.2%	1.4%
Montenegro	102	111	125	125	2.8%	0.6%
Total	192,348	203,969	231,960	234,319	2.0%	0.3%

Source: elaboration on data FAO, Statista

Italia, Francia e Spagna guidano la classifica dei consumi di pesce in valore e sono responsabili del 51% della quota complessiva per i Paesi target, ma per la Spagna è atteso un rallentamento della domanda, così come anche in Portogallo (in entrambi i Paesi, intorno al -2% medio annuo). L'aumento dei consumi in volume già riscontrato per **Serbia, Egitto e Romania** è confermato anche in termini di valore.



2.4 CONSUMI DAIRY

Consumption in volume of dairy (mln kg)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Europe	10,443	10,642	11,545	11,213	0.6%	-1.0%
America	6,120	6,063	6,615	6,502	-0.3%	-0.6%
Asia	4,637	4,811	5,439	5,886	1.2%	2.7%
Africa	955	879	993	1,090	-2.8%	3.2%
Oceania	655	637	696	702	-1.0%	0.3%
World	22,810	23,032	25,288	25,393	0.3%	0.1%

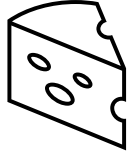
Consumption in value of dairy (mln euro)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Europe	76,605	80,958	88,587	87,408	1.9%	-0.4%
America	46,187	49,715	55,000	56,542	2.5%	0.9%
Asia	34,681	40,789	46,694	53,683	5.6%	4.8%
Africa	6,383	7,120	8,294	9,911	3.7%	6.1%
Oceania	4,167	4,228	4,661	4,812	0.5%	1.1%
World	168,024	182,810	203,236	212,356	2.9%	1.5%

Source: elaboration on data FAO, Statista

Il settore lattiero-caseario conferma la propria stabilità anche quando viene letto dal versante dei consumi. Fa eccezione l'Africa, che ha risentito negli ultimi anni di dinamiche socio-politiche e demografiche fortemente impattanti sulla spesa alimentare delle famiglie, a prescindere dai prodotti.

Nel complesso i tassi di crescita del Dairy sono oscillazioni sopra lo zero sia che si guardi indietro sia che si osservi lo scenario dei prossimi anni: **nel periodo 2016-2019 il consumo di formaggi e burro ha segnato un +0,3% a livello mondiale in volume che si prevede sarà seguito da qui al 2023 da una crescita stabile di poco superiore allo zero (+0,1%)**. Sarà l'aumento dei prezzi a portare valore sul mercato. In termini di consumi pro capite primeggia l'**Europa** – e, con essa, gran parte dei Paesi target del Monitor - **con oltre 15,4 kg di consumi procapite**, oltre quattro volte maggiori di quelli americani e sette volte superiori a quelli asiatici.



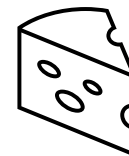
World consumption per capita of dairy in 2016-2023 (volume in kg)

Areas	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Europe	14.0	14.6	15.4	15.5	1.3%	0.2%
Oceania	10.9	10.2	10.6	10.4	-2.1%	-0.4%
America	3.5	3.2	3.3	3.2	-2.3%	-1.1%
Asia	2.2	2.2	2.2	2.3	-1.2%	0.3%
Africa	0.6	0.6	0.6	0.6	-2.2%	1.7%
World	5.4	5.5	5.7	5.8	0.4%	0.1%

Top consumers

Finland 25.3
Germany 24.8
Ireland 24.6
Sweden 24.0
Australia 23.8

Source: elaboration on data FAO, Statista



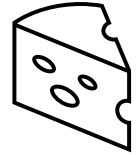
Consumption in volume of dairy in target countries (mln kg)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Germany	1,891	1,968	2,132	2,079	1.3%	-0.8%
France	1,170	1,150	1,243	1,192	-0.6%	-1.4%
Italy	869	900	977	931	1.2%	-1.6%
Poland	619	689	760	808	3.6%	2.0%
Great Britain	618	611	667	639	-0.4%	-1.4%
Spain	367	373	409	388	0.6%	-1.7%
Romania	324	368	404	424	4.3%	1.6%
Egypt	203	195	227	257	-1.4%	4.2%
Austria	169	178	194	188	1.8%	-1.1%
Portugal	158	169	189	181	2.2%	-1.3%
Czech Rep.	137	157	174	186	4.7%	2.2%
Switzerland	139	138	145	142	-0.3%	-0.6%
Ireland	90	112	126	130	7.8%	0.9%
Bulgaria	83	88	97	101	1.9%	1.5%
Serbia	48	50	54	71	1.6%	9.5%
Morocco	29	32	37	40	3.1%	2.8%
Slovenia	28	27	29	28	-0.6%	-1.6%
Macedonia	22	22	25	25	1.0%	1.2%
Croatia	20	20	22	21	0.4%	-1.4%
Bosnia	18	20	22	23	2.5%	1.8%
Hungary	19	16	18	17	-4.4%	-1.9%
Albania	9	9	10	10	-0.7%	0.7%
Montenegro	7	8	8	8	2.0%	0.4%
Total	7,036	7,300	7,969	7,888	1.2%	-0.3%

Source: elaboration on data FAO, Statista

Nei 23 paesi target i consumi in volume di prodotti dairy sono previsti in leggero rallentamento (CAGR stimato pari al -0,3%) quest'anno e per i prossimi due.

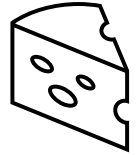
I consumi più elevati di burro e formaggio si registrano in Germania, Francia e Italia (54,6% il loro impatto sulle quote complessive). Serbia, Egitto e Marocco sono invece i Paesi in cui si prevedono le crescite più consistenti nel periodo 2020-2023.



Consumption per capita of dairy in target countries in 2016-2023 (volume in kg)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Germany	23.0	23.6	24.8	24.8	0.8%	0.0%
Ireland	19.1	23.0	24.6	25.4	6.4%	1.1%
Austria	19.3	19.9	21.1	20.7	1.0%	-0.7%
Romania	16.4	19.0	20.4	21.7	5.0%	2.1%
Poland	16.3	18.2	19.7	20.9	3.7%	1.9%
France	18.1	17.7	18.3	18.1	-0.8%	-0.3%
Portugal	15.3	16.5	17.6	17.9	2.5%	0.6%
Switzerland	16.6	16.0	16.7	16.1	-1.1%	-1.2%
Czech Rep.	12.9	14.7	15.9	16.8	4.5%	1.9%
Italy	14.3	14.9	15.7	15.5	1.3%	-0.4%
Bulgaria	11.6	12.5	13.6	14.5	2.6%	2.2%
Slovenia	13.3	13.0	13.5	13.3	-0.7%	-0.7%
Hungary	9.8	11.8	12.8	13.6	6.2%	2.0%
Montenegro	11.5	12.2	12.6	13.0	2.0%	1.0%
Macedonia	10.3	10.6	11.3	11.8	0.9%	1.6%
Great Britain	9.3	9.1	9.6	9.3	-1.0%	-1.0%
Spain	7.9	8.0	8.5	8.2	0.5%	-0.9%
Serbia	6.7	7.2	7.5	10.0	2.1%	10.1%
Bosnia	5.4	6.0	6.4	6.9	3.4%	2.3%
Croatia	4.7	4.9	5.1	5.2	1.0%	0.5%
Albania	3.3	3.2	3.4	3.6	-0.6%	2.2%
Egypt	2.2	1.9	2.1	2.3	-3.4%	3.4%
Morocco	0.8	0.9	0.9	1.0	2.0%	2.8%

Source: elaboration on data FAO, Statista



Consumption in value of dairy in target countries (mln euro)

Countries	2016	2019	2020	2023	CAGR 16-19	CAGR 20-23
Germany	10,994	11,498	12,552	12,416	1.5%	-0.4%
Italy	9,314	9,342	10,128	9,563	0.1%	-1.9%
France	8,954	9,065	9,868	9,631	0.4%	-0.8%
Great Britain	5,262	5,496	6,064	5,982	1.5%	-0.5%
Spain	3,010	3,031	3,319	3,149	0.2%	-1.7%
Poland	2,528	2,724	3,004	3,166	2.5%	1.8%
Romania	1,740	2,166	2,424	2,661	7.6%	3.2%
Switzerland	2,196	2,188	2,306	2,268	-0.1%	-0.5%
Egypt	1,194	1,510	1,839	2,345	8.1%	8.4%
Portugal	1,230	1,296	1,447	1,387	1.8%	-1.4%
Austria	1,113	1,163	1,268	1,224	1.5%	-1.2%
Czech Rep.	807	877	972	1,020	2.9%	1.6%
Ireland	459	497	549	528	2.7%	-1.3%
Serbia	362	393	426	571	2.8%	10.3%
Bulgaria	344	377	421	453	3.1%	2.5%
Morocco	204	227	263	288	3.5%	3.0%
Macedonia	172	182	202	211	1.8%	1.4%
Slovenia	185	184	197	190	-0.3%	-1.2%
Croatia	172	172	186	178	0.1%	-1.5%
Hungary	150	158	178	185	1.7%	1.3%
Bosnia	144	154	169	177	2.3%	1.6%
Albania	74	75	83	86	0.3%	1.2%
Montenegro	52	57	62	64	2.8%	0.7%
Total	50,662	52,833	57,928	57,743	1.4%	-0.1%

Source: elaboration on data FAO, Statista

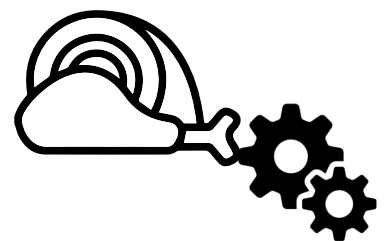
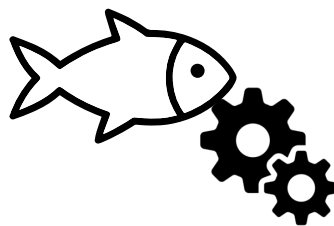
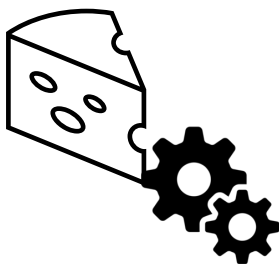
Germania, Italia e Francia guidano la classifica dei consumi di burro e formaggio in valore, con il 56,2% delle quote totali. I Paesi maggiori consumatori di prodotti caseari sono però anche quelli in cui è prevista una leggera contrazione della dinamica di breve-medio termine. **La domanda è stimata** in aumento invece in **Polonia, Bulgaria, Marocco, Romania, Egitto e Serbia**.

3

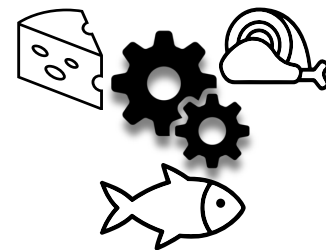
TECNOLOGIE ALIMENTARI

FRESH FOOD

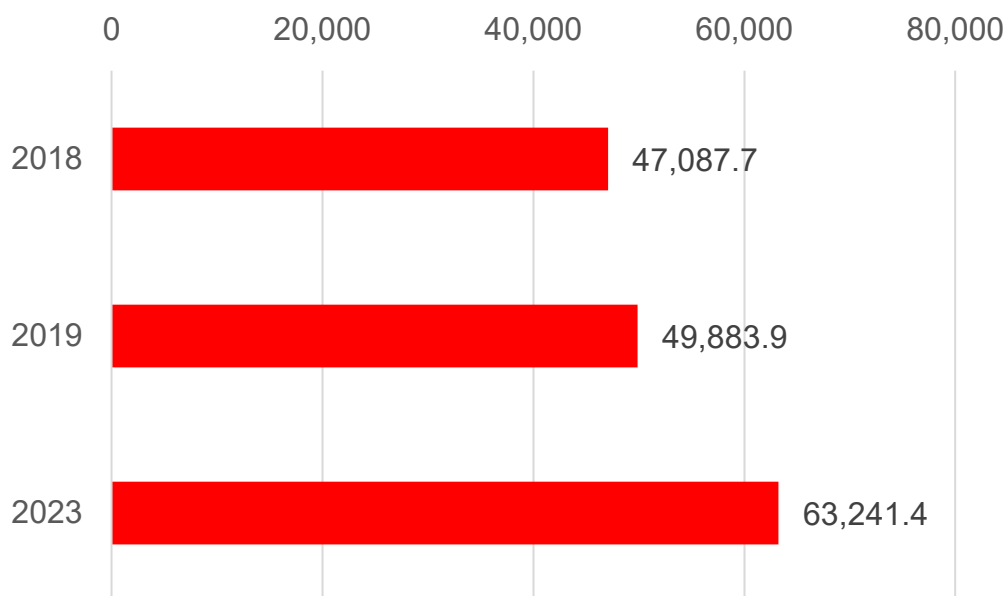
MEAT, FISH, DAIRY



3.1 QUADRO GENERALE

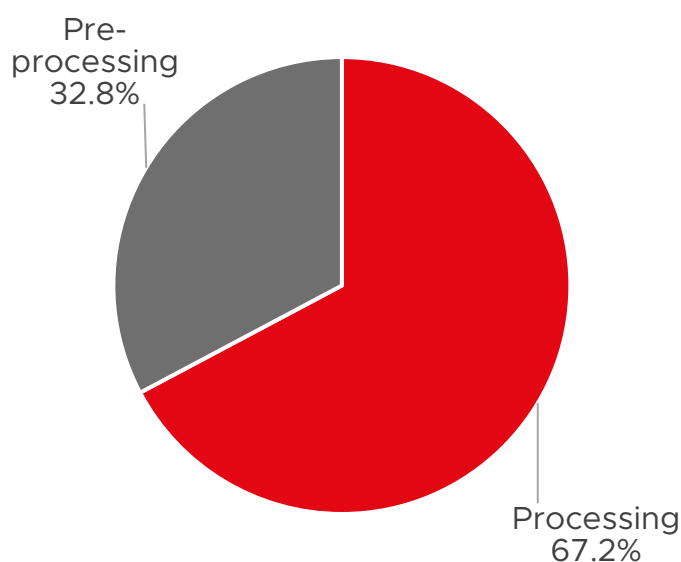


Market value (in million €) in 2018-2023 and share by technology

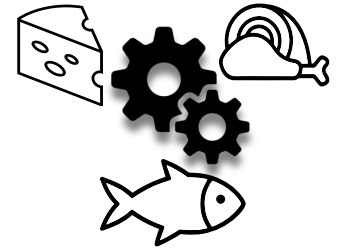


A livello globale, **le tecnologie per il food processing** – rivolte a tutti i comparti alimentari - presentano un valore complessivo di 50 mld di euro (ultimo valore a consuntivo è riferito all'anno 2019) e dopo aver messo a segno un aumento medio del mercato del 6% l'anno sono previste crescere allo stesso ritmo **fino a 63,2 mld di euro entro il 2023, con un tasso medio annuo (CAGR) del 6,1%**.

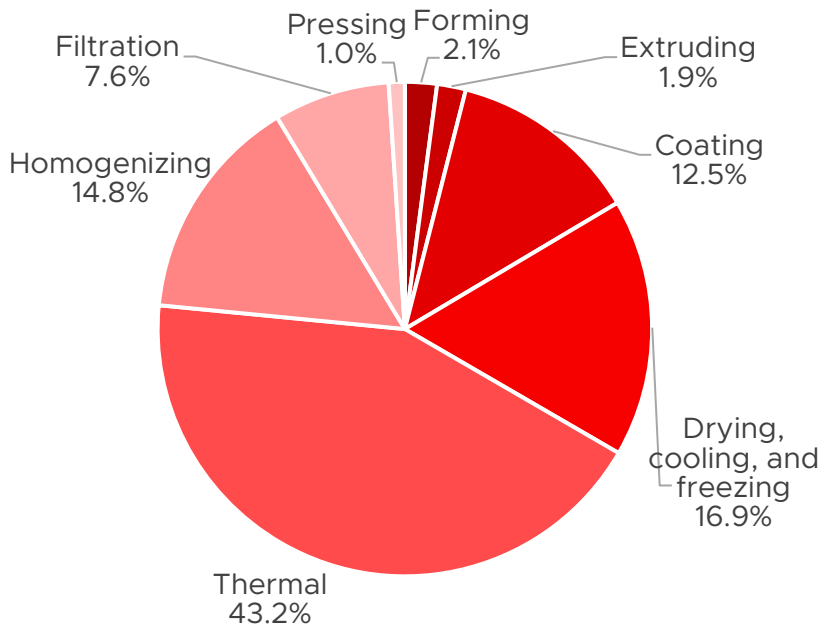
Le tecnologie per il food processing (per tutti i comparti) si possono suddividere in tecnologie di processo vere e proprie (processing), e tecnologie preparatorie (pre-processing).



Source: elaboration on FPSA, PMMI, VDMA data

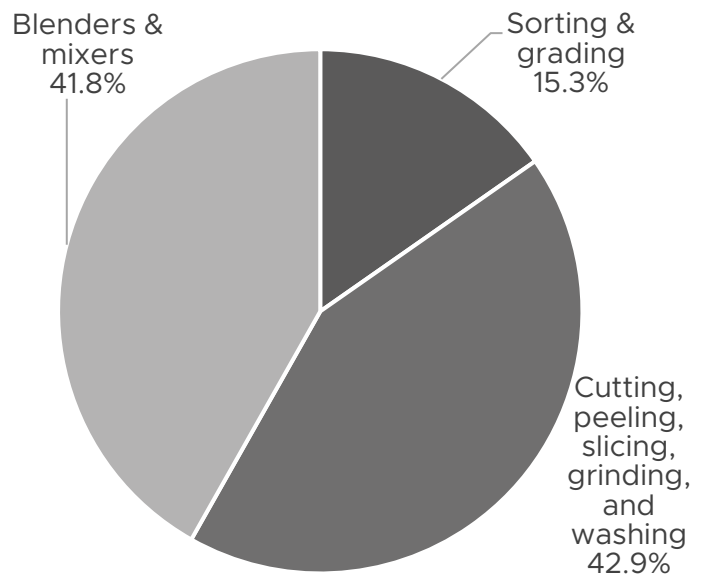


Share or market value by technology

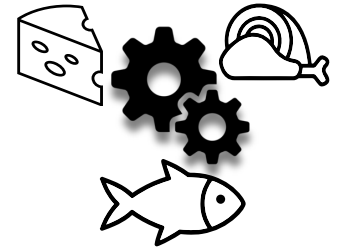


Le tecnologie di processing, con 33,6 miliardi di euro, sono responsabili di oltre due terzi (67,2%) del volume totale della macrofamiglia dei macchinari per il food, e tra esse le principali sono quelle termiche (14,5 miliardi di euro, 43,2% delle tecnologie processing) e quelle di essiccazione e refrigerazione (5,7 miliardi di euro, 16,9% del totale processing). La crescita media annua prevista per il processing (CAGR del 6,1% da oggi al 2023), è merito soprattutto **delle tecnologie termiche (+6,6%) e di raffreddamento (+6,3%),**

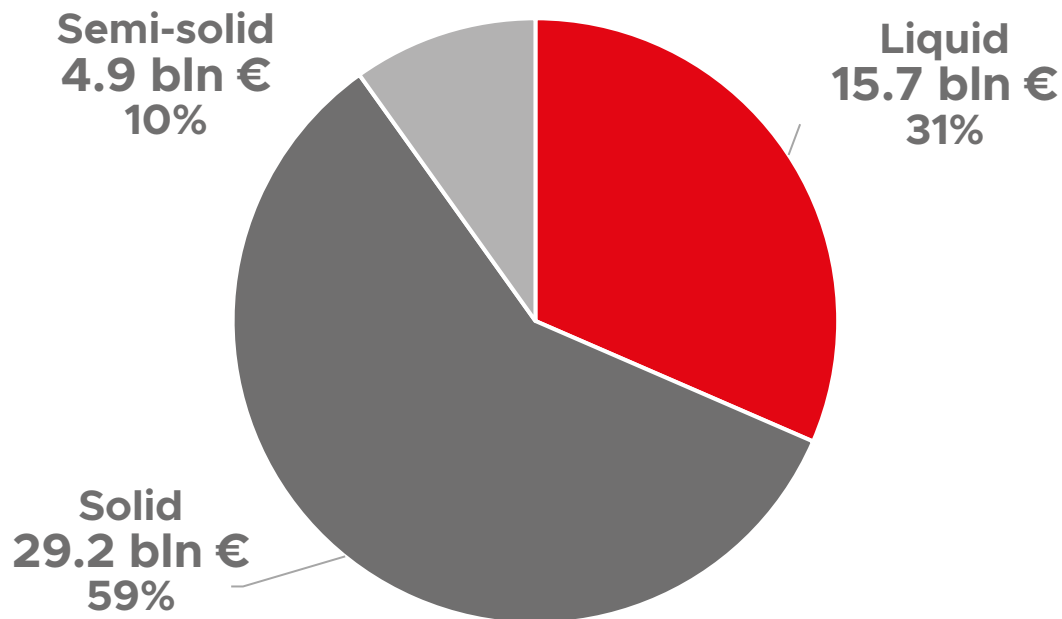
Il **pre-processing**, pari a 16,3 miliardi di euro, è caratterizzato in prevalenza (42,9%) dalle tecnologie di taglio (cutting, peeling, slicing), per 7 miliardi di euro e di miscelazione (blenders and mixers: 41,8% del pre-processing), per altri 6,8 miliardi di euro. **Le macchine per il pre-processing sono previste in crescita del 6% medio annuo nel periodo 2020-2023, trainate dall'incremento di blenders & mixers (+6,2%).**



Source: elaboration on FPSA, PMMI, VDMA data



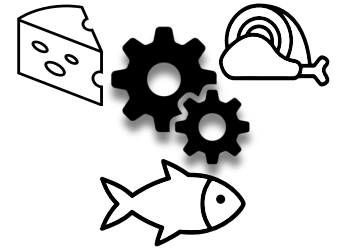
Share of value by type of product



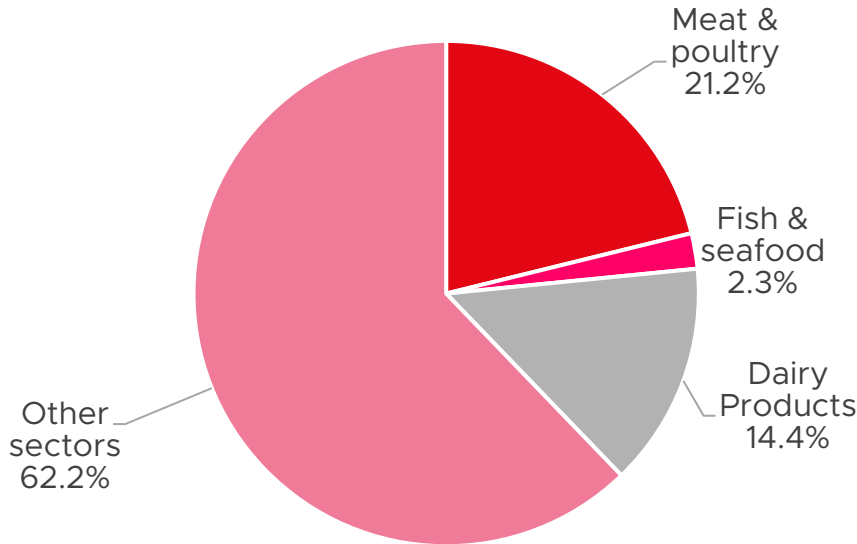
Source: elaboration on FPSA, PMMI, VDMA data

Analizzando le tecnologie per il food processing dal punto di vista del prodotto processato, **sono i prodotti solidi quelli maggiormente trattati** (58,6% del totale), con un volume di 29.2 miliardi di euro. Seguono i prodotti liquidi, responsabili di 15,7 miliardi di euro (31,5% del volume complessivo) e quelli semi-solidi, pari al 9,9% delle quote totali.

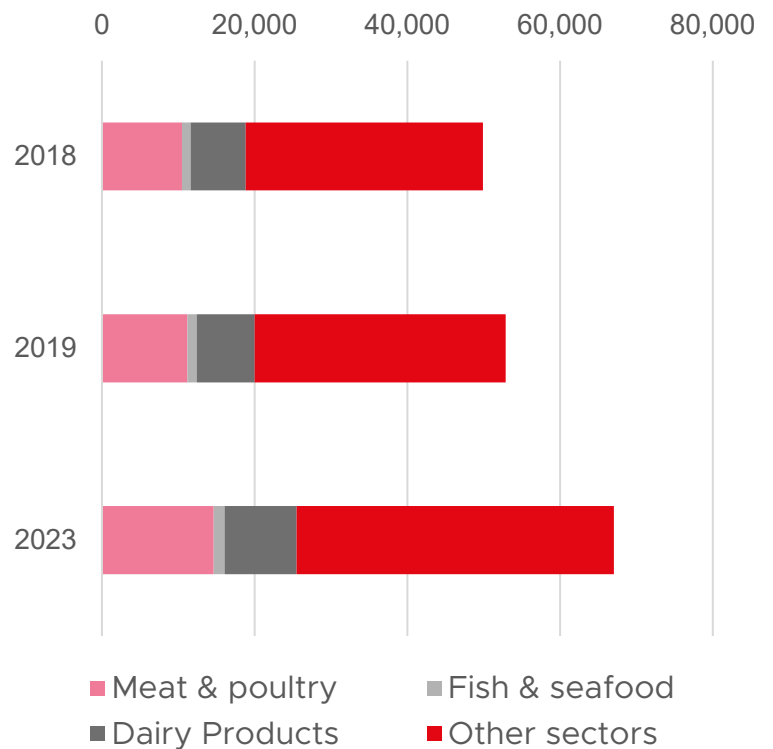
Le lavorazioni dei prodotti solidi, oltre ad essere quelle più numerose, sono anche quelle per le quali si prevede la **crescita maggiore (+6,7%** il tasso di crescita medio annuo entro il 2023), seguiti dai prodotti liquidi (+5,3%). Meno dinamici i prodotti semi-solidi, previsti comunque in crescita del 4,7% entro il 2023.



Share of market value by type of fresh food



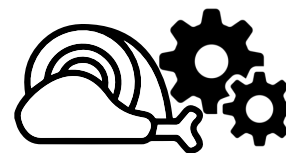
Market value by type of fresh food in million €



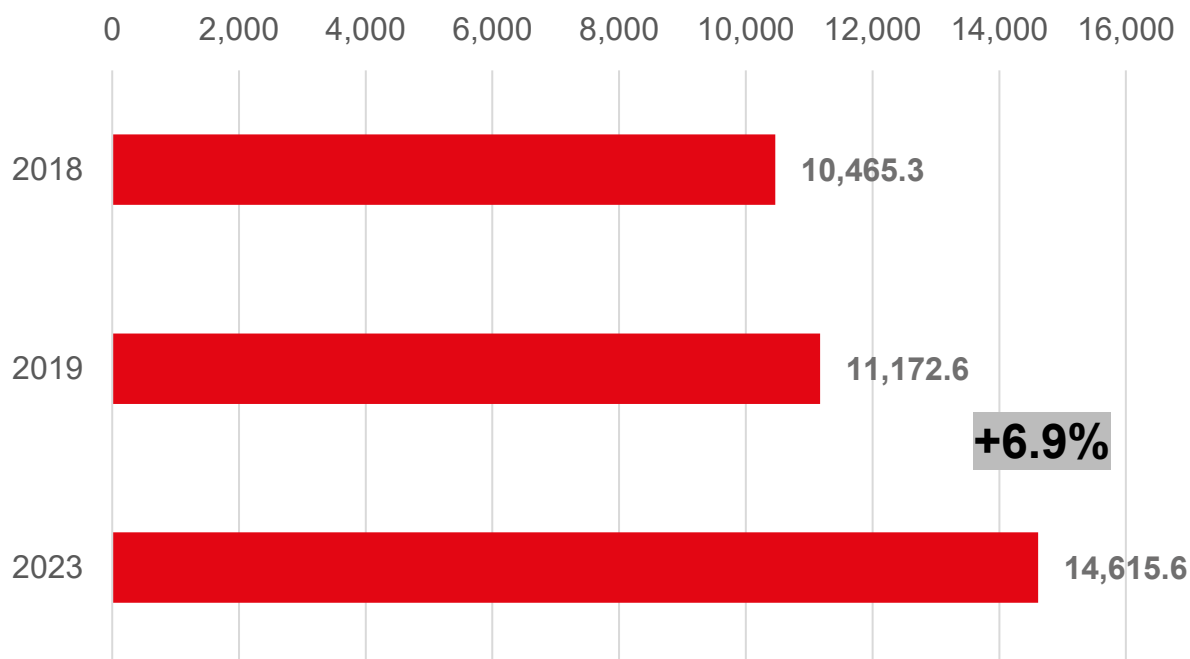
Entrando invece più nello specifico focus di questo Monitor, quindi cercando di leggere gli andamenti delle tecnologie di processo dal punto di vista delle industrie servite, si nota che le **tecnologie destinate alla carne (meat and poultry) contribuiscono per il 21,2% al giro d'affari complessivo** del comparto, con un valore di 11,2 mld di euro, quelle per la lavorazione del pesce per il 2,3%, (1,2 miliardi) mentre quelle per il dairy per il 14,4% (7,6 miliardi di euro).

Source: elaboration on FPSA, PMMI, VDMA data

3.2 TECNOLOGIE PER CARNE

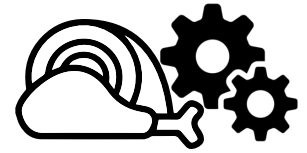


Market value in million € in 2018-2023

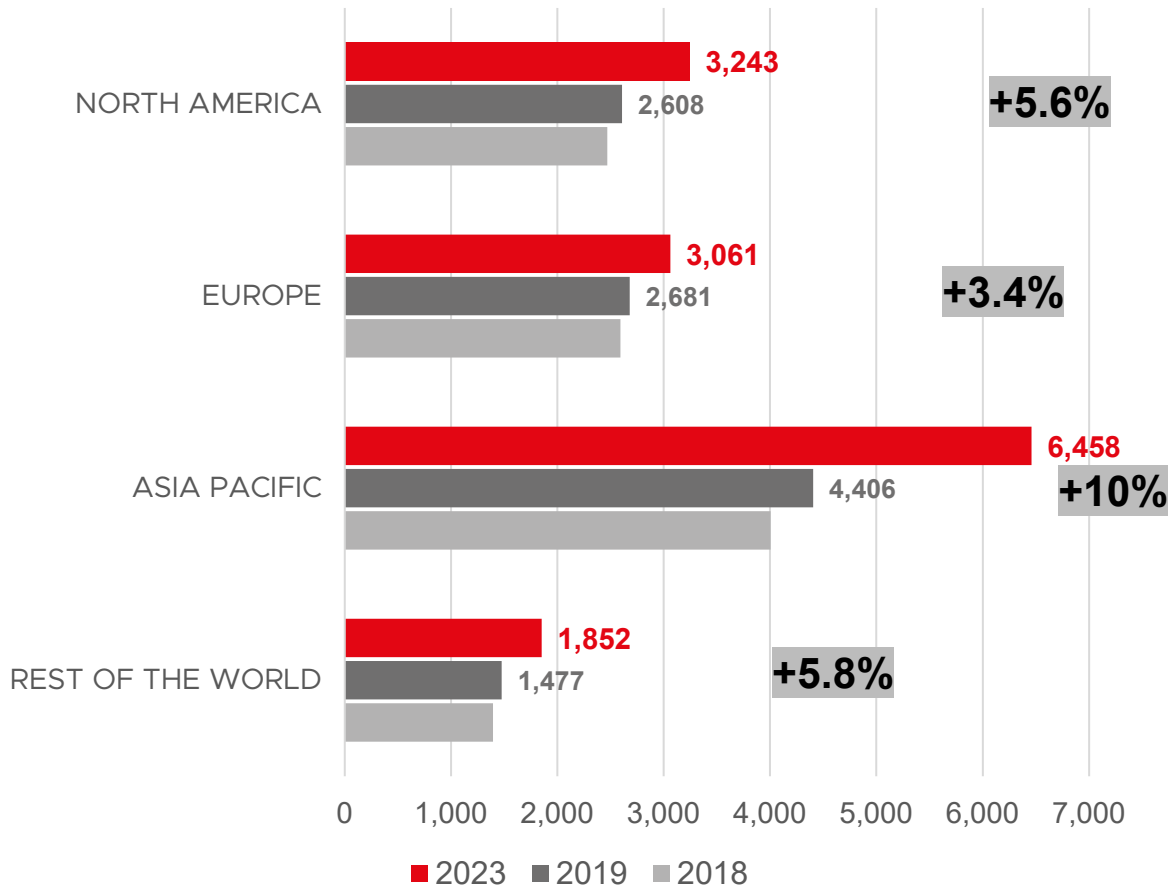


Source: elaboration on FPSA, PMMI, VDMA data

Le tecnologie per la lavorazione della carne registrano a livello globale **un giro d'affari di 11,2 miliardi** di euro e **si prevede cresceranno a un tasso medio annuo del 6,9%**, tra i più elevati fra i vari comparti del food processing, che porterà il settore ad un valore totale di 14,6 miliardi di euro nel 2023.



Market value in million € by macroarea

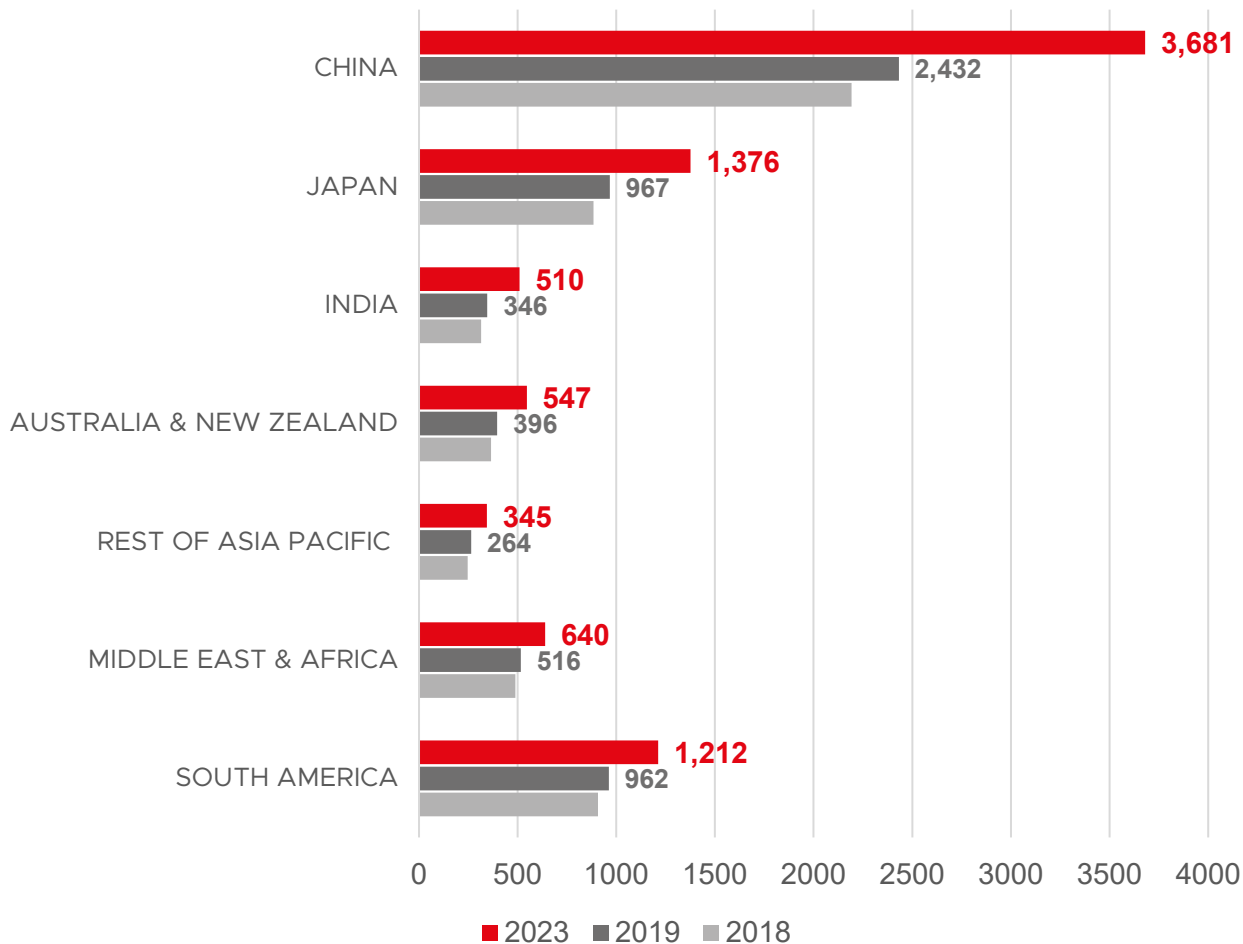
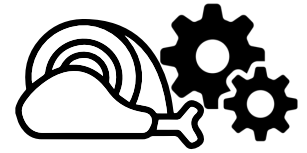


Source: elaboration on FPSA, PMMI, VDMA data

Dal punto di vista della distribuzione geografica, si ritrova anche nel mercato dei macchinari lo stesso sbilanciamento verso il Far East già riscontrato per produzione e consumo di fresh food: **le tecnologie per la lavorazione della carne si concentrano nella regione Asia Pacific per il 39,4%** (4,4 mld di euro nel 2019), seguita dalle aree europea e nordamericana rispettivamente con il 24% e il 23,3% delle quote complessive (2.6 mld di euro ciascuna).

L'area asiatica è anche quella che si prevede crescerà con i tassi più alti entro il 2023 (CAGR: 10%) e si stima arriverà a totalizzare quasi 6,5 miliardi di euro in valore. Buone le crescite del Nord America (+5,6% medio annuo) e nel resto del mondo (+5,8%), superiori rispetto a quelle previste sul continente europeo, che comunque presenterà una buona crescita (+3,4%).

Market value in million € by country

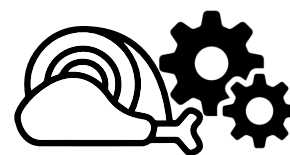


Source: elaboration on FPSA, PMMI, VDMA data

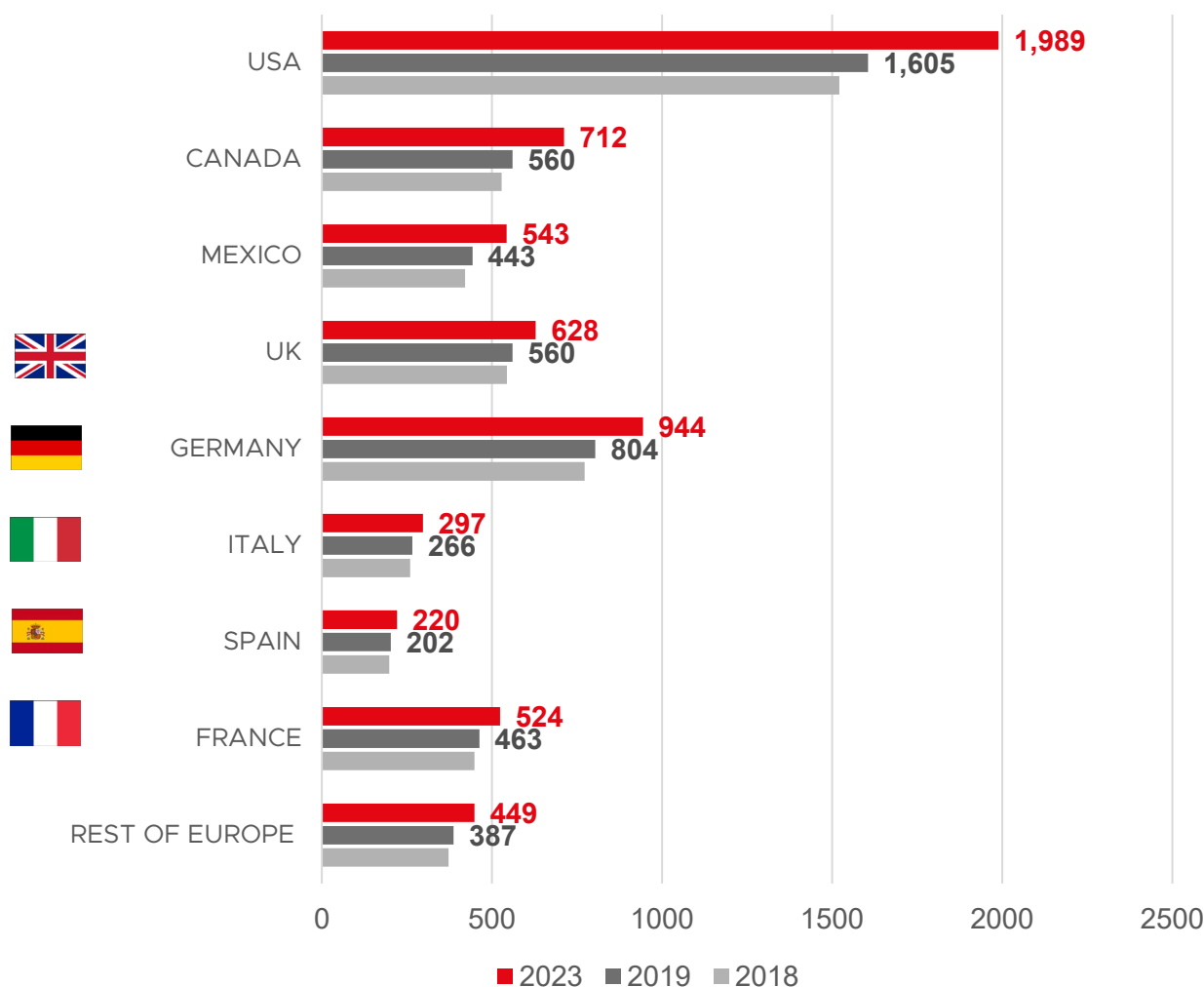
Scendendo a livello di singoli Paesi, nell'area asiatica la lavorazione della carne si concentra soprattutto nel mercato cinese (2,4 mld di euro) e giapponese (1 mld di euro).

I tassi medi annui di crescita più elevati entro il 2023 sono previsti ancora una volta sul mercato cinese (+10,9%), seguito questa volta dal mercato indiano (+10,2%), ancora decisamente più piccolo ma con ottime prospettive di incremento.

Nelle aree europea e nordamericana sono gli USA (1,6 mld di euro) il mercato principale delle tecnologie per la lavorazione della carne, seguiti dalla Germania (0,8 mld di euro) e da Regno Unito e Canada (circa 0,6 miliardi di euro ciascuno).



Market value in million € by country

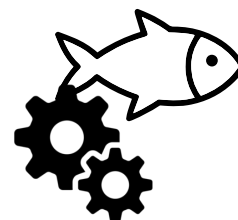


Source: elaboration on FPSA, PMMI, VDMA data

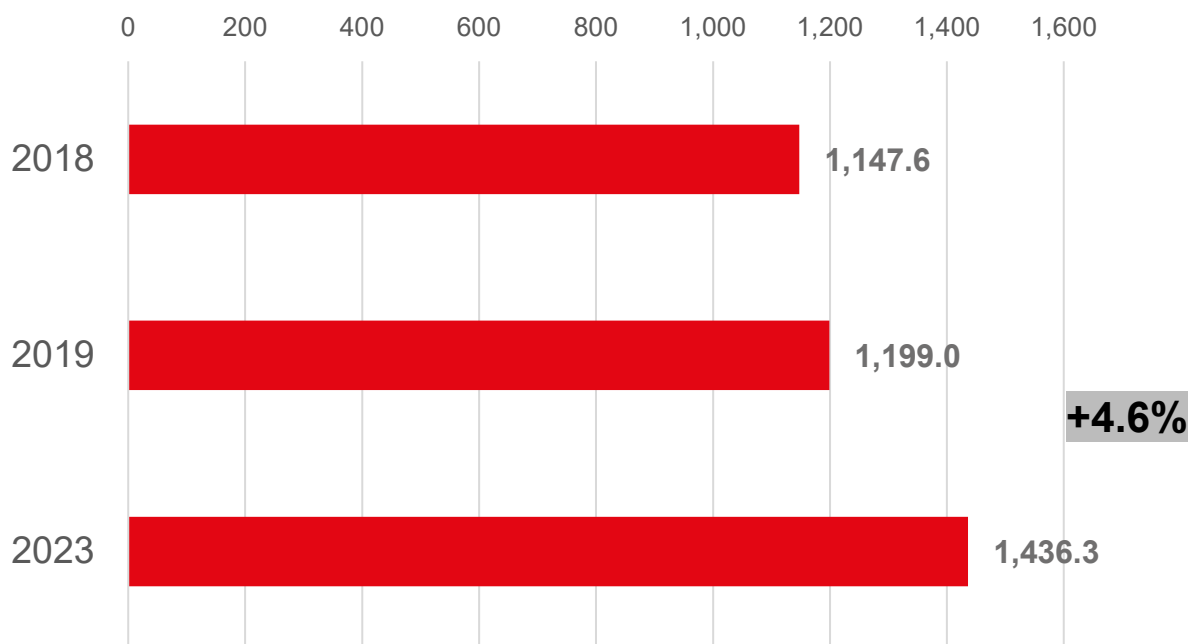
Stati Uniti (+5,5%) e Messico (+5,2%) sono le aree in cui si prevedono gli incrementi medi più elevati entro il 2023. Più conservative le previsioni per l'area europea, trainata dalla crescita del mercato tedesco (+4,1% CAGR al 2023).

Seppure anch'esse collocate in un contesto di crescita elevata, sono più conservative le previsioni per l'area europea, dove a fungere da **traino è il mercato della Germania, con un CAGR del 4,1%** al 2023 che si calcola porterà il valore del **mercato poco sotto il miliardo di euro**. Tra gli altri 23 paesi al centro di questo Monitor, si segnalano i mercati **di Gran Bretagna, Francia, Italia e Spagna, tutti in crescita** e tutti con valori prospettici di un certo interesse per i costruttori di tecnologie di food processing: dai 220 milioni di euro del mercato iberico a 628 milioni di quello oltremarica.

3.3 TECNOLOGIE PESCE

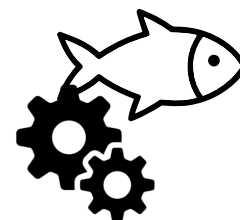


Market value in million € in 2018-2023

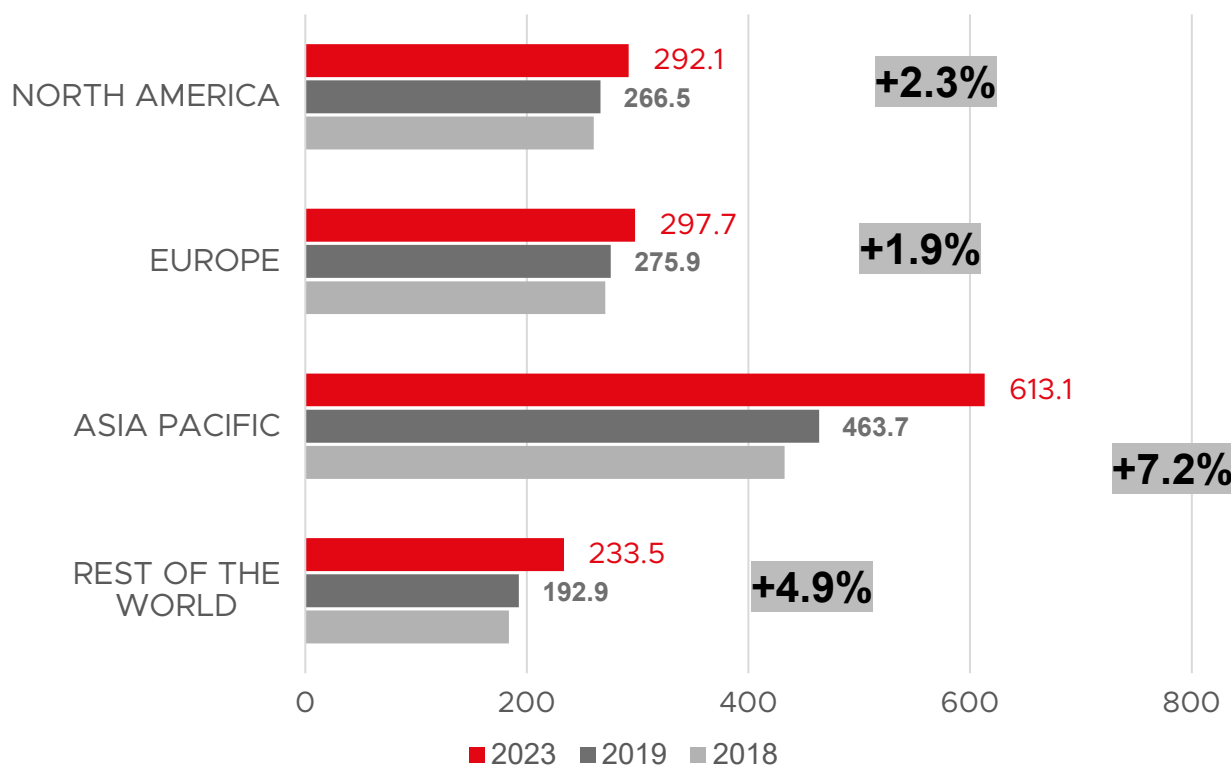


Source: elaboration on FPSA, PMMI, VDMA data

Le tecnologie per la lavorazione del pesce registrano a livello globale un giro d'affari di 1.2 mld di euro, e si prevede che registreranno un incremento medio annuo del 4,6%, un ritmo che porterà il comparto ad un valore totale di 1,4 mld di euro nel 2023.



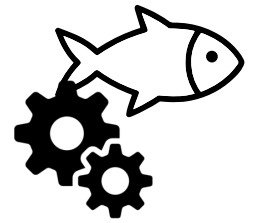
Market value in million € by macroarea



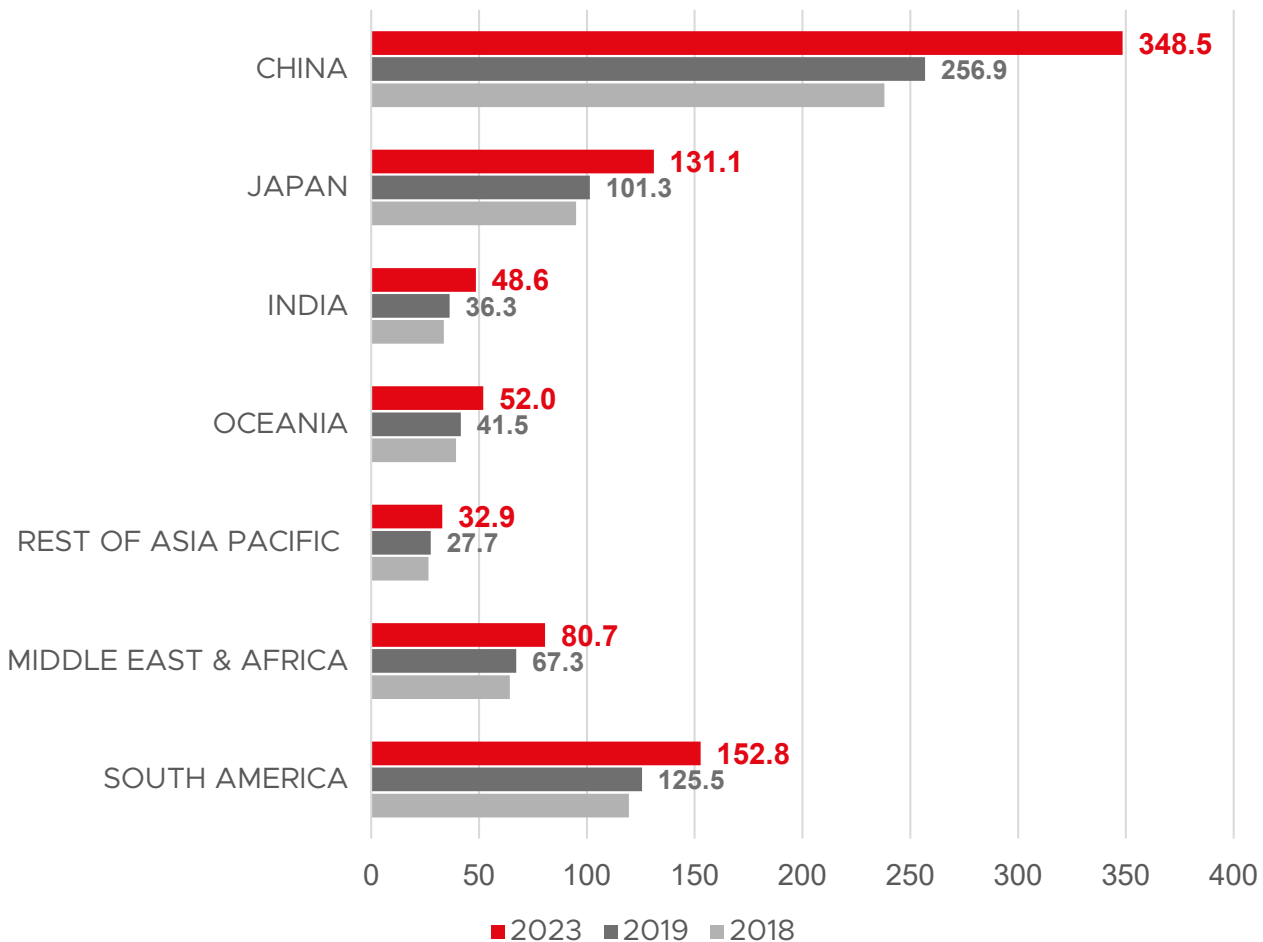
Source: elaboration on FPSA, PMMI, VDMA data

Le tecnologie per la lavorazione del pesce si concentrano nella regione Asia Pacific per il 38,7% (464 mln di euro nel 2019), seguita dalle aree europea e nordamericana rispettivamente con il 23% e il 22,2% delle quote complessive.

L'area asiatica è anche quella che si prevede crescerà con i tassi più elevati da qui al 2023 con un CAGR del 7,2%, arrivando a un volume totale di 613 milioni di euro. Buone le dinamiche nel resto del mondo (+4,9%) ma inferiori risultano quelle previste per il Nord America (+2,3% medio annuo) e per il continente europeo (+1,9%).



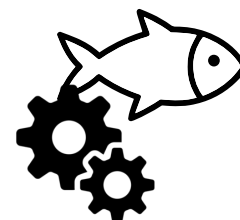
Market value in million € by country



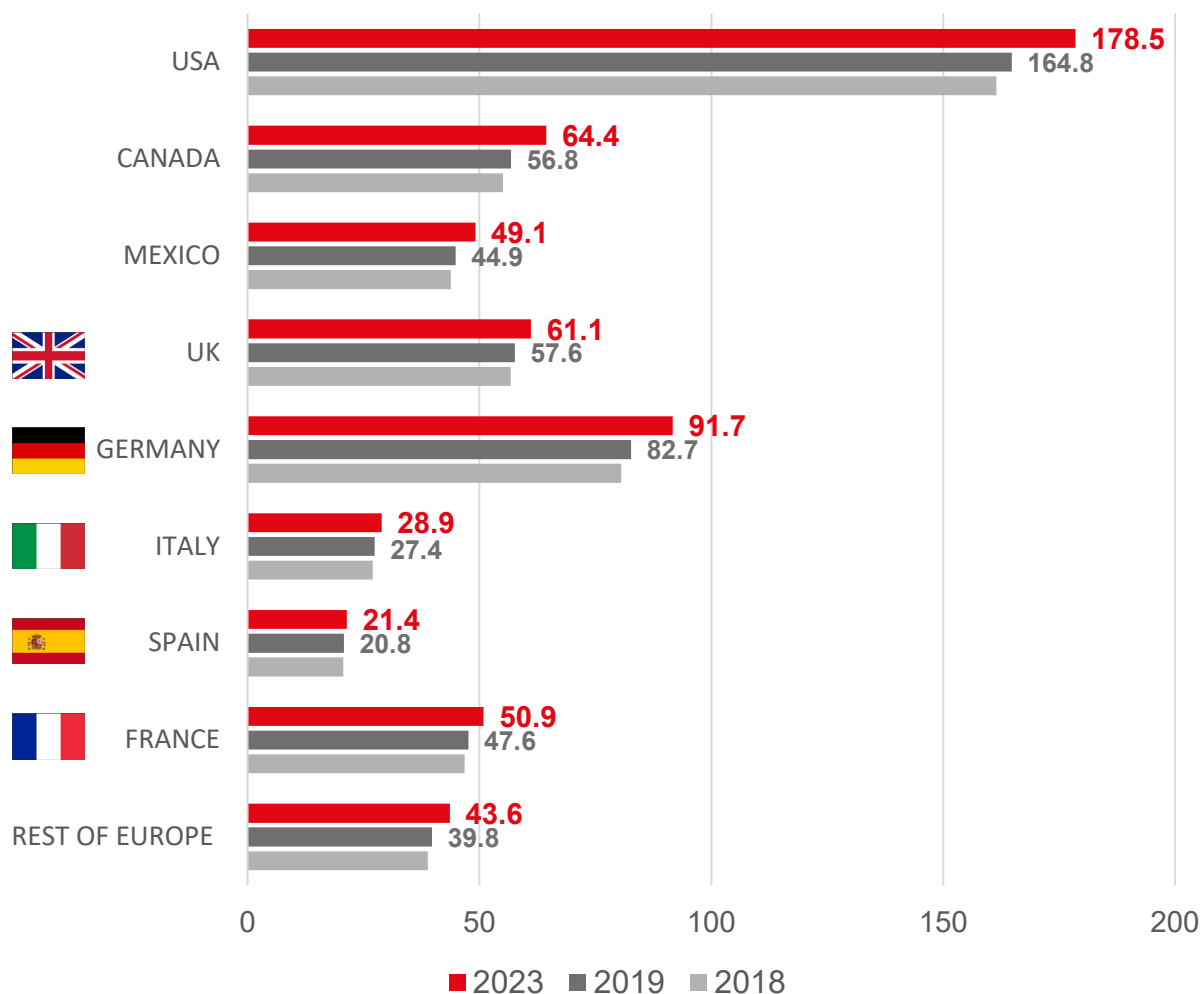
Source: elaboration on FPSA, PMMI, VDMA data

Scendendo a livello di singoli Paesi, nell'area asiatica, come già per la carne, anche le tecnologie per la lavorazione del pesce si concentrano soprattutto nei **mercati cinese (257 mln di euro) e giapponese (101 mln di euro)**.

I tassi medi annui di crescita più elevati entro il 2023 sono previsti ancora una volta sul mercato cinese (+7,9%), seguito questa volta dal mercato indiano (+7,6%), e dal Giappone (+6,6%).



Market value in million € by country

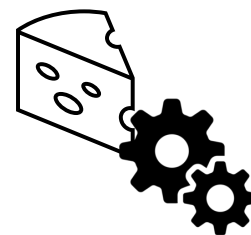


Source: elaboration on FPSA, PMMI, VDMA data

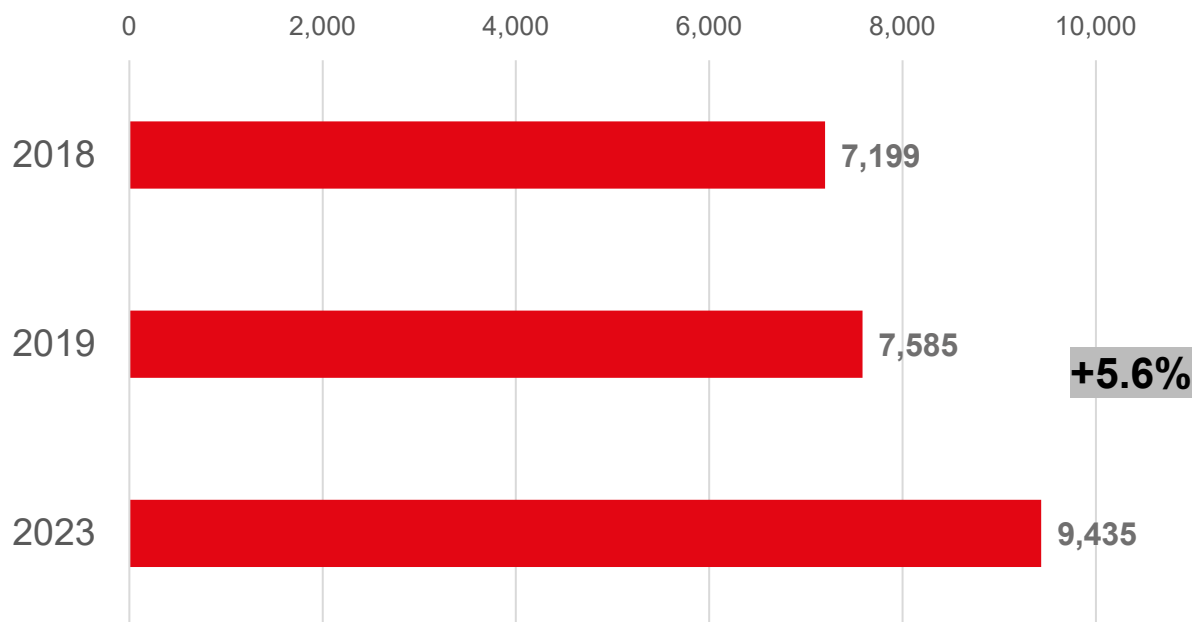
Nelle aree europea e nordamericana sono gli USA (165 mln di euro) il mercato principale delle tecnologie per la lavorazione del pesce, seguito dalla **Germania (83 mln di euro) primo Paese per dimensioni** tra i 23 mercati target.

Canada (+3,2%) e **Germania (+2,6%)** sono le aree in cui si prevedono gli incrementi medi più elevati entro il 2023. Più conservative le previsioni per le altre regioni, ma **anche in mercati come Gran Bretagna, Francia, Italia e Spagna il segmento delle tecnologie fish continuerà a crescere**, aprendo opportunità ulteriori per i costruttori di macchine specializzate.

3.4 TECNOLOGIE DAIRY

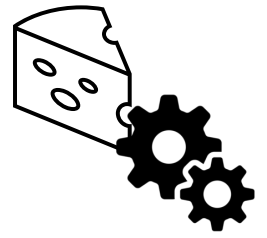


Market value in million € in 2018-2023

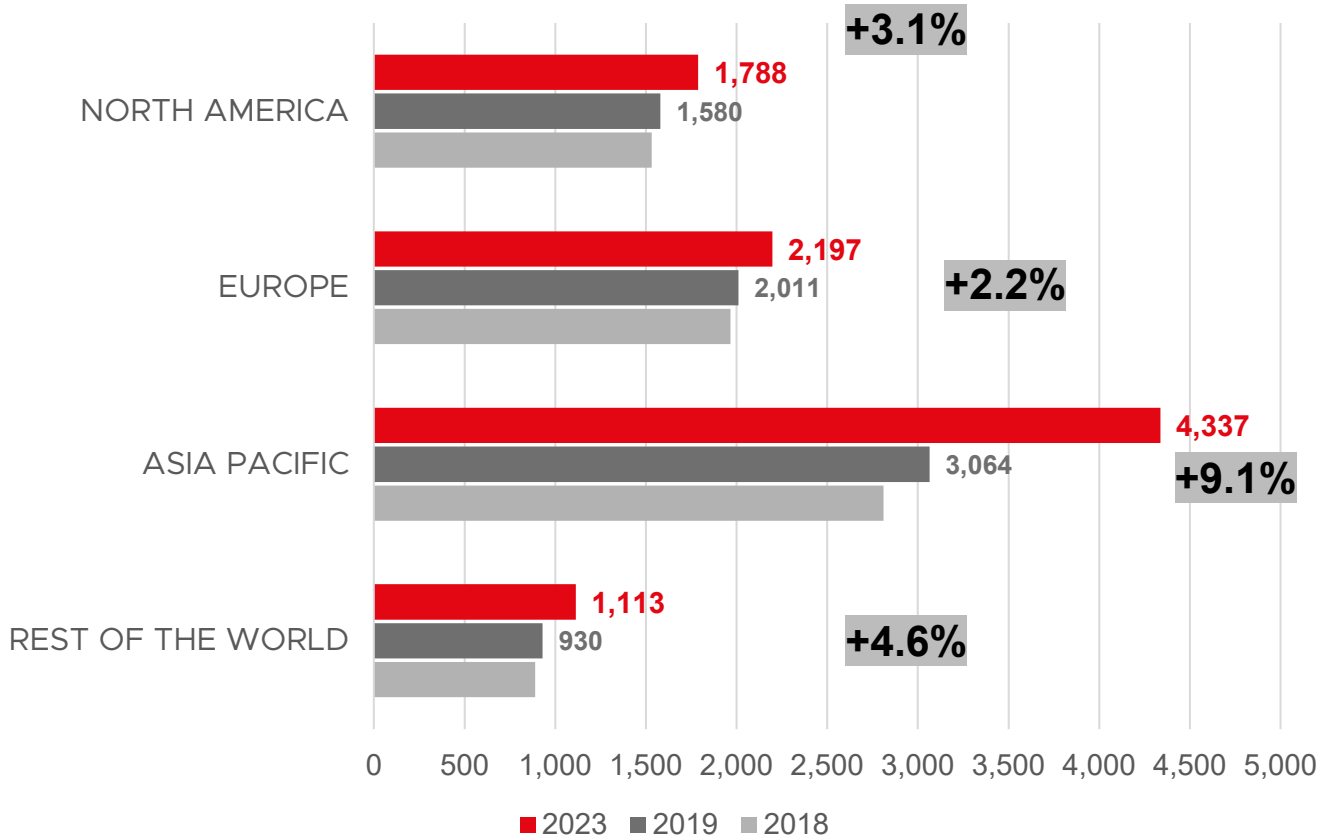


Source: elaboration on FPSA, PMMI, VDMA data

Le **tecnologie per la lavorazione dei prodotti dairy** registrano a livello globale un giro d'affari di 7,6 mld di euro, e si **prevede segneranno un incremento medio annuo del 5,6%**, che porteranno il comparto ad un valore totale di 9,4 mld di euro nel 2023.



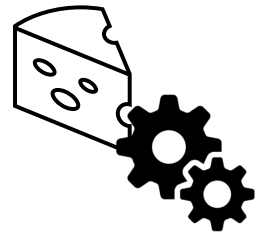
Market value in million € by macroarea



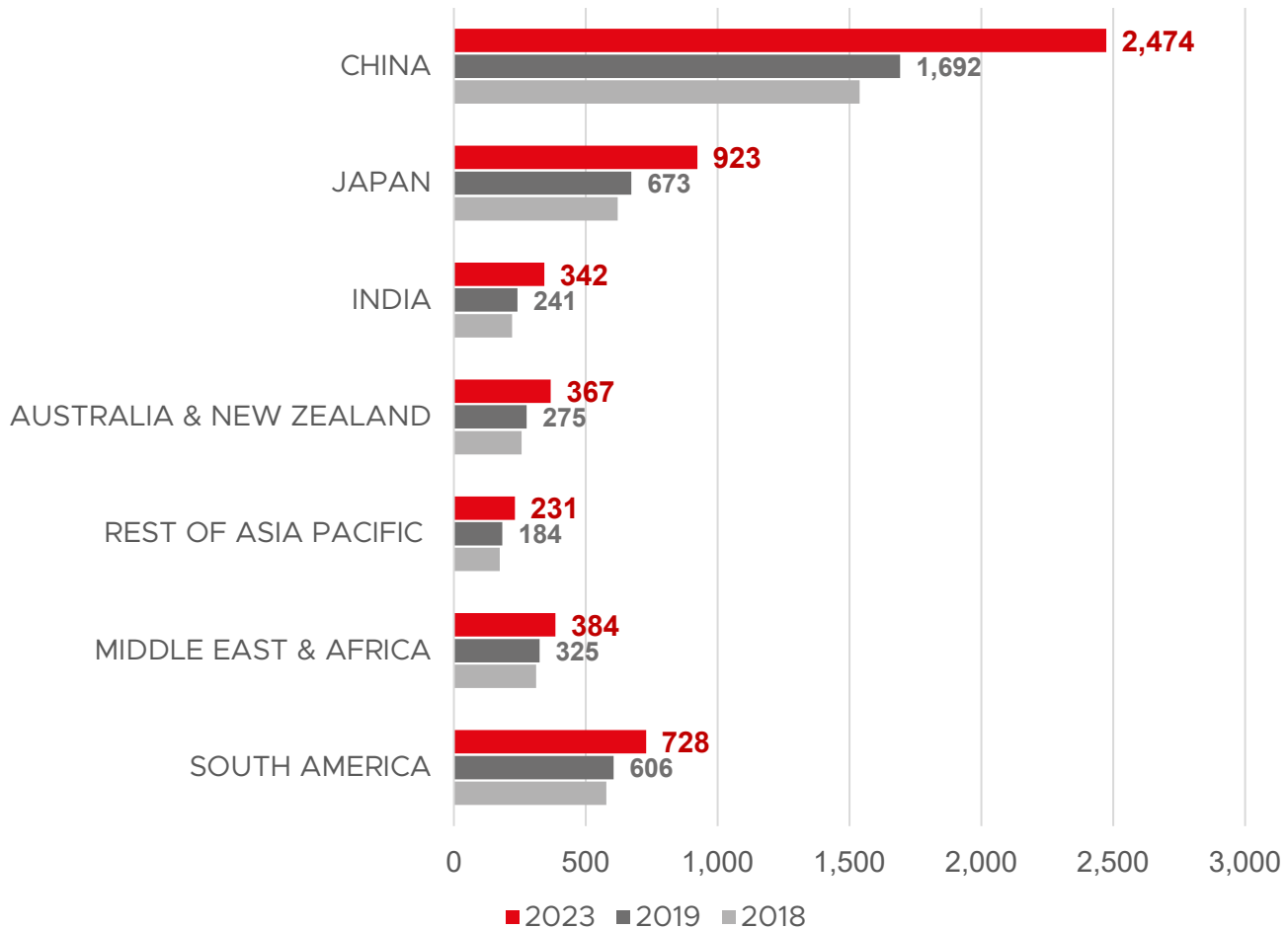
Source: elaboration on FPSA, PMMI, VDMA data

Di nuovo, il grosso del mercato delle tecnologie per la lavorazione dei prodotti dairy si trova nella regione Asia Pacific (le banche dati internazionali non distinguono latte e latticini da formaggi e burro e questo spiega la diversa geografia rispetto ai dati precedentemente visti su produzione e consumi di dairy solido) per il 40,3% del totale mondo, seguita dalle aree europea e nordamericana rispettivamente con il 26,5% e il 20,8% delle quote complessive (2 mld in Europa, 1.6 in Nord America).

L'area asiatica è anche quella che si prevede crescerà con i tassi più alti entro il 2023 (CAGR: 9,1%), arrivando ad un volume totale di 4,3 mld di euro, mentre avanzano ma a un ritmo più contenuto, i mercati occidentali dell'America (+3,1% medio annuo) e dell'Europa (+2,2%).

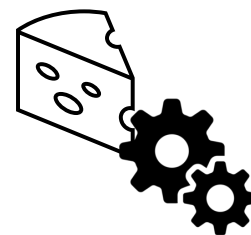


Market value in million € by country

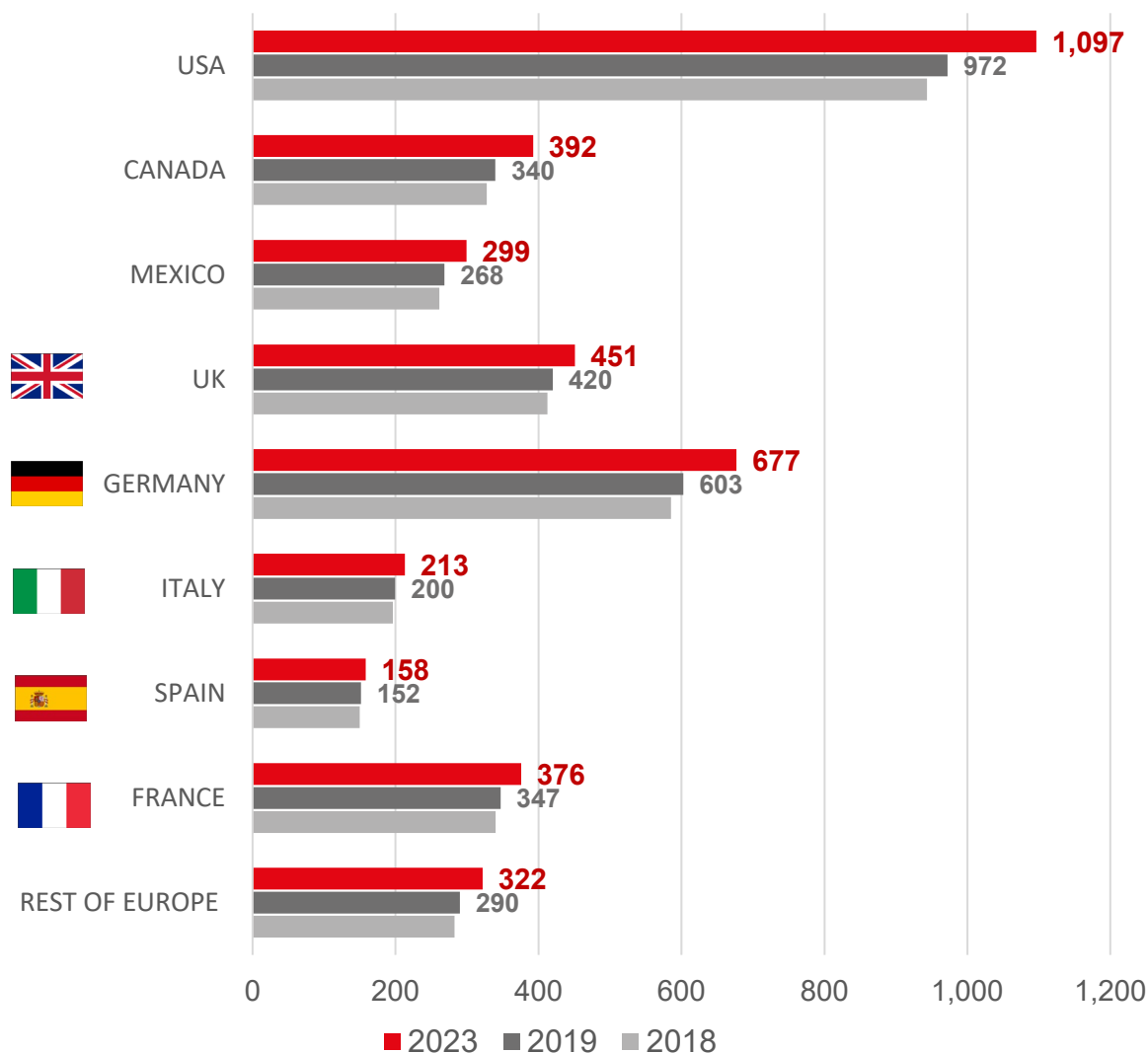


Source: elaboration on FPSA, PMMI, VDMA data

Arrivando poi al dettaglio del singolo Paese, anche nelle tecnologie per il dairy il dominio del bacino asiatico è fuori discussione, con **la Cina che assorbe 1,7 miliardi di euro di macchinari specializzati** ed è il mercato al top della classifica della crescita prevista per il 2023 (CAGR: +10%). Per dinamismo del mercato brillano poi India (+9,2%) e Giappone (+8,2%), un mercato - quello nipponico - da 700 milioni di euro.



Market value in million € by country



Source: elaboration on FPSA, PMMI, VDMA data

Nel versante ovest, invece, sono gli **Stati Uniti il primo mercato delle macchine per il cheese processing, con circa 972 milioni di euro, seguiti dalla Germania, secondo Paese con 600 milioni di euro di valore del mercato**, Gran Bretagna e Francia.

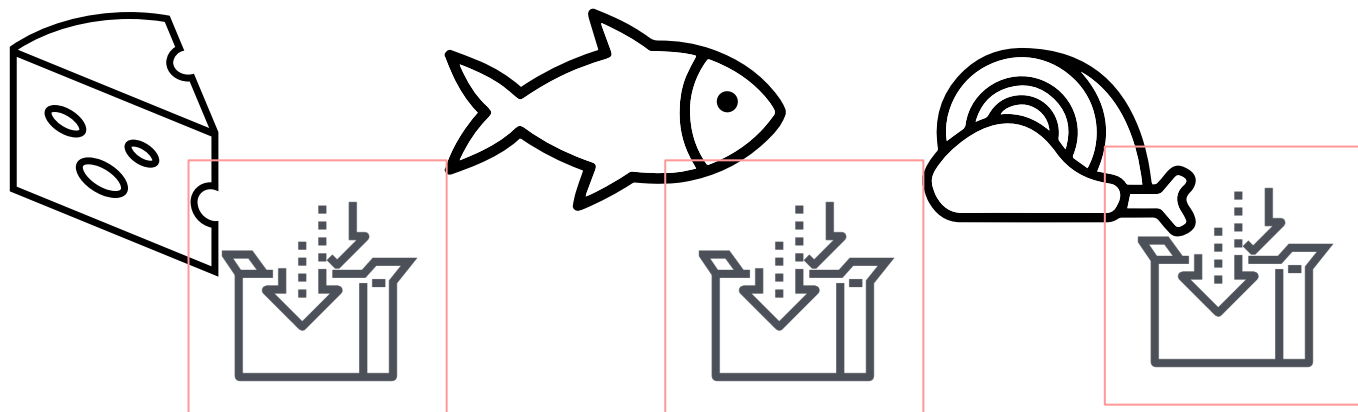
Canada (CAGR: +3,7% al 2023) e Germania (+3%) sono le aree in cui si prevedono gli incrementi medi più elevati entro il 2023. Meno dinamiche le previsioni per gli altri Paesi, ma sono tutte positive, soprattutto nei Paesi target su cui esistono fonti statistiche ufficiali.

4

TECNOLOGIE PER IL PACKAGING ALIMENTARE

FRESH FOOD

MEAT, FISH, DAIRY

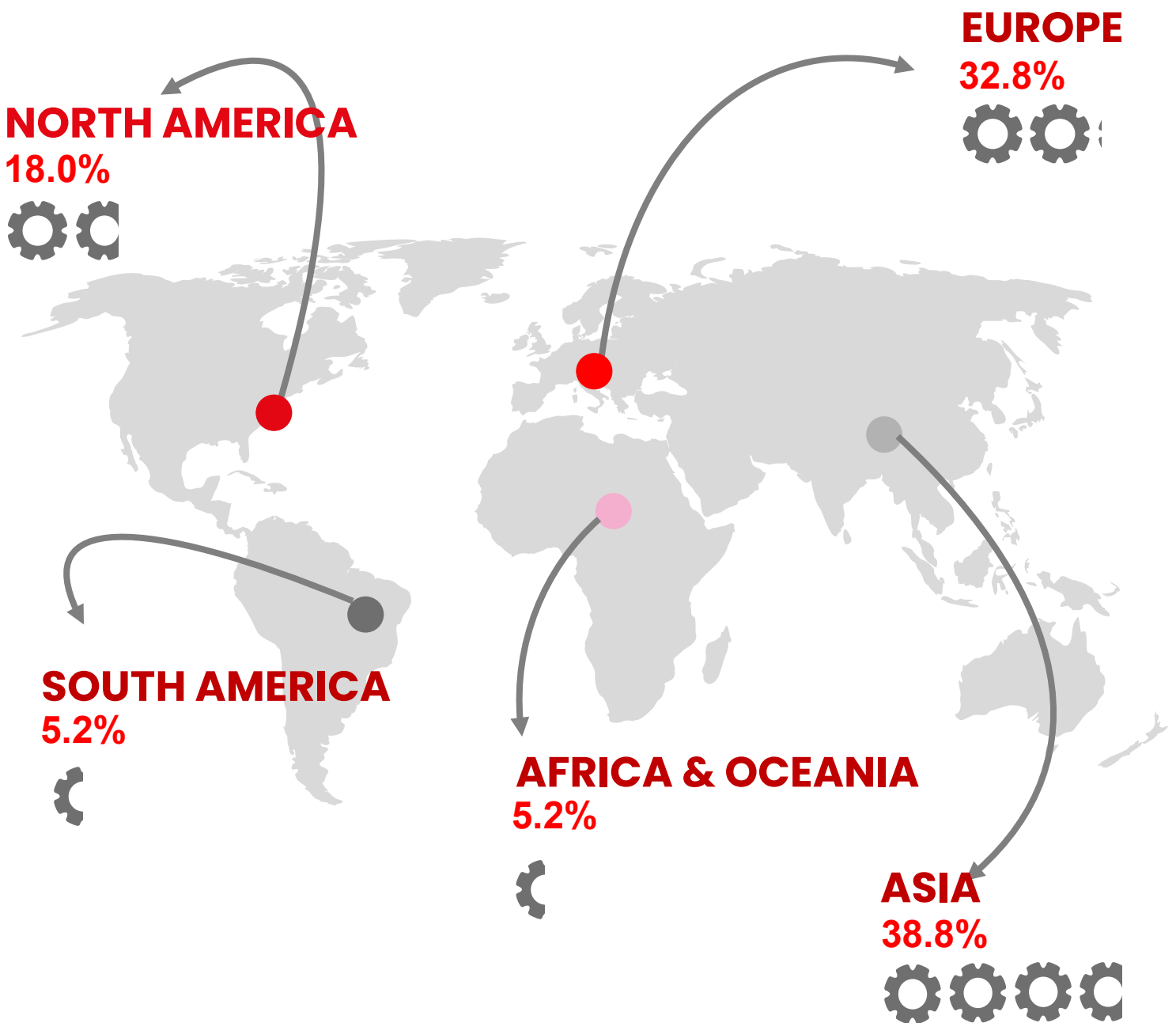


4.1 QUADRO GENERALE

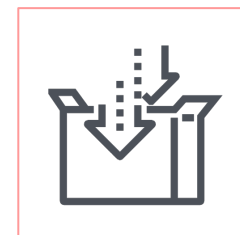


WORLD

2020: 44.5 bln €*



*estimate



Packaging machinery: import value in target countries (mln euro)

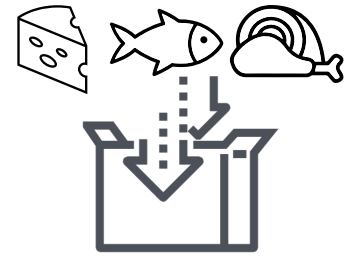
Countries	2018	2019	2020	Share on total import 2020	Var. 20/19
Germany	1,429,275	1,430,244	1,435,037	6.2%	0.3%
France	1,031,692	1,090,215	1,003,719	4.4%	-7.9%
Great Britain	747,899	828,695	860,446	3.7%	3.8%
Spain	663,496	719,725	648,611	2.8%	-9.9%
Poland	599,095	658,991	641,010	2.8%	-2.7%
Italy	498,090	474,236	444,718	1.9%	-6.2%
Switzerland	377,865	382,235	398,734	1.7%	4.3%
Austria	297,229	324,804	318,798	1.4%	-1.8%
Hungary	205,286	216,825	188,210	0.8%	-13.2%
Egypt	178,230	198,836	185,503	0.8%	-6.7%
Ireland	177,195	153,805	182,584	0.8%	18.7%
Romania	183,809	161,613	175,390	0.8%	8.5%
Czech Republic	168,490	184,157	164,518	0.7%	-10.7%
Portugal	133,360	133,243	118,268	0.5%	-11.2%
Serbia	64,077	76,982	112,395	0.5%	46.0%
Bulgaria	47,814	65,125	71,709	0.3%	10.1%
Morocco	85,126	85,603	68,349	0.3%	-20.2%
Slovenia	58,273	57,625	59,144	0.3%	2.6%
Croatia	41,064	57,821	36,661	0.2%	-36.6%
Albania	7,240	6,275	15,463	0.1%	146.4%
Macedonia	10,702	10,281	12,953	0.1%	26.0%
Bosnia	17,796	14,693	9,622	0.0%	-34.5%
Montenegro	3,956	602	225	0.0%	-62.7%
<i>Total Target countries</i>	<i>7,027,057</i>	<i>7,332,634</i>	<i>7,152,066</i>	<i>31.0%</i>	<i>-2.5%</i>
WORLD TOTAL	22,641,048	23,572,905	23,045,619	100.0%	-2.2%

Source: elaboration on ITC data

I Paesi target hanno importato nel 2020 7,1 miliardi di euro di macchine packaging, pari al 31% delle importazioni mondiali complessive, con una variazione del **-2,5%** in linea per altro con la dinamica globale (-2,2%). **Germania, Francia e Gran Bretagna guidano il ranking** dei paesi Importatori.

La maggior parte dei Paesi target oggetto del Monitor sono importatori netti di macchine packaging, con l'eccezione di Germania e Italia, due mercati che esportano macchine packaging per oltre 5 miliardi di euro ciascuno. Con volumi molto inferiori anche Svizzera, Austria, Repubblica Ceca e Slovenia, evidenziano valori di export di macchine packaging superiori a quelli di import, con un saldo positivo che va a beneficio della creazione del valore aggiunto nazionale.

4.2 MACHINE PACKAGING PER FRESH FOOD



Forecast CAGR 2020-23

+2.1%
WORLD

NORTH AMERICA
+0.6%

EUROPE
+2.2%



















SOUTH AMERICA
+1.5%

AFRICA & OCEANIA
+3.1%

ASIA
+2.8%

Packaging Machinery market value in target countries (mln euro)

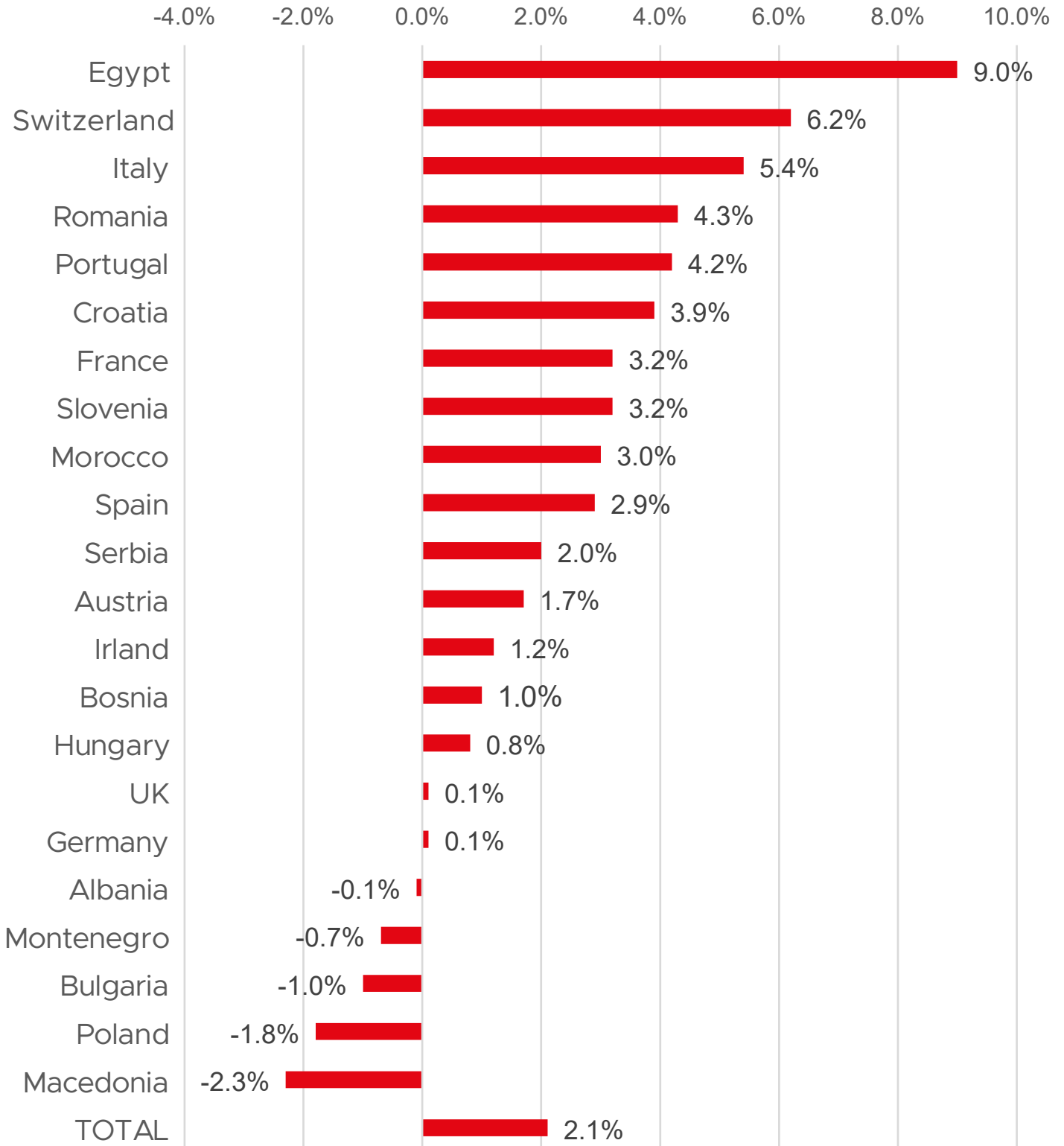
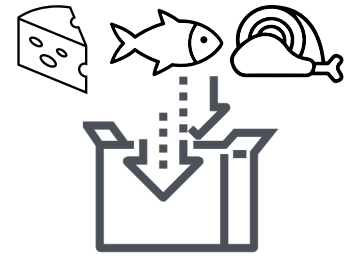


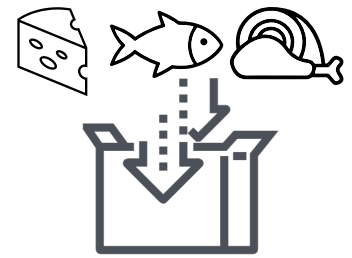
		Market value
	Germany	228.7
	Italy	204.6
	France	134.1
	Great Britain	93.4
	Spain	91.4
	Poland	60.3
	Austria	30.7
	Egypt	18.7
	Switzerland	18.5
	Hungary	17.3
	Ireland	16.1
	Czech Rep.	14.1
	Romania	15.6
	Portugal	11.8
	Morocco	7.5
	Bulgaria	7.1
	Serbia	6.7
	Croatia	5.8
	Slovenia	5.7
	Bosnia	1.3
	Macedonia	0.8
	Albania	0.6
	Montenegro	0.1
	TOTAL	990.9

Il mercato delle macchine packaging per il fresh food nei Paesi target registra un giro d'affari di 991 milioni di euro (su ultimi dati a consuntivo 2019), pari al 25,3% delle tecnologie di confezionamento per il food.

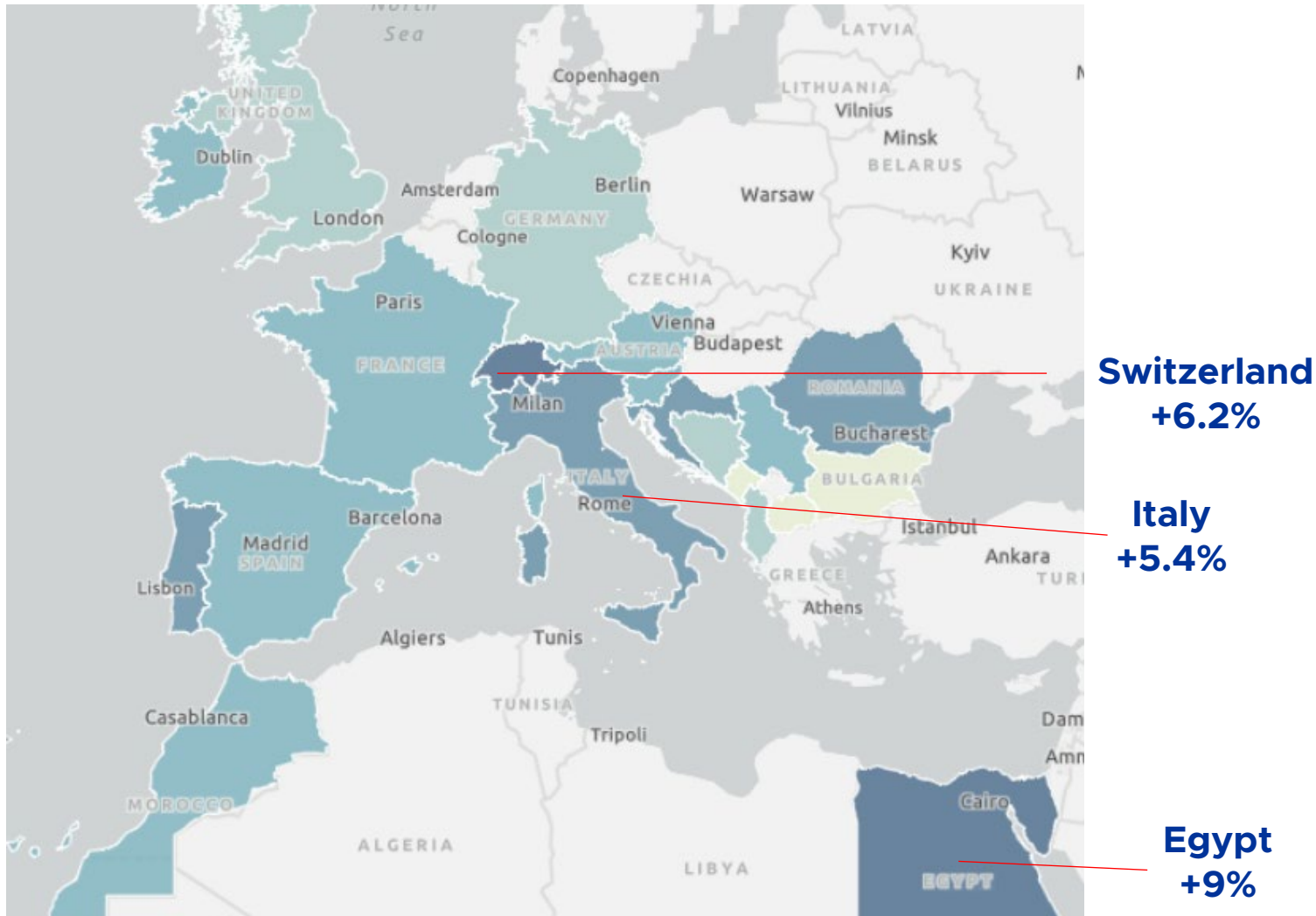
Germania, Italia e Francia sono i mercati più grandi e interessanti per i costruttori di macchine per il confezionamento e l'imballaggio del fresh food. Questi tre da soli rappresentano una quota del mercato target (i 23 Paesi) del 58%.

Packaging machinery forecast in target countries, CAGR 2020-23





Maps of most growing countries CAGR 2020-23



A fronte di un **tasso medio annuo di crescita complessivo dello 2,1% per i Paesi target**, che porterà l'attuale mercato delle macchine packaging per il fresh food a superare il miliardo di euro nel 2023.

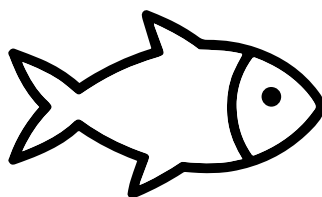
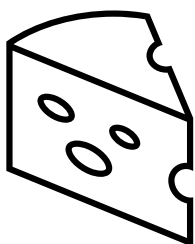
Sono **Egitto e Svizzera i mercati in cui si prevedono i tassi medi annui di crescita più elevati**, con un CAGR rispettivamente del 9% e 6,2% nel periodo 2020-2023.

Buone le performance anche di **Italia (+5.4%), Romania (+4.3%) e Portogallo (+4,2%)**.

5

PRINCIPALI PRODUTTORI

FRESH FOOD
MEAT, FISH, DAIRY





Principali imprese: CARNE

Company name	Cod. NACE	Country	Turnover 2019	Turnover 2018	N. Employees
SOCIETE L D C	1012	France	4,444,342	4,155,594	22,712
BELL FOOD GROUP AG	1011	Switzerland	3,689,519	3,600,501	11,960
BOPARAN HOLDCO LIMITED	1012	Great Britain	2,989,816	3,745,108	20,746
WESTFLEISCH SCE MBH	1013	Germany	2,862,080	2,603,950	4,094
COOPERL ARC ATLANTIQUE	1011	France	2,477,800	2,302,503	7,336
AGRICOLA TRE VALLI - SC	1012	Italy	2,239,980	2,170,560	6,710
INALCA SPA	1010	Italy	2,239,867	2,083,564	3,914
CAMPOFRIO FOOD GROUP, SA	1013	Spain	2,151,123	2,062,824	7,837
CRANSWICK PLC	1013	Great Britain	1,880,926	1,676,362	7,464
MOY PARK LIMITED	1012	Great Britain	1,845,985	1,737,653	10,126
CEDROB S.A.	1013	Poland	1,466,707	1,327,353	n.d.
2 SISTERS FOOD GROUP LIMITED	1012	Great Britain	1,308,721	1,235,637	5,983
EL POZO ALIMENTACION SA	1013	Spain	1,287,314	1,133,134	4,897
PILGRIM'S PRIDE LTD.	1013	Great Britain	1,209,371	1,202,369	5,884
SOKOLOW S.A.	1011	Poland	1,047,304	921,034	n.d.
KERMENE	1011	France	983,841	928,699	2,701
ELIVIA	1011	France	903,663	926,232	n.d.
RIVASAM INTERCONTINENTAL SA	1013	Spain	903,429	635,400	1,187
KARRO FOOD LIMITED	1011	Great Britain	888,660	635,673	3,344
FLETCHER BAY GROUP LIMITED	1011	Great Britain	873,897	815,505	1,746
MARS POLSKA SP. Z O.O.	1011	Poland	863,726	802,860	2,906
INDUSTRIAS CARNICAS LORIENTE PIQUERAS, SA	1013	Spain	844,544	744,011	2,190
BOLTON FOOD SPA	1013	Italy	832,037	840,509	768
FARMERS BOY LIMITED	1013	Great Britain	773,645	772,143	3,245
KEPAK GROUP LIMITED	1011	Great Britain	767,297	519,690	1,400
SOCIETE VITREENNE D'ABATTAGE	1011	France	752,909	800,292	n.d.
FLEURY MICHON	1013	France	747,620	726,023	3,937
LDC SABLE	1012	France	741,177	738,728	2,971
NEEROCK LIMITED	1013	Great Britain	737,457	725,662	2,019
SALUMIFICIO F.LLI BERETTA SPA	1013	Italy	727,191	670,367	1,253
HERTA	1013	France	710,554	659,976	1,698
FLEURY MICHON LS	1013	France	691,602	708,334	2,510
GRANDI SALUMIFICI ITALIANI SPA	1013	Italy	677,578	645,087	1,511
FACCENDA FOODS LIMITED	1012	Great Britain	663,540	677,812	3,588
GALLIANCE VOLAILLE FRAICHE	1012	France	625,127	625,872	n.d.
FRIGORIFICOS COSTA BRAVA SA	1011	Spain	619,505	480,806	1,838
SNV	1012	France	602,060	597,180	2,437
FREEMANS OF NEWENT LIMITED	1012	Great Britain	584,126	177,518	2,472
BAUERNGUT FLEISCH- UND WURSTWAREN GMBH	1013	Germany	580,398	552,576	n.d.
MUELLER FLEISCH GMBH	1011	Germany	578,359	611,932	487
ARRIVE	1012	France	559,873	545,079	2,063
ORIOR AG	1013	Switzerland	549,402	512,061	2,295
MONSTER ENERGY LIMITED	1011	Ireland	547,455	456,632	32
KERRY FOODS LIMITED	1013	Great Britain	517,441	539,018	2,345
2 SISTERS POULTRY LIMITED	1012	Great Britain	496,445	571,070	3,603
AVI.COOP SOC. COOP. AGR.	1012	Italy	495,861	481,832	3,396
EMSLAND FRISCHGEFLUEGEL GMBH	1012	Germany	491,084	482,207	1579
FOYLE FOOD GROUP LIMITED	1011	Great Britain	433,295	401,204	1,284
SUPERDROB S.A.	1012	Poland	416,889	347,393	n.d.



Principali imprese: CARNE

Company name	Cod. NACE	Country	Turnover 2019	Turnover 2018	N. Employees
DROSED S.A.	1013	Poland	408,063	369,850	n.d.
TRADIVAL	1011	France	368,129	331,749	809
CARNIQUES DE JUJA SA	1011	Spain	360,051	294,683	290
ULMER FLEISCH GMBH	1011	Germany	358,947	361,453	297
MARTINI ALIMENTARE S.R.L.	1011	Italy	350,644	315,892	59
SICAREV	1011	France	347,897	403,267	694
ARGAL ALIMENTACION SA.	1013	Spain	339,518	327,655	1,205
CARNJ SOCIETA' COOPERATIVA AGRICOLA	1012	Italy	331,412	309,361	1,659
DELPEYRAT	1013	France	331,272	314,961	1,317
CARNIQUES CELRA SL	1011	Spain	325,683	251,081	24
ALCAR UNO SPA	1011	Italy	316,062	266,097	145
ROVAGNATI SPA	1013	Italy	315,812	297,461	623
LEVONI SPA	1013	Italy	312,708	314,014	548
PROCAVI SL	1011	Spain	312,579	281,904	576
HUBERS LANDHENDL GMBH	1012	Austria	305,842	288,356	850
NOEL ALIMENTARIA SAU	1013	Spain	302,240	277,674	1,100
BROCELIANDE - ALH	1013	France	298,201	273,662	941
CLAI SCA	1010	Italy	286,483	274,081	525
GIUSEPPE CITTERIO SPA	1013	Italy	284,732	267,678	423
FABRICA MATADERO Y DESPIECE SA	1011	Spain	282,381	226,588	580
JOSSELIN PORC ABATTAGE	1011	France	280,275	234,636	581
SUN VALLEY FOODS LIMITED	1013	Great Britain	274,610	434,785	286
SOHI MEAT SOLUTIONS - DISTRIBUICAO DE CARNES, S.A.	1011	Portugal	268,700	267,232	466
SMITHFIELD ROMANIA SRL	1011	Romania	267,090	191,220	2,336
ALL.COOP - SOCIETA' COOPERATIVA AGRICOLA	1013	Italy	266,211	252,303	1,576
CARNICA BATALLE SA	1011	Spain	264,852	216,850	456
MASTER GOOD TERMELO ES KERESKEDELMI KORLATOLT					
FELELOSSEGU TARSASAG	1012	Hungary	263,746	214,012	1,467
COSTA FOOD MEAT S.L.	1011	Spain	253,022	137,823	436
FLEISCHWERK HESSENGUT GMBH	1013	Germany	249,893	238,034	384
PINI Italy S.R.L.	1011	Italy	246,892	221,998	130
TENDRIADE	1011	France	245,709	248,349	587
GATINE VIANDES	1011	France	244,323	218,629	455
LDC BOURGOGNE	1012	France	241,272	248,295	752
MEC-CARNI - SPA	1011	Italy	240,376	243,673	173
INDYKPOL S.A.	1012	Poland	237,912	232,539	785
FRANCE POULTRY	1012	France	236,458	n.d.	427
STORTEBOOM HAMROL SP. Z O.O.	1012	Poland	235,296	206,048	301
SICILIANI SPA - INDUSTRIA LAVORAZIONE CARNE	1010	Italy	235,122	227,307	143
SUINCOM SPA	1011	Italy	234,415	209,943	81
CENTRE ELABORATION DES VIANDES	1012	France	233,532	213,758	933
ZAKLADY MIESNE SKIBA S.A.	1011	Poland	232,875	186,021	962
ANIMEX KUTNO SP. Z O.O.	1011	Poland	232,785	152,831	821
KOSTELECKE UZENINY, A.S.	1013	Czech Rep.	232,616	213,961	n.d.
GHINZELLI S.R.L.	1011	Italy	231,791	242,076	106
MARTELLI F.LLI SPA	1011	Italy	230,888	231,831	138
CARNICAS FRIVALL SL	1011	Spain	230,800	198,067	47
OAKFIELD (FOODS) LIMITED	1013	Great Britain	228,984	227,725	53
AGRO-RYDZYNA SP. Z O.O.	1011	Poland	228,090	176,610	770
LINDEN FOODS LIMITED	1011	Great Britain	226,707	232,865	1,070
VODNANSKA DRUBEZ, A.S.	1012	Czech Rep.	226,090	227,677	n.d.



Principali imprese: CARNE

Company name	Cod. NACE	Country	Turnover 2019	Turnover 2018	N. Employees
LUSIAVES - INDUSTRIA E COMERCIO AGRO-ALIMENTAR SA	1012	Portugal	224,782	226,514	1,084
CPC FOODS LIMITED	1011	Great Britain	223,090	142,820	658
ZAKLAD PRZEMYSLU MIESNEGO BIERNACKI SP. Z O.O.	1011	Poland	220,896	207,193	1,299
AVINATUR PRODUCCIONES AVICOLAS SL.	1013	Spain	217,803	209,072	414
OSI FOOD SOLUTIONS UK LIMITED	1013	Great Britain	217,565	204,781	156
ATELIER FOREZIEN DU FRAIS	1011	France	216,183	204,380	209
COLOMBEROTTO SPA	1010	Italy	213,469	203,697	87
PICK SZEGED SZALAMIGYAR ES HUSUZEM ZARTKORUEN	1013	Hungary	212,170	198,832	n.d.
GROUPE CARNIVOR	1011	France	212,136	179,050	632
Italy ALIMENTARI SPA	1013	Italy	210,560	189,262	312
PIK VRBOVEC PLUS D.O.O.	1013	Croatia	208,185	0	1,094
GRUPO EMPRESARIAL PALACIOS ALIMENTACION SA	1013	Spain	206,686	195,108	504
MOY PARK BEEF ORLEANS	1011	France	206,103	196,422	142
DIRECT TABLE FOODS LIMITED	1011	Great Britain	204,535	184,929	492
S C O	1013	France	201,504	190,201	n.d.
HUNGARY - MEAT FELELOSSEGU TARSASAG	1011	Hungary	201,444	208,651	240
FRESCOS Y ELABORADOS DELISANO SAU	1011	Spain	200,194	217,527	820
"MCS" VAGOVID ZARTKORUEN MUKODO	1011	Hungary	199,636	150,410	761
RUEGENWALDER MUEHLE CARL MUELLER GMBH & CO. KG	1013	Germany	194,192	170,028	620
REWE AUSTRIA FLEISCHWAREN GMBH	1013	Austria	192,238	182,460	n.d.
INDUSTRIAS CARNICAS TELLO SA	1013	Spain	191,438	151,560	797
FAIRFAX MEADOW EUROPE LIMITED	1013	Great Britain	187,999	193,470	571
EXTRA DETAIL LIMITED	1011	Great Britain	185,776	193,675	698
DROBIMEX SP. Z O.O.	1012	Poland	184,787	158,110	422
DOVECOTE PARK LIMITED	1013	Great Britain	184,756	192,594	698
WESTCROWN GMBH	1011	Germany	182,060	155,868	24
PERUTNINA PTUJ REJA PERUTNINE	1012	Slovenia	180,267	166,835	1,436
MESNA INDUSTRIJA BRACA PIVAC D.O.O.	1011	Croatia	179,217	152,180	1,150
KOKA PERADARSKO PREHRAMBENA INDUSTRIJA D.D.	1012	Croatia	175,796	173,912	1,530
PRIMACARNE SL	1013	Spain	173,206	124,949	166
MATADERO FRIGORIFICO AVINYO SA	1011	Spain	170,712	144,384	497
BLOEMER FLEISCH GMBH	1011	Germany	170,251	147,247	332
MA.GE.MA. SOCIETA' AGRICOLA COOPERATIVA	1011	Italy	167,666	153,226	488
DUC	1012	France	164,461	153,083	620
COMPAGNIE LAMPAULAISE DE SALAISON	1013	France	164,065	162,869	539
ZAKLAD MIESNY WIERZEJKI J.M.ZDANOWSCY SP.J.	1011	Poland	163,582	142,890	1,409
SASSI SPA	1011	Italy	161,656	164,166	60
ANHALTINISCHE GEFLUEGELSPEZIALITAETEN GMBH	1012	Germany	161,111	144,641	155
PRZEDSIEBIORSTWO DROBIARSKIE DROBEX - SP. Z O.O.	1012	Poland	160,793	120,731	519
ROLDROB S.A.	1012	Poland	160,624	159,896	792
P P K D.D.	1011	Croatia	159,311	152,316	521
HUNGERIT BAROMFIFELDOLGOZO ES ELELMISZERIPARI	1012	Hungary	159,021	156,291	1,929
ZAKLADY MIESNE LUKOW S.A.	1011	Poland	158,437	147,318	3,269
KONSPOL-BIS SP. Z O.O.	1012	Poland	156,492	149,381	941
COMPAGNIE MADRANGE	1013	France	155,831	150,731	529
CESARE FIORUCCI SPA	1013	Italy	153,970	161,407	411
EMBUTIDOS RODRIGUEZ SL	1011	Spain	151,489	127,610	28
AMI SP. Z O.O. S.K.	1012	Poland	149,227	153,242	n.d.
BERVINI PRIMO S.R.L.	1010	Italy	149,051	151,970	57
OSI FOOD SOLUTIONS SPAIN SL	1013	Spain	148,100	133,439	166



Principali imprese: CARNE

Company name	Cod. NACE	Country	Turnover 2019	Turnover 2018	N. Employees
FIORANI E C. SPA	1010	Italy	147,376	139,702	222
KOMETA 99 ELELMISZERIPARI ZARTKORUEN	1011	Hungary	145,575	140,280	765
KEPAK U.K. LIMITED	1011	Great Britain	144,908	185,435	2
EMBUTIDOS MONTER SOCIEDAD LIMITADA	1011	Spain	144,095	132,346	473
SALAISONS CELTIQUES	1013	France	143,722	128,716	532
IM MATIJEVIC DOO NOVI SAD	1011	Serbia	143,521	137,520	1,777
MCKEEN-BEEF SH SP. Z O.O.	1011	Poland	141,555	150,218	n.d.
SOCIETE AUBRET	1013	France	141,427	141,604	563
UNICARM SRL	1013	Romania	141,072	143,022	2,900
LES VOLAILLES DE KERANNA	1012	France	140,750	141,787	416
GREISINGER GMBH	1013	Austria	140,538	135,474	550
NIK-POL SP. Z O.O.	1013	Poland	135,865	120,683	374
WEDLINKA SP. Z O.O. S.K.	1011	Poland	134,662	97,261	36
PILCO EOOD	1012	Bulgaria	133,714	132,577	932
ALEJANDRO MIGUEL SOCIEDAD LIMITADA	1011	Spain	133,106	107,156	269
DAVID WOOD BAKING LIMITED	1013	Great Britain	132,993	110,134	1,426
ZAKLADY MIESNE SILESIA S.A.	1013	Poland	131,062	130,336	1,548
MONTE D'ALVA - ALIMENTACAO, S.A.	1011	Portugal	130,274	118,788	742
FIPSO INDUSTRIE	1011	France	128,395	123,517	292
FERRARINI SPA	1013	Italy	126,759	138,872	297
MARTIN-BROWER IRELAND LIMITED	1011	Ireland	125,825	119,568	105
BOROWSKI INVESTMENTS SP. Z O.O. S.K.A.	1013	Poland	125,486	110,766	n.d.
GAFOOR PURE HALAL LTD	1013	Great Britain	125,074	115,395	319
RIGAMONTI SALUMIFICIO SPA	1013	Italy	124,960	n.d.	195
VILLANI SPA	1013	Italy	124,908	120,397	229
VERONI SPA	1013	Italy	123,451	121,892	297
OSI FOOD SOLUTIONS POLAND SP. Z O.O.	1011	Poland	122,868	109,399	n.d.
AAYLEX PROD S.A.	1012	Romania	122,654	117,265	921
MATADERO COMARCAL DEL BAGES, S.L.	1011	Spain	122,001	93,461	55
MEISTER FEINES FLEISCH FEINE WURST GMBH	1013	Germany	120,769	102,132	250
ETABLISSEMENTS PUIGRENIER	1011	France	120,502	120,498	377
TRANZIT-FOOD BAROMFIFELDOLGOZO	1013	Hungary	119,749	130,404	n.d.
EMBUTIDOS MONELLS SA	1013	Spain	119,666	116,080	345
SAS GUILLET	1012	France	117,990	116,383	421
ZAKLAD DROBIARSKI W STASINIE SP. Z O.O.	1012	Poland	117,323	87,667	311
C.A.F.A.R. SOCIETA' AGRICOLA COOPERATIVA	1012	Italy	116,057	105,292	845
ARAGONESA DE PIENSOS, SA	1011	Spain	114,936	103,400	139
BAYREUTHER FLEISCH GMBH	1011	Germany	114,365	122,131	63
PLUKON SIERADZ SP. Z O.O.	1012	Poland	113,474	66,561	n.d.
SOC VIOL FRERES	1011	France	112,016	100,507	289
PPHU MARK'S SP. Z O.O.	1011	Poland	112,010	88,987	268
MATADERO FRIGORIFICO DEL CARDONER SA	1011	Spain	111,921	102,045	216
GALLICOOP PULYKAFELDOLGOZO	1012	Hungary	111,582	107,433	n.d.
YER BREIZH	1012	France	111,417	56,824	97
NOBRE ALIMENTACAO, LDA	1013	Portugal	110,820	110,187	757
GLOBALCARNI SPA	1011	Italy	110,710	119,349	52
MADEJ WROBEL SP. Z O.O.	1013	Poland	109,585	118,454	205
AGRICOLA INTERNATIONAL SA	1012	Romania	108,432	105,841	2,012
FRIGORIFICOS UNIDOS SA	1011	Spain	108,015	93,072	115
CENTRO CARNI COMPANY SPA	1010	Italy	107,012	101,597	96



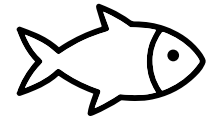
Principali imprese: CARNE

Company name	Cod. NACE	Country	Turnover 2019	Turnover 2018	N. Employees
OLIVIERI SPA	1010	Italy	106,803	106,699	93
DONEGAL MEAT PROCESSORS UNLIMITED COMPANY	1011	Ireland	106,322	106,189	236
PROCANAR	1012	France	105,408	112,795	444
INDUSTRIAS CARNICAS MONTRONILL SA	1011	Spain	105,183	91,168	85
ELIT SRL	1011	Romania	103,807	89,936	1,482
CAROLI FOODS GROUP SRL	1013	Romania	103,756	98,016	1,010
LES FERMIERS LANDAIS	1012	France	103,350	102,576	388
NOVAFRIGSA SA	1011	Spain	103,089	97,792	292
FIRMA KABANOS KOJS	1011	Poland	101,575	91,636	n.d.
OSI POLAND FOODWORKS SP. Z O.O.	1011	Poland	101,446	95,106	177
CIM ALIMENTARI - SPA	1013	Italy	101,396	116,172	106
POLSKIE MIESO I WEDLINY LUKOSZ SP. Z O.O.	1013	Poland	101,322	85,895	686
SEDIASA ALIMENTACION SA	1011	Spain	101,193	114,916	248
RECUNOSTINTA PRODCOM IMPEX SRL	1013	Romania	100,816	100,811	982
MASO UZENINY POLICKA, A.S.	1011	Czech Rep.	100,428	87,994	n.d.
RASPINI SPA	1013	Italy	100,378	88,920	254
SALUMIFICIO F.LLI COATI SPA	1011	Italy	100,356	84,877	132
KEPAK KIRKHAM LIMITED	1013	Great Britain	99,543	91,915	469
FACCIA FRATELLI S.R.L.	1011	Italy	99,260	96,129	50
ADROS SP. Z O.O.	1012	Poland	98,779	91,462	394
ETS PRUVOST LEROY	1011	France	98,459	93,111	n.d.
HOCHREITER FLEISCHWAREN GMBH	1013	Austria	98,362	n.d.	242
WILHELM BRANDENBURG GMBH & CO. OHG	1013	Germany	n.d.	n.d.	n.d.
WESTFALENLAND FLEISCHWAREN GMBH	1013	Germany	n.d.	n.d.	n.d.
AOSTE SNC OU A SNC	1013	France	n.d.	n.d.	n.d.
LOEUL-PIRIOT	1011	France	n.d.	n.d.	n.d.
EGYPTIAN FREEZING & PROCESSING CO.S.A.E.	1011	Egypt	n.d.	n.d.	n.d.
ZAKLADY MIESNE SKIBA ANDRZEJ SKIBA	1011	Poland	n.d.	n.d.	n.d.
ERNEST SOULARD	1012	France	n.d.	n.d.	n.d.
ANIMEX K4 SP. Z O.O.	1011	Poland	n.d.	488,680	n.d.
JBB IMPORT - EKSPORT JOZEF BALDYGA	1013	Poland	n.d.	200,520	n.d.
SOBEVAL	1011	France	n.d.	183,847	n.d.
ZAKRZEWSKY S.J.	1011	Poland	n.d.	154,969	n.d.
ZAKLADY MIESNE SZUBRYT ZBIGNIEW SZUBRYT	1013	Poland	n.d.	109,633	n.d.
OSI FOOD SOLUTIONS AUSTRIA GMBH & CO KG	1013	Austria	n.d.	103,602	n.d.
SOCOPA VIANDES	1011	France	n.d.	n.d.	5,551
SERVICARNE S.C. CL	1011	Spain	n.d.	n.d.	5,323
CRANSWICK COUNTRY FOODS PLC	1011	Great Britain	n.d.	1,132,229	3,802
GROUPE BIGARD	1011	France	n.d.	n.d.	3,704
CHARAL	1011	France	n.d.	n.d.	2,917
ANGLO BEEF PROCESSORS UK	1011	Great Britain	n.d.	n.d.	1,994
CRANSWICK CONVENIENCE FOODS LIMITED	1013	Great Britain	n.d.	504,527	1,960
PIK VRBOVEC-MESNA INDUSTRIJA, D.D.	1013	Croatia	n.d.	246,645	1,804
AVARA FOODS	1011	Great Britain	n.d.	n.d.	1,800
DUNBIA (UK)	1013	Great Britain	n.d.	541,764	1,703
FORZA FOODS LIMITED	1013	Great Britain	n.d.	292,340	1,587
BERNARD MATTHEWS FOODS LIMITED	1013	Great Britain	n.d.	219,340	1,486
BELL DEUTSCHLAND GMBH & CO. KG	1013	Germany	n.d.	424,056	1,182
EURALIS GASTRONOMIE	1013	France	n.d.	340,460	1,155
J.W. GALLOWAY LIMITED	1013	Great Britain	n.d.	430,348	1,094



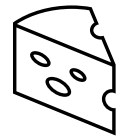
Principali imprese: CARNE

Company name	Cod. NACE	Country	Turnover 2019	Turnover 2018	N. Employees
HILTON FOODS UK LIMITED	1013	Great Britain	n.d.	550,876	1,092
FARMERS BOY DEESIDE	1011	Great Britain	n.d.	n.d.	1,000
COOP OURENSANAS S. C. GALEGA	1013	Spain	n.d.	572,584	1,000
A B P	1011	Great Britain	n.d.	n.d.	950
DUNBIA (NORTHERN IRELAND)	1011	Great Britain	n.d.	266,621	938
BANHAM POULTRY LIMITED	1013	Great Britain	n.d.	n.d.	906
SCOTBEEF LIMITED	1013	Great Britain	n.d.	377,758	891
MP KRASNO, A.S.	1013	Czech Rep.	n.d.	99,883	871
RONARD	1012	France	n.d.	n.d.	839
ELABORADOS CARNICOS MEDINA SAU	1013	Spain	n.d.	334,361	829
WESTERN BRAND POULTRY PRODUCTS LIMITED	1012	Ireland	n.d.	128,224	760
HAME, S.R.O.	1013	Czech Rep.	n.d.	196,295	724
VION FOOD NORTH GMBH	1011	Germany	n.d.	1,036,075	708
DUNBIA (PRESTON) LIMITED	1011	Great Britain	n.d.	295,095	701
WALKERS MIDSHIRE FOODS	1011	Great Britain	n.d.	n.d.	700
MORRISONS COLE	1011	Great Britain	n.d.	n.d.	700
SAVIEL FRANCE	1011	France	n.d.	n.d.	676
KOBER LIMITED	1013	Great Britain	n.d.	134,938	660
MEGA DAS FACH-ZENTRUM FUER DIE METZGEREI E.G.	1013	Germany	n.d.	171,631	655
SOCIETE BERNARD	1011	France	n.d.	448,113	650
EMIL FAERBER GMBH & CO. KG	1013	Germany	n.d.	179,976	608
SALISBURY POULTRY (MIDLANDS) LIMITED	1012	Great Britain	n.d.	129,799	600
ABP POLAND SP. Z O.O.	1011	Poland	n.d.	173,296	557
ABBELEN GMBH	1013	Germany	n.d.	n.d.	552
DUNBIA (ENGLAND)	1011	Great Britain	n.d.	204,915	549
WESTERN BRAND GROUP UNLIMITED COMPANY	1012	Ireland	n.d.	106,094	507
FRISLVA SA	1011	Spain	n.d.	255,374	497
DUNBIA (WALES)	1011	Great Britain	n.d.	146,983	477
FRIBIN S. A. T. N. 1269 R. L.	1011	Spain	n.d.	279,056	463
GREEN LABEL FOODS LTD.	1013	Great Britain	n.d.	128,865	459
GEDESCO SA	1013	Spain	n.d.	103,413	455
G+G CONVENIENCE PRODUKTE GMBH & CO. KG	1012	Germany	n.d.	115,084	447
INDUSTRIAS FRIGORIFICAS DEL LOURO, SA	1011	Spain	n.d.	n.d.	437
PLUKON BRENZ GMBH	1012	Germany	n.d.	137,562	412
RADATZ - FEINE WIENER FLEISCHWAREN GMBH	1013	Austria	n.d.	176,061	400
LE & CO - ING. JIRI LENC, S.R.O.	1013	Czech Rep.	n.d.	n.d.	375
PLUKON STORKOW GMBH	1012	Germany	n.d.	120,218	372
ETABLISSEMENTS ABERA	1011	France	n.d.	n.d.	349
ASTENHOF FRISCHGEFLUEGEL GMBH	1012	Germany	n.d.	111,030	345
HEIDEMARK MAESTERKREIS GMBH & CO. KG	1011	Germany	n.d.	n.d.	337
PLUKON VISBEK GMBH	1013	Germany	n.d.	101,359	320
FLEISCHWAREN BERGER GESELLSCHAFT M.B.H. & CO.KG.	1011	Austria	n.d.	144,557	310
PICKSTOCK TELFORD LIMITED	1013	Great Britain	n.d.	108,117	309
CRANSWICK COUNTRY FOODS (BALLYMENA)	1011	Great Britain	n.d.	109,017	308
GRAEFENDORFER GEFLUEGEL- UND TIEFKUEHLFEINKOST	1013	Germany	n.d.	176,274	282
SIMON FLEISCH GMBH	1011	Germany	n.d.	185,690	281
MAFRIGES SA	1011	Spain	n.d.	129,804	276
WILLMS FLEISCH GMBH	1013	Germany	n.d.	229,552	265
GRUP BAUCELLS ALIMENTACIO SL	1011	Spain	n.d.	n.d.	257
PLUKON GUDENSBERG GMBH	1012	Germany	n.d.	105,910	248



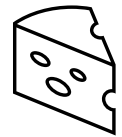
Principali imprese: PESCE

Company name	Cod. NACE	Country	Turnover 2019	Turnover 2018	N. Employees
YOUNG'S SEAFOOD LIMITED	1020	Great Britain	919,609	614,940	2,217
FRINSA DEL NOROESTE SA	1020	Spain	525,027	508,698	1,395
CONSERVAS RIANXEIRA SA.	1020	Spain	450,814	425,239	900
ESCURIS SL	1020	Spain	405,342	406,641	370
DELABLI	1020	France	374,232	378,232	1,153
GREENLAND SEAFOOD WILHELMSHAVEN GMBH	1020	Germany	368,747	273,316	374
CAMPOFRIO FOOD GROUP, SA	1020	France	355,768	350,885	1,641
CAPITAINE HOUAT	1020	France	313,987	305,056	n.d.
FROZEN FISH INTERNATIONAL GMBH	1020	Germany	293,098	285,237	674
FIORITAL SPA	1020	Italy	290,350	289,083	309
FINDUS FRANCE	1020	France	251,266	253,076	327
MILAREX SP. Z O.O.	1020	Poland	229,375	203,624	n.d.
SUEMPOL SP. Z O.O.	1020	Poland	220,188	170,220	520
BOLTON FOOD SL.	1020	Spain	201,832	213,409	523
CALVO CONSERVAS SL	1020	Spain	191,289	193,073	496
NEW ENGLAND SEAFOOD INTERNATIONAL LIMITED	1020	Great Britain	187,304	174,786	725
LISNER POZNAN SP. Z O.O. S.K.	1020	Poland	186,626	170,266	944
BOLTON FOOD	1020	France	177,372	204,995	374
FROSTA SP. Z O.O.	1020	Poland	164,623	145,225	641
RIBERALVES - COMERCIO E INDUSTRIA DE PRODUTOS ALIMENTARES, S.A.	1020	Portugal	163,791	155,425	473
ESPERSEN POLSKA SP. Z O.O.	1020	Poland	155,865	130,630	1,026
NORFISK GMBH	1020	Germany	144,431	115,945	71
LYONS SEAFOODS LIMITED	1020	Great Britain	134,361	129,655	327
GENERALE CONSERVE SPA	1020	Italy	127,186	129,030	666
BG PRODUCTION SP. Z O.O.	1020	Poland	121,336	78,494	168
FARNE SALMON & TROUT LIMITED	1020	Great Britain	119,929	128,993	678
KORAL S.A.	1020	Poland	118,816	110,111	432
NINO CASTIGLIONE S.R.L.	1020	Italy	112,140	101,141	235
HILTON FOODS LTD SP. Z O.O.	1020	Poland	108,679	111,917	570
AQUALANDE	1020	France	108,299	102,288	634
PAULA FISH SLAWOMIR GOJDZ S.J.	1020	Poland	106,922	n.d.	n.d.
ESPERSEN KOSZALIN SP. Z O.O.	1020	Poland	104,366	80,452	741
SALICA INDUSTRIA ALIMENTARIA SA	1020	Spain	103,299	104,553	224
FORMEC BIFFI SPA	1020	Italy	100,699	96,253	179
MOWI POLAND S.A.	1020	Poland	n.d.	852,014	3,569
MOWI BOULOGNE	1020	France	n.d.	207,713	218
SCOTTISH SALMON COMPANY PLC (THE)	1020	Great Britain	n.d.	199,718	607
INTERNATIONAL SEAFOODS LIMITED	1020	Great Britain	n.d.	187,780	605
MOWI CONSUMER PRODUCTS UK LIMITED	1020	Great Britain	n.d.	185,627	397
SEAFRESH GROUP (HOLDINGS) LIMITED	1020	Great Britain	n.d.	167,939	385
ESCAL ESCARGOT D'ALSACE	1020	France	n.d.	n.d.	166
LASCHINGER-GMBH	1020	Germany	n.d.	n.d.	n.d.
HAIKUI SEAFOOD AG	1020	Germany	n.d.	n.d.	1,385
CRUSTA C	1020	France	n.d.	n.d.	139
FRAIS EMBAL	1020	France	n.d.	111,944	169



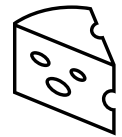
Principali imprese: DAIRY

Company name	Cod. NACE Country	Turnover 2019	Turnover 2018	N. Employees
DANONE	1051 France	25,298,000	24,711,000	102,449
PARMALAT SPA	1051 Italy	6,923,900	6,289,500	26,511
SAVENCIA SA	1051 France	5,485,787	5,287,287	20,031
GLANBIA PLC	1051 Ireland	3,875,700	3,170,500	4,542
BEL	1051 France	3,405,153	3,312,326	12,438
EMMI AG	1051 Switzerland	3,215,860	3,069,942	7,826
ARLA FOODS LIMITED	1051 Great Britain	2,883,502	2,905,729	3,439
ALTAREIT	1051 France	2,882,500	2,196,600	n.d.
MULLER UK & IRELAND GROUP LLP	1051 Great Britain	2,226,654	2,150,029	7,262
DANONE PRODUITS FRAIS FRANCE	1051 France	1,409,964	1,447,389	2,347
GRANAROLO SPA	1051 Italy	1,330,785	1,316,487	2,772
SPOLDZIELNIA MLECZARSKA MLEKOVITA	1051 Poland	1,220,804	1,092,090	3,609
CANDIA	1051 France	1,192,065	1,225,713	1,498
ENTREMONT ALLIANCE	1051 France	1,104,057	1,101,983	1,600
SPOLDZIELNIA MLECZARSKA MLEKPOL W GRAJEWIE	1051 Poland	1,012,106	947,027	2,732
MOLKEREI AMMERLAND EG	1051 Germany	1,010,204	920,161	495
BERGLANDMILCH EGEN	1051 Austria	946,274	943,183	n.d.
EGIDIO GALBANI SRL	1051 Italy	908,010	880,399	1,577
LACTOGAL - PRODUTOS ALIMENTARES, S.A.	1051 Portugal	868,738	981,620	n.d.
DANONE, SA	1051 Spain	806,359	n.d.	1,239
CORPORACION ALIMENTARIA PENASANTA, SA	1051 Spain	727,761	743,274	1,109
YOPLAIT FRANCE	1051 France	700,643	732,633	1,066
BLEDINA	1051 France	693,788	709,068	1,411
COMPAGNIE DES FROMAGES ET RICHESMONTS	1051 France	666,473	652,289	1,312
EURIAL ULTRA FRAIS	1051 France	663,453	648,952	n.d.
INDUSTRIAS LACTEAS ASTURIANAS SA	1051 Spain	654,069	660,185	1,443
LACTALIS NESTLE ULTRA-FRAIS MARQUES	1051 France	619,293	613,153	1,102
FROMAGERIES BEL PRODUCTION FRANCE	1051 France	599,367	593,684	n.d.
EURIAL	1051 France	556,680	531,207	1,110
MONSTER ENERGY LIMITED	1011 Ireland	547,455	456,632	32
DUKAT MLIJECA INDUSTRIJA D.D	1042 Croatia	526,311	522,366	2,971
MEIEREI BARMSTEDT EG	1051 Germany	520,896	424,200	193
DALE FARM LIMITED	1051 Great Britain	503,218	520,618	854
POLMLEK SP. Z O.O.	1051 Poland	494,389	448,806	n.d.
EUROSERUM	1051 France	441,734	356,538	762
AMBROSI SPA	1051 Italy	437,998	337,502	366
LACTALIS COMPRAS Y SUMINISTROS SL	1051 Spain	430,916	420,635	49
NUOVA CASTELLI SPA	1051 Italy	428,809	486,521	156
ORNUA FOODS UK LIMITED	1051 Great Britain	413,138	356,647	676
LATTERIA SORESINA SCA	1051 Italy	404,384	368,257	645
COLLA SPA	1051 Italy	400,910	354,559	260
VINDIJA D.D. VARAZDIN	1051 Croatia	399,658	387,144	1,136
KAIKU CORPORACION ALIMENTARIA SL	1051 Spain	394,047	394,571	1,570
INGREDIA	1051 France	379,159	348,270	417
ITALATTE SRL	1051 Italy	371,145	974,211	12
LES MAITRES LAITIERS DU COTENTIN	1051 France	363,280	352,185	824
GLANBIA CHEESE LIMITED	1051 Great Britain	350,669	305,479	382
STERILGARDA ALIMENTI SPA	1051 Italy	348,865	345,044	317
QUESERIAS ENTREPINARES SAU	1051 Spain	334,149	305,830	723
EURIAL FOOD SERVICE & INDUSTRY	1051 France	332,343	333,080	172



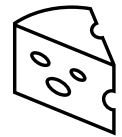
Principali imprese: DAIRY

Company name	Cod. NACE Country	Turnover		N. Employees
		2019	2018	
MONTS & TERROIRS	1051 France	325,364	313,577	365
CONSORZIO LATTERIE VIRGILIO SAC	1051 Italy	322,349	323,887	251
OKREGOWA SPOLDZIELNIA MLECZARSKA	1051 Poland	314,842	291,093	936
DANONE SP. Z O.O.	1051 Poland	312,914	298,532	1,249
OBERSTEIRISCHE MOLKEREI EGEN	1051 Austria	284,337	277,044	n.d.
OKREGOWA SPOLDZIELNIA MLECZARSKA	1051 Poland	279,439	298,176	1,003
YEO VALLEY FARMS (PRODUCTION) LIMITED	1051 Great Britain	286,256	286,019	1,522
ZOTT - POLSKA SP. Z O.O.	1051 Poland	275,997	262,283	532
LACTALIS FORLASA SL	1051 Spain	266,499	256,480	98
LES FROMAGERIES OCCITANES	1051 France	257,149	254,243	892
LACPATRICK DAIRIES (NI) LIMITED	1051 Great Britain	255,950	299,959	246
FLECHARD LAITERIE DU PONT MORIN	1051 France	254,989	259,266	141
LAITERIE SAINT PERE	1051 France	252,677	244,846	347
LATTE MONTAGNA ALTO ADIGE SAC	1051 Italy	251,694	246,984	534
LECHE CELTA SL	1051 Spain	248,341	319,917	341
GENNARO AURICCHIO SPA	1051 Italy	247,128	248,167	491
MLEKARNA PRAGOLAKTOS, A.S.	1051 Czech Rep.	245,713	234,268	n.d.
SOCIETE LAITIERE DE L'HERMITAGE	1051 France	243,825	225,728	n.d.
SOLE-MIZO TEJTERMEKET GYARTO	1051 Hungary	240,296	231,975	1,215
SOCIETE LAITIERE DE VITRE	1051 France	234,642	228,165	415
SALZBURGMILCH GMBH	1051 Austria	229,696	222,487	345
THE FIRST MILK CHEESE COMPANY LIMITED	1051 Great Britain	229,204	228,167	177
COOPERLAT SCA	1051 Italy	226,514	220,237	303
DANONE SPA	1051 Italy	224,890	209,830	177
MADETA A. S.	1051 Czech Rep.	221,254	216,672	n.d.
SOCIETE FROMAGERE DE BOUVRON	1051 France	220,881	209,116	483
SAVENCIA FROMAGE & DAIRY INTERNATIONAL.	1051 France	220,877	n.d.	3
NESTLE S.A	1051 Switzerland	220,877	n.d.	3
MOLKEREIGENOSSENSCHAFT RADEBERG RAIFFEISEN	1051 Germany	216,760	162,296	351
BRAZZALE SPA	1051 Italy	216,753	186,954	300
RUPP AG	1051 Austria	212,324	202,950	n.d.
SOCIETE LAITIERE DE RETIERS	1051 France	207,413	183,797	372
SOCIETE FROMAGERE DE CHARCHIGNE	1051 France	204,168	192,189	375
HERBIGNAC CHEESE INGREDIENTS	1051 France	204,148	207,966	270
LAITERIES H TRIBALLAT	1051 France	202,873	204,442	n.d.
GMUNDNER MOLKEREI EGEN	1051 Austria	198,462	194,377	351
LACTINOV ABBEVILLE	1051 France	186,549	186,877	n.d.
SCHWAELEBCHEN MOLKEREI JAKOB BERZ AG	1051 Germany	184,771	186,545	418
ASSEGNATARI ASSOCIATI ARBOREA - SCA	1051 Italy	184,733	184,387	462
IGOR SRL	1051 Italy	183,053	159,131	240
OKREGOWA SPOLDZIELNIA MLECZARSKA W KOLE	1051 Poland	181,637	158,380	638
AD IMLEK	1051 Serbia	180,259	203,281	935
CENTRALE DEL LATTE D Italy SPA	1051 Italy	178,586	183,271	402
LJUBLJANSKE MLEKARNE	1051 Slovenia	177,652	169,209	607
POLMLEK RACIAZ SP. Z O.O.	1051 Poland	176,261	113,378	313
IN.AL.PI. SPA	1051 Italy	174,984	174,796	198
NIJJAR PROPERTY LIMITED	1051 Great Britain	166,561	169,739	274
OSTSEE-MOLKEREI WISMAR GMBH	1051 Germany	166,249	157,270	129
PADANIA ALIMENTI SRL	1051 Italy	164,759	165,379	85
ESNELAT SL	1051 Spain	163,806	169,782	217



Principali imprese: DAIRY

Company name	Cod.	Country	Turnover		N. Employees
	NACE		2019	2018	
ALFOLDI TEJ ERTEKESITO ES BESZERZO	1051	Hungary	161,364	171,639	708
LATTERIA SOCIALE MANTOVA SAC	1051	Italy	160,812	146,344	137
OKREGOWA SPOLDZIELNIA MLECZARSKA	1051	Poland	160,797	151,441	584
FROMAGERIES BEL PORTUGAL, S.A.	1051	Portugal	156,017	152,685	597
SABELLI SPA	1051	Italy	155,757	148,116	347
SOCIETE LAITIERE DE CLERMONT	1051	France	154,790	146,883	194
HOCHLAND POLSKA SP. Z O.O.	1051	Poland	154,544	152,215	795
STE LAITIERE DE MAYENNE	1051	France	152,204	173,512	124
ARABIAN FOOD INDUSTRIES CO. DOMTY (S.A.E)	1051	Egypt	149,819	127,438	3,633
SOCIETE BEURRIERE DE RETIERS	1051	France	148,405	142,504	140
ALIVAL SPA	1051	Italy	146,108	165,515	286
OBOUR LAND FOR FOOD INDUSTRIES S.A.E	1051	Egypt	144,200	11,633	n.d.
UCKERMAERKER MILCH GMBH	1051	Germany	143,564	131,605	3
OLMA, A.S.	1051	Czech Rep.	142,957	132,469	n.d.
GRUPO LECHE RIO SA.	1051	Spain	142,254	133,627	125
BIRAGHI - SPA	1051	Italy	142,191	131,716	172
ALBALACT SA	1051	Romania	141,244	n.d.	487
CANELIA PETIT FAYT BEURRE	1051	France	138,593	148,882	109
BAYERNLAND - SRL	1051	Italy	138,356	135,983	55
L.E. PRITCHITT & COMPANY LIMITED	1051	Great Britain	138,283	126,724	238
SPOLDZIELCZA MLECZARNIA SPOMLEK	1051	Poland	137,897	127,422	773
REGILAIT	1051	France	136,463	132,785	195
BAKOMA SP. Z O.O.	1051	Poland	136,154	129,954	990
BONILAIT PROTEINES	1051	France	135,089	135,873	223
LAITERIE DE MONTAIGU - SAS SABOURIN	1051	France	133,060	123,910	222
GEBRUEDER WOERLE GESELLSCHAFT M.B.H.	1051	Austria	132,725	123,534	340
DANONE SRL	1051	Romania	132,507	121,847	379
SOCIETE FROMAGERE DE LONS LE SAUNIER	1051	France	130,625	133,595	354
MARCILLAT CORCIEUX	1051	France	130,219	123,743	414
GRAHAMS THE FAMILY DAIRY GROUP LIMITED	1051	Great Britain	129,345	127,473	766
SOCIETE LAITIERE MONTAUBAN	1051	France	128,888	125,843	165
DALE FARM (GB) LIMITED	1051	Great Britain	128,484	122,612	196
OKREGOWA SPOLDZIELNIA MLECZARSKA	1051	Poland	128,246	120,380	381
ANDROS UK LIMITED	1051	Great Britain	128,096	106,220	214
LECHE DE GALICIA SLU	1051	Spain	128,084	126,740	155
MOLKEREI NIESKY GMBH	1051	Germany	126,856	n.d.	112
MARTIN-BROWER IRELAND LIMITED	1011	Ireland	125,825	119,568	105
POLMLEK GRUDZIADZ SP. Z O.O.	1051	Poland	123,951	156,706	n.d.
PROLACTAL GMBH	1051	Austria	123,600	171,949	200
DAIRYGOLD FOOD INGREDIENTS (UK) LIMITED	1051	Great Britain	122,598	126,854	155
LUMIKO SP. Z O.O.	1051	Poland	122,420	139,899	332
CORMAN MILOKO IRELAND LIMITED	1051	Ireland	121,076	141,983	44
TM TELFORD DAIRY LIMITED	1051	Great Britain	121,011	98,789	216
NORDSEEMILCH EG	1051	Germany	121,001	127,663	97
TOLNATEJ TOLNA MEGYEI TEJIPARI ZARTKORUEN	1051	Hungary	120,681	99,471	501
LNUF BAYEUX	1051	France	120,644	117,229	245
ORNUA INGREDIENTS UK LIMITED	1051	Great Britain	120,464	118,270	238
SOCIETE FROMAGERE DE DOMFRONT	1051	France	120,311	119,912	363
SAVENCIA FROMAGE & DAIRY CZECH REPUBLIC, A.S.	1051	Czech Rep.	120,130	118,998	n.d.
THE CALEDONIAN CHEESE COMPANY LIMITED	1051	Great Britain	118,505	103,552	115



Principali imprese: DAIRY

Company name	Cod. NACE	Country	Turnover		N. Employees
			2019	2018	
SOCIETE AFFINAGE-CONDITIONNEMENT	1051	France	118,193	110,288	337
SOCIETE LAITIERE DES VOLCANS D'AUVERGNE	1051	France	117,627	115,489	136
PPHU LAKTOPOL SP. Z O. O.	1051	Poland	115,603	115,553	n.d.
MLEKARNA HLINSKO, A.S.	1051	Czech Rep.	114,191	112,674	n.d.
LATTEBUSCHE S.C.A.	1051	Italy	114,000	107,467	323
QUESERIA LAFUENTE SAU	1051	Spain	113,709	117,779	242
NUTRI'BABIG	1051	France	113,683	n.d.	n.d.
CENTRALE DEL LATTE DI ROMA SPA	1051	Italy	113,179	117,260	167
PRODUTTORI LATTE ASSOCIATI CREMONA SCA	1051	Italy	113,087	97,172	163
PINZGAU MILCH PRODUKTIONS GMBH	1051	Austria	112,310	106,718	208
VALCOLATTE SRL	1051	Italy	111,582	103,153	170
YEO FRAIS	1051	France	111,286	95,122	206
SYNUTRA FRANCE INTERNATIONAL	1051	France	111,137	203,486	341
INDUSTRIA CASEARIA SILVIO BELLADELLI SPA	1051	Italy	108,956	87,076	66
SOC FROMAGERE DE RIBLAIRE	1051	France	108,742	110,182	277
DALTER ALIMENTARI SPA	1051	Italy	108,245	101,865	131
OKREGOWA SPOLDZIELNIA MLECZARSKA	1051	Poland	108,039	101,075	337
ENNSTAL MILCH KG.	1051	Austria	107,171	102,760	215
FABRICA DE LAPTE BRASOV S.A.	1051	Romania	105,974	102,434	404
DOMSPITZMILCH EINGETRAGENE GENOSSENSCHAFT	1051	Germany	105,344	108,510	4
DAIRY PARTNERS LIMITED	1051	Great Britain	103,855	88,191	160
COOPERATIVA LATTERIA VIPITENO SA	1051	Italy	103,502	101,865	164
LACTEOS INDUSTRIALES AGRUPADOS SA	1051	Spain	103,193	93,651	265
FROMAGERIES ARNAUD FRERES	1051	France	102,918	92,973	46
FROMAGERIES HENRI HUTIN	1051	France	102,212	97,855	311
SPOLDZIELNIA MLECZARSKA W GOSTYNIU	1051	Poland	102,177	98,683	452
FRIESLANDCAMPINA HUNGARIA	1051	Hungary	101,526	97,142	486
PAYNES DAIRIES LIMITED	1051	Great Britain	101,022	94,745	138
LATTERIA MONTELLO SPA	1051	Italy	99,596	93,960	261
QUESOS EL PASTOR-HIJOS DE SALVADOR SA	1051	Spain	98,810	91,495	293
SOCIETE FROMAGERE DE PONTIVY	1051	France	98,298	64,726	97
YEW TREE DAIRY LIMITED	1051	Great Britain	98,155	100,499	16
ARIETE - FATTORIA LATTE SANO SPA	1051	Italy	97,517	98,916	25
FROMAGERIES CHABERT	1051	France	97,500	92,587	47
KOROSTEJ TEJFELDOLGOZO ES KERESKEDELMI KFT.	1051	Hungary	96,702	90,450	838
FRIESLANDCAMPINA ROMANIA S.A.	1051	Romania	94,730	89,270	539
LNUF LAVAL	1051	France	93,514	104,357	208
SOCIETE FROMAGERE DU MASSEGROS	1051	France	93,334	86,802	245
HOCHLAND ROMANIA SRL	1051	Romania	91,625	86,833	403
CENTRAL QUESERA MONTESINOS SL	1051	Spain	91,574	87,710	198
BEL POLSKA SP. Z O.O.	1051	Poland	91,367	98,742	373
STRATHROY DAIRY LIMITED	1051	Great Britain	91,164	86,858	151
SOCIETE LAITIERE DE PONTIVY	1051	France	90,252	64,726	n.d.
FROMAGERIE GUILLOTEAU	1051	France	88,935	90,986	330
OKREGOWA SPOLDZIELNIA MLECZARSKA W KRASNYMSTAWIE	1051	Poland	88,159	85,162	n.d.
POLINDUS SP. Z O.O.	1051	Poland	87,430	89,047	127
CELIA-LAITERIE DE CRAON	1051	France	87,425	53,204	235
CONSORZIO PRODUTTORI LATTE MILANO SCA	1051	Italy	87,309	69,632	5
CREDITON DAIRY LIMITED	1051	Great Britain	87,000	77,262	145
ANDIA LACTEOS DE CANTABRIA SL	1051	Spain	86,204	91,024	150

6

SCHEDE PAESE

ALBANIA



Consumers

2,837,743

CAGR 15/20

-0.3%



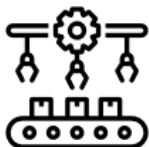
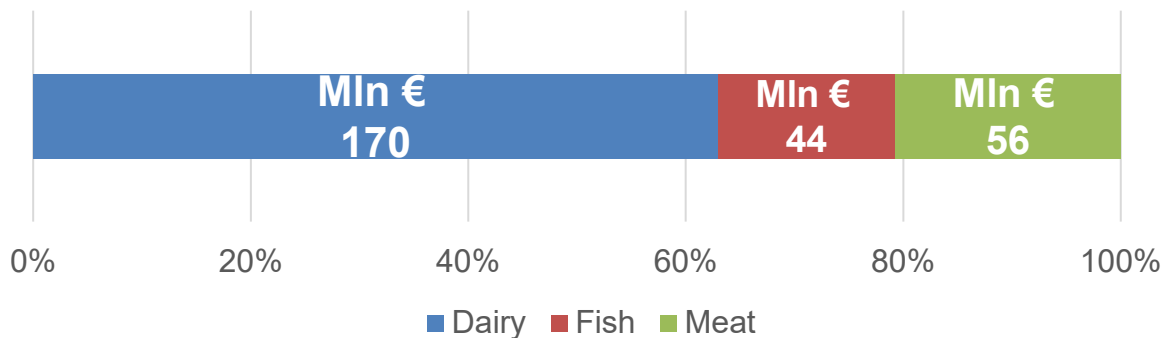
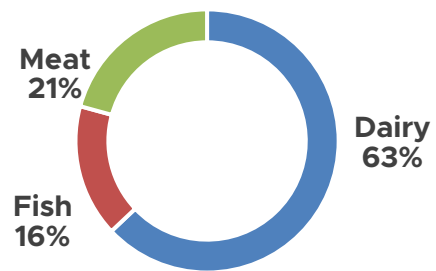
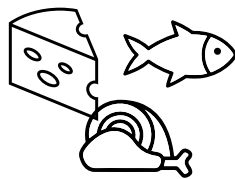
Gdp per capita

4.433 €

CAGR 15/20

+5.7%

Fresh food processing



Food processing & packaging machinery market

3,7 mln €

Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA

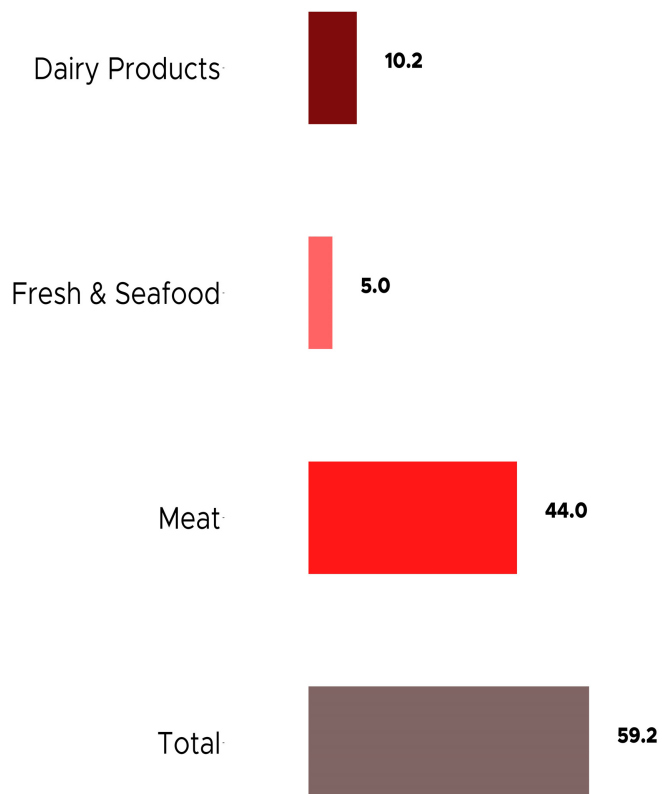


ALBANIA

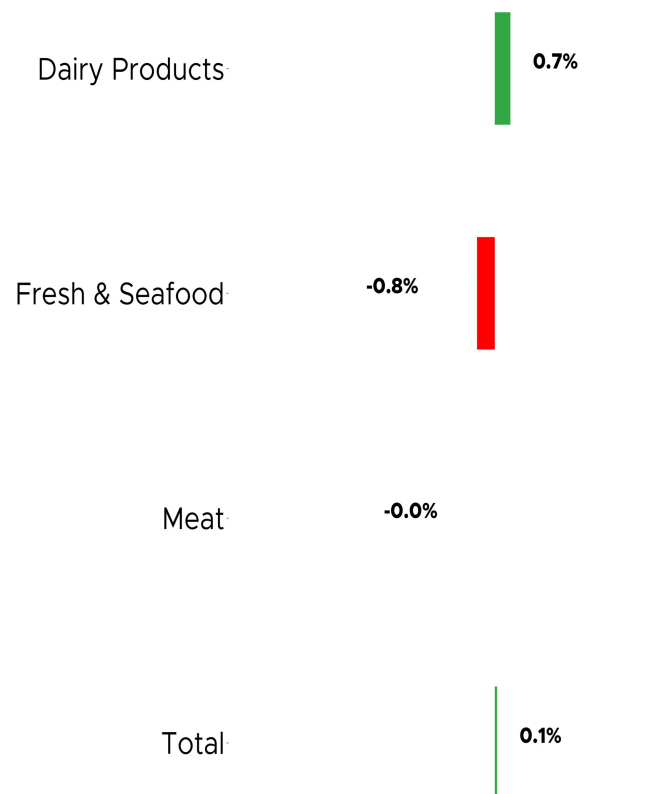
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	9.4	9.2	10.2	10.4	-0.7%	0.7%
Fresh & Seafood	4.9	4.5	5.0	4.9	-2.3%	-0.8%
Meat	40.0	39.3	44.0	44.0	-0.7%	-0.0%
Total	54.3	53.0	59.2	59.3	-0.8%	0.1%

Volume 2020



Volume CAGR 23/20 (%)





ALBANIA

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	1.1	1.0	1.1	1.1	-3.4%	-0.3%
Cheese	8.3	8.2	9.1	9.3	-0.3%	0.9%
Fresh Fish	1.7	1.7	1.9	1.9	-1.6%	0.2%
Fresh Seafood	0.1	0.1	0.1	0.1	-3.1%	0.0%
Processed Fish & Seafood	3.0	2.8	3.1	2.9	-2.7%	-1.4%
Fresh Meat	16.5	17.8	20.4	22.0	2.4%	2.5%
Processed Meat	23.5	21.5	23.6	22.0	-3.0%	-2.3%





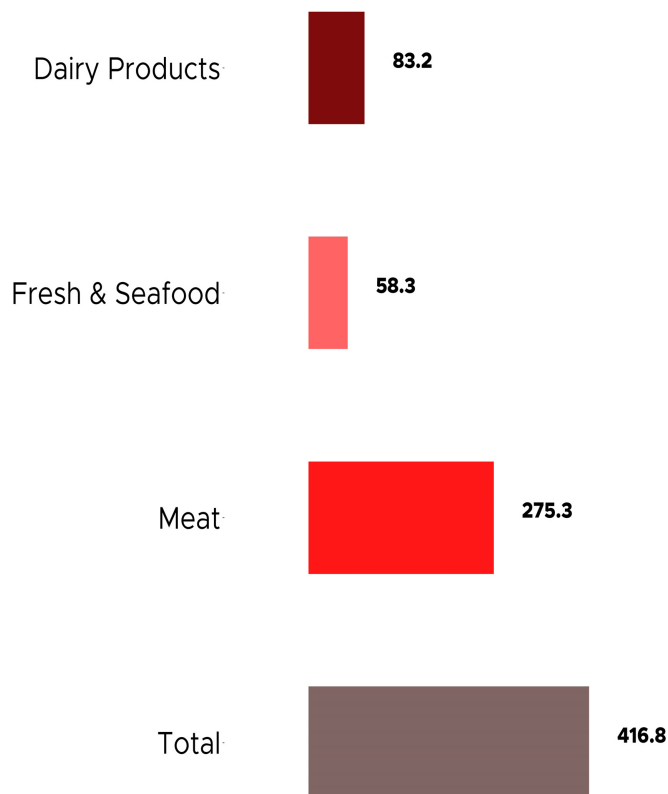
ALBANIA



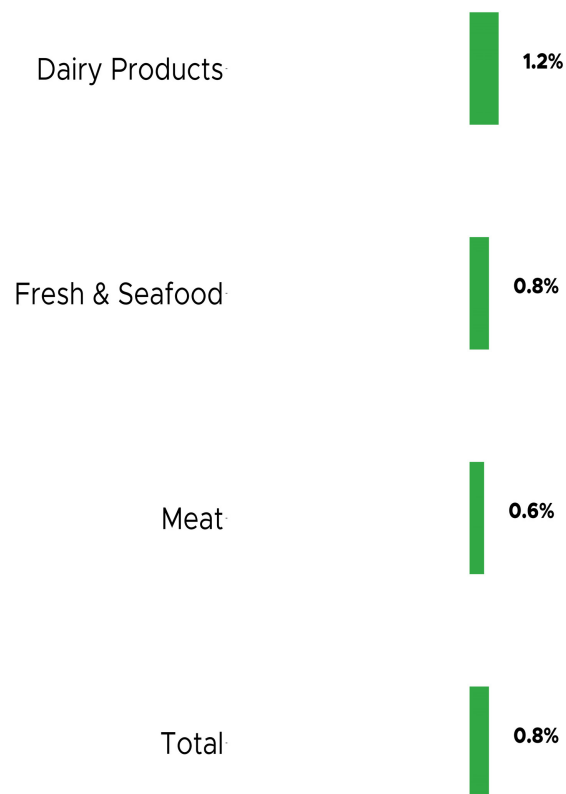
Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	74.3	75.1	83.2	86.2	0.3%	1.2%
Fresh & Seafood	50.8	51.6	58.3	59.7	0.5%	0.8%
Meat	241.5	244.0	275.3	280.4	0.3%	0.6%
Total	366.6	370.7	416.8	426.3	0.4%	0.8%

Revenues 2020



Volume CAGR 23/20 (%)



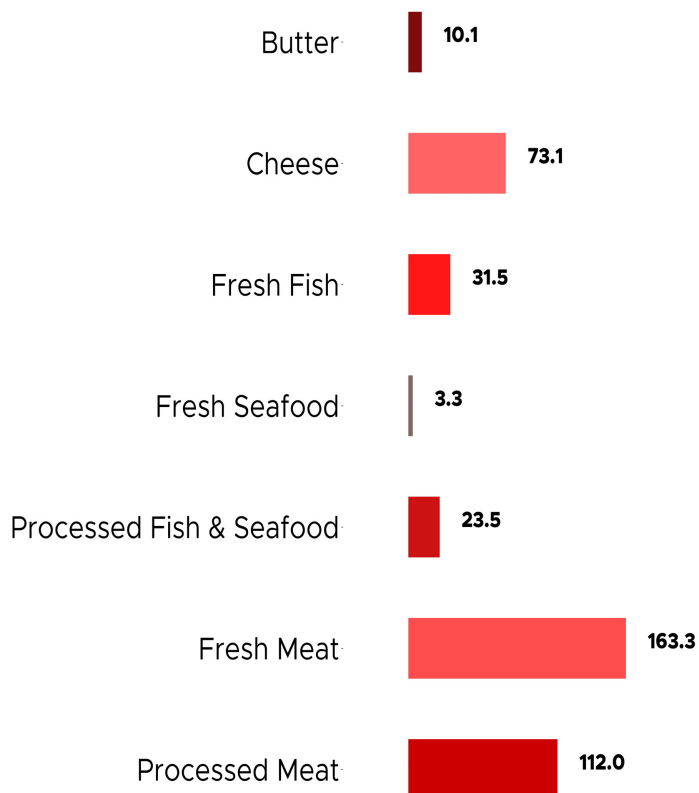


ALBANIA

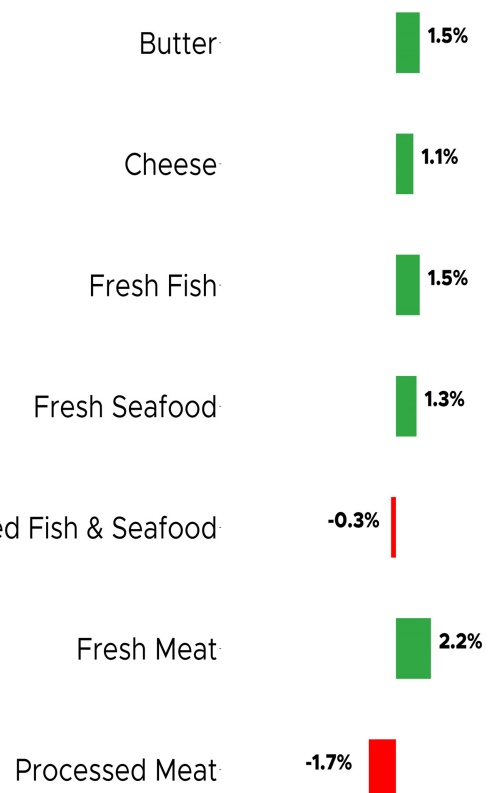
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	8.9	9.1	10.1	10.6	0.6%	1.5%
Cheese	65.4	66.0	73.1	75.6	0.3%	1.1%
Fresh Fish	26.6	27.6	31.5	33.0	1.3%	1.5%
Fresh Seafood	2.8	2.9	3.3	3.4	1.1%	1.3%
Processed Fish & Seafood	21.4	21.0	23.5	23.3	-0.5%	-0.3%
Fresh Meat	134.4	142.5	163.3	174.1	2.0%	2.2%
Processed Meat	107.1	101.5	112.0	106.3	-1.8%	-1.7%

Revenues 2020



Revenue CAGR 23/20 (%)



AUSTRIA



Consumers

8,917,205

CAGR 15/20

+0.6%



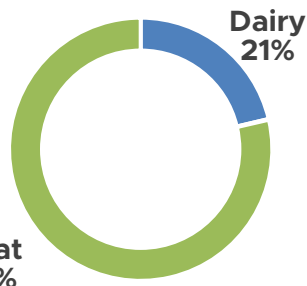
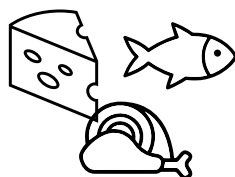
Gdp per capita

40.890 €

CAGR 15/20

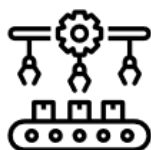
+1.7%

Fresh food processing



Most growing category 16/20

Dairy + 28.19% per year



Food processing & packaging machinery market

189,0 mln €

Packaging type

Most consumed

Flexible
Packaging 50.7%



Most growing 20/23

Rigid Plastic
+2.79 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



AUSTRIA

Meat Processing



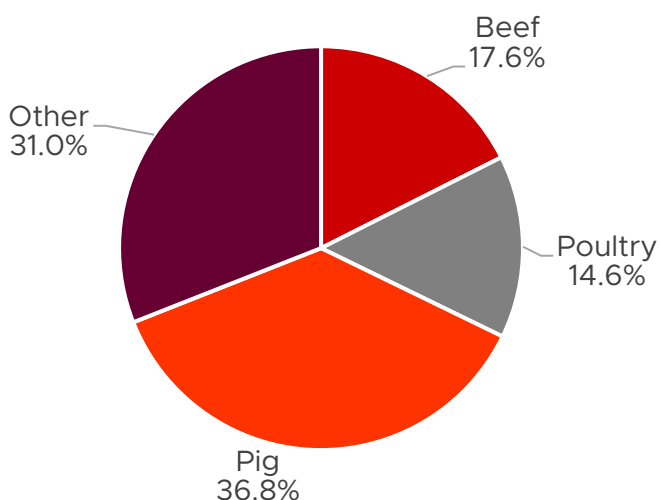
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	636.7	645.0	630.4	603.8	634.9	55%	-0.07%
Processed+Sausage	271.8	273.1	288.3	293.5	289.9	25%	1.62%
Frozen	28.8	51.5	48.6	51.7	54.8	5%	17.44%
Others	162.7	196.2	197.4	182.4	179.0	15%	2.42%
Total	1,100.0	1,165.9	1,164.7	1,131.4	1,158.6	100%	1.31%

Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	1,763.6	1,886.1	1,894.2	1,999.1	2,034.0	50%	3.63%
Processed+Sausage	1,400.1	1,479.6	1,601.5	1,671.7	1,758.2	43%	5.86%
Frozen	71.4	121.6	115.8	126.1	136.1	3%	17.50%
Others	97.5	135.3	128.3	131.7	143.8	4%	10.21%
Total	3,332.5	3,622.6	3,739.9	3,928.5	4,072.1	100%	5.14%

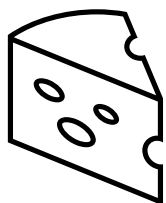
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



AUSTRIA

Dairy Processing

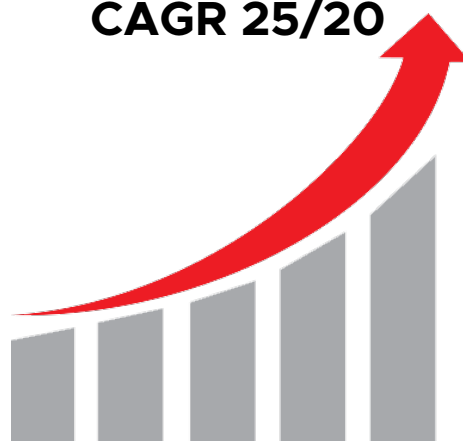
Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	214.6	194.4	201.7	213.3	240.5	86%	2.9%
Butter	37.5	37.3	38.3	38.4	37.8	14%	0.2%
Total	252.2	231.7	239.9	251.7	278.4	100%	2.5%

Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	726.7	717.8	763.0	832.0	933.0	85%	6.4%
Butter	143.9	175.0	182.9	175.1	170.6	15%	4.3%
Total	870.6	892.7	945.9	1,007.0	1,103.7	100%	6.1%

**Dairy Value
CAGR 25/20**



+2.5%

Source: elaboration on data Eurostat



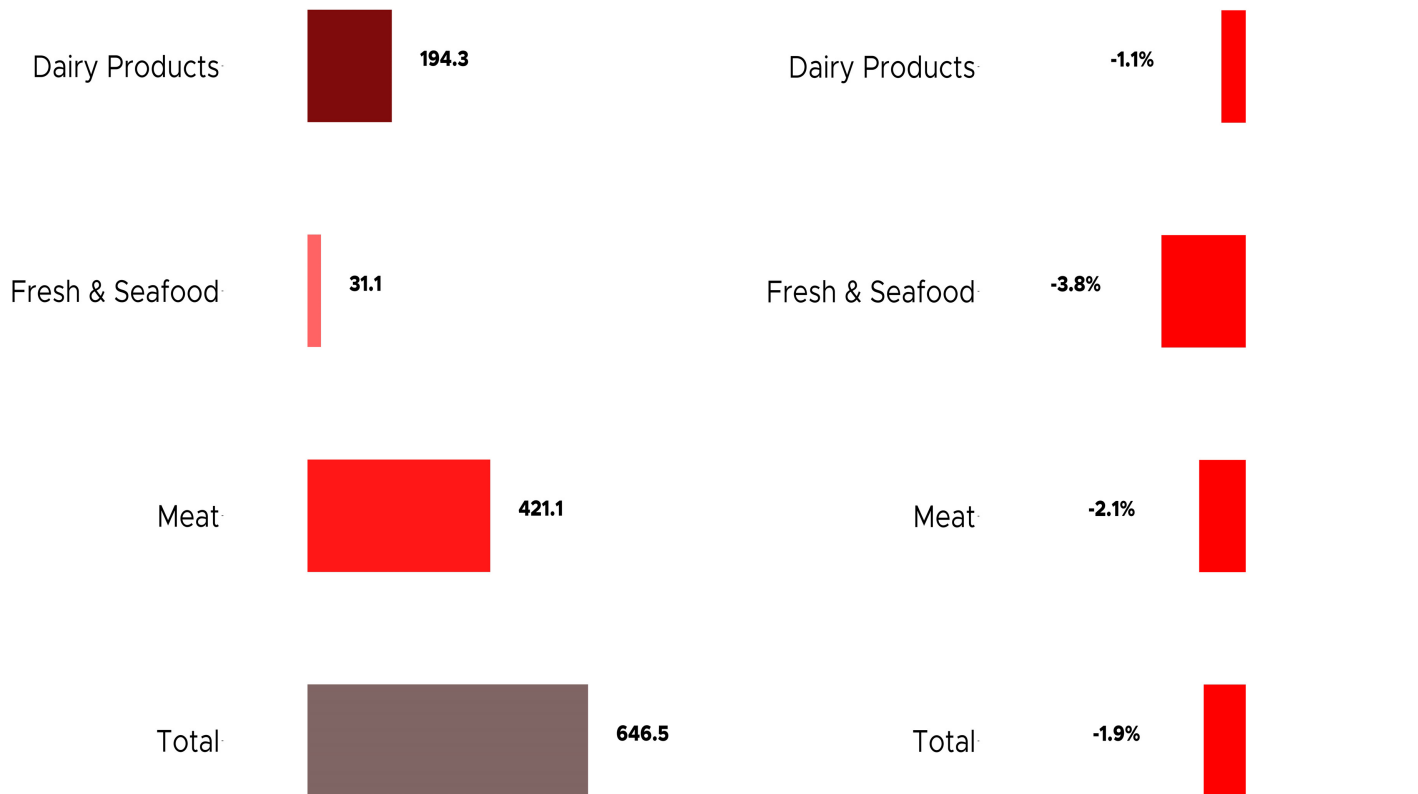
AUSTRIA

Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	168.9	178.2	194.3	187.9	1.8%	-1.1%
Fresh & Seafood	31.5	28.6	31.1	27.7	-3.2%	-3.8%
Meat	377.4	381.8	421.1	395.6	0.4%	-2.1%
Total	577.9	588.7	646.5	611.2	0.6%	-1.9%

Volume 2020

Volume CAGR 23/20 (%)

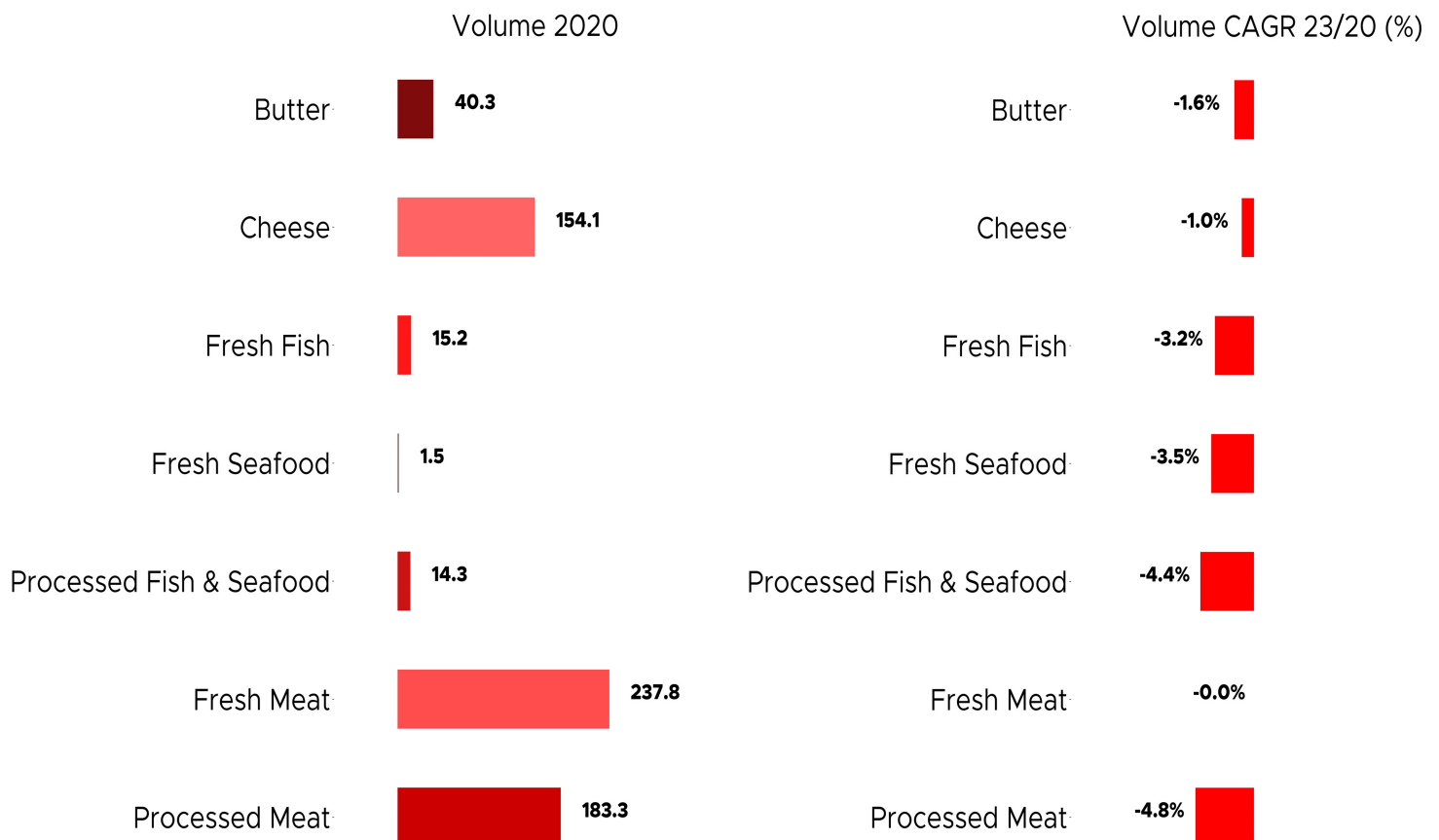




AUSTRIA

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	37.2	37.0	40.3	38.4	-0.1%	-1.6%
Cheese	131.8	141.2	154.1	149.5	2.3%	-1.0%
Fresh Fish	15.3	13.9	15.2	13.8	-3.1%	-3.2%
Fresh Seafood	1.5	1.4	1.5	1.3	-3.4%	-3.5%
Processed Fish & Seafood	14.7	13.3	14.3	12.5	-3.2%	-4.4%
Fresh Meat	194.0	210.9	237.8	237.5	2.8%	-0.0%
Processed Meat	183.4	170.9	183.3	158.2	-2.3%	-4.8%





AUSTRIA



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	1,113.2	1,162.8	1,267.7	1,223.9	1.5%	-1.2%
Fresh & Seafood	541.7	562.6	621.9	587.6	1.3%	-1.9%
Meat	3,827.4	4,002.7	4,434.7	4,219.4	1.5%	-1.6%
Total	5,482.3	5,728.1	6,324.2	6,030.9	1.5%	-1.6%

Revenues 2020

Volume CAGR 23/20 (%)





AUSTRIA

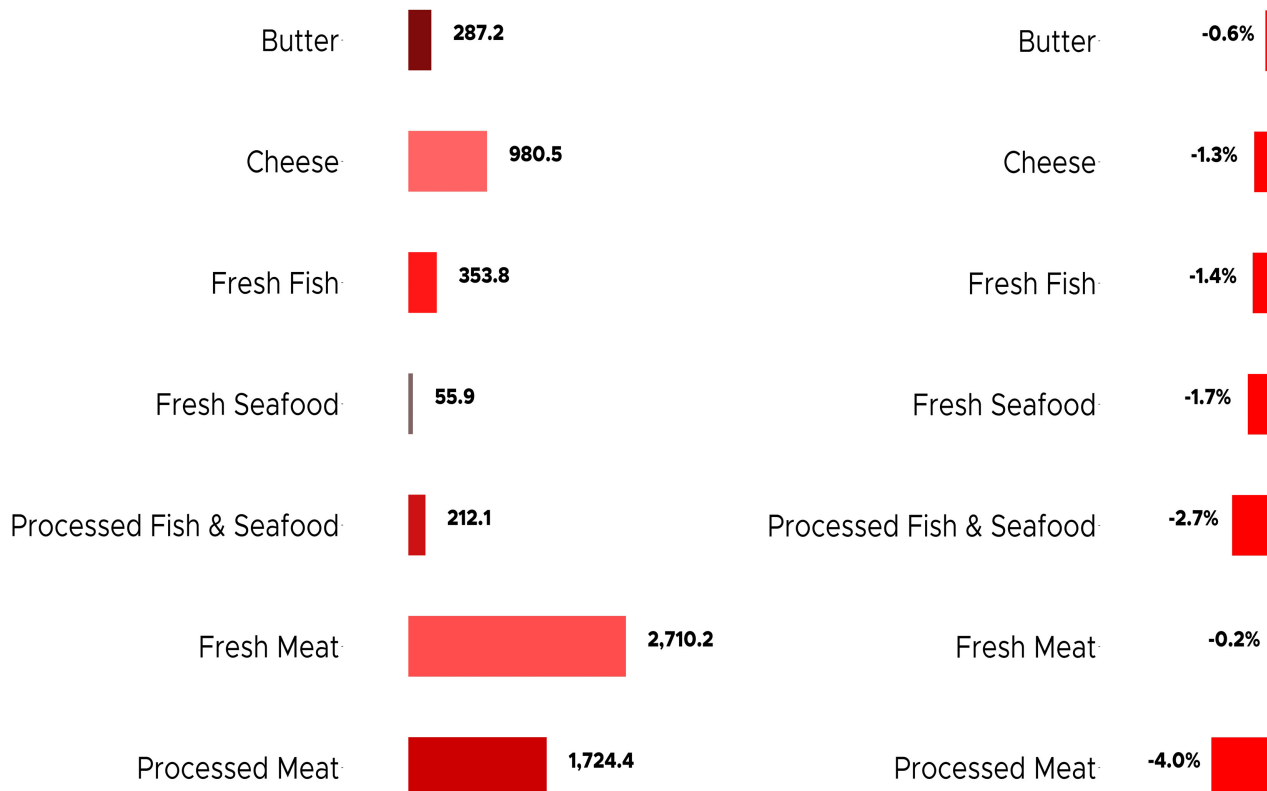


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	246.5	261.9	287.2	282.0	2.0%	-0.6%
Cheese	866.7	900.9	980.5	941.9	1.3%	-1.3%
Fresh Fish	302.8	318.7	353.8	338.9	1.7%	-1.4%
Fresh Seafood	48.3	50.5	55.9	53.2	1.5%	-1.7%
Processed Fish & Seafood	190.7	193.4	212.1	195.5	0.5%	-2.7%
Fresh Meat	2,197.4	2,409.2	2,710.2	2,695.8	3.1%	-0.2%
Processed Meat	1,630.0	1,593.5	1,724.4	1,523.6	-0.8%	-4.0%

Revenues 2020

Revenue CAGR 23/20 (%)



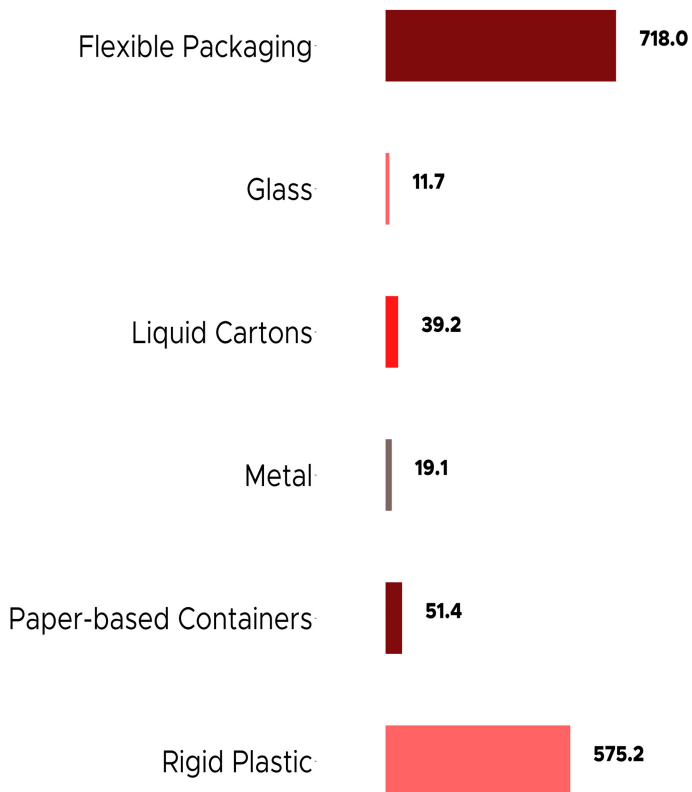


AUSTRIA

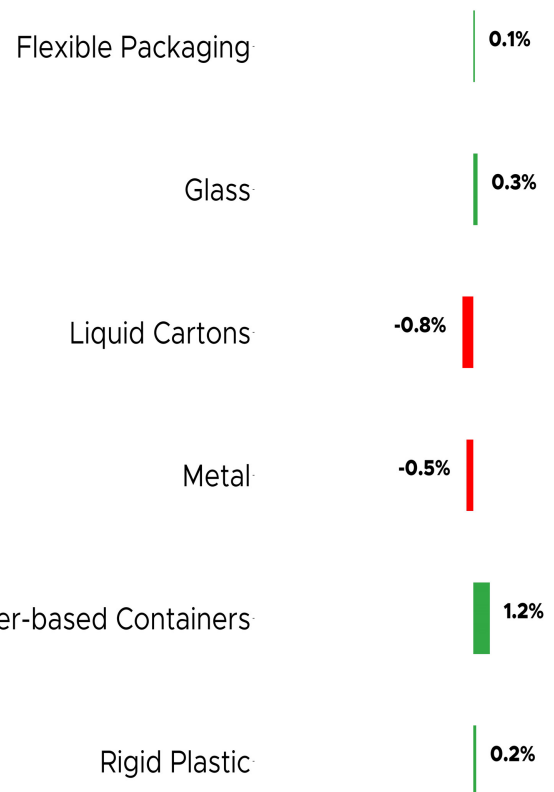
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	655.6	684.9	718.0	719.4	1.5%	0.1%
Glass	11.1	11.3	11.7	11.9	0.6%	0.3%
Liquid Cartons	39.7	38.3	39.2	38.2	-1.2%	-0.8%
Metal	19.1	18.6	19.1	18.9	-0.8%	-0.5%
Paper-based Containers	46.2	48.9	51.4	53.3	1.9%	1.2%
Rigid Plastic	539.7	553.3	575.2	578.0	0.8%	0.2%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



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Consumers

3,280,815

CAGR 15/20

-0,9%



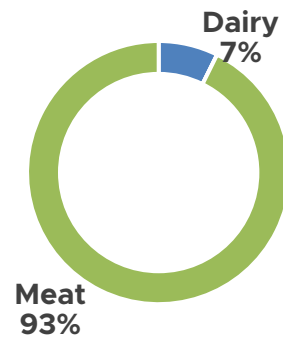
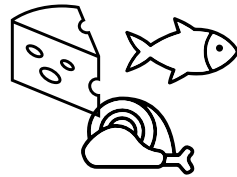
Gdp per capita

5.127 €

CAGR 15/20

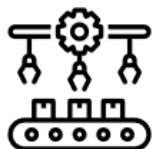
+5,0%

Fresh food processing



Most growing category 16/20

Dairy +5.63% per year



Food processing & packaging machinery market

8,0 mln €

Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



BOSNIA

Meat Processing

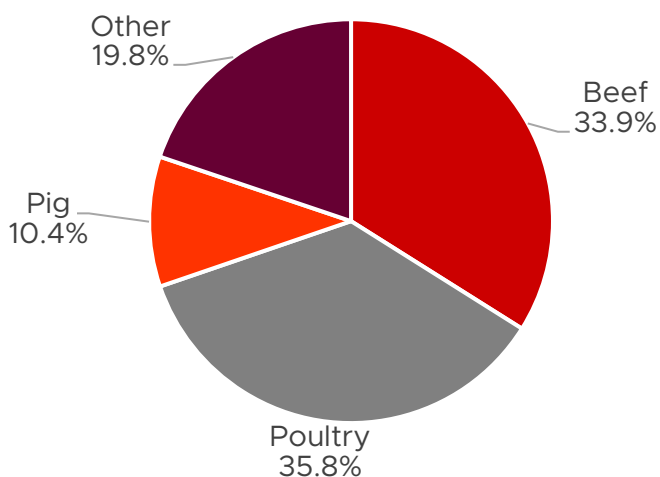
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	52.0	59.7	61.3	65.2	63.4	59%	5.09%
Processed+Sausage	41.3	36.7	35.2	38.3	41.8	39%	0.29%
Frozen	0.0	0.0	0.0	0.0	0.0	0%	n.a.
Others	5.3	6.4	1.4	1.7	1.7	2%	-25.12%
Total	98.6	102.8	97.9	105.1	106.9	100%	2.04%

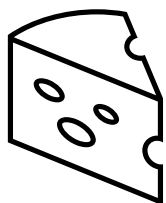
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	159.4	173.7	182.2	177.5	186.5	56%	4.00%
Processed+Sausage	129.6	123.9	118.2	131.0	142.2	43%	2.34%
Frozen	0.0	0.0	0.0	0.0	0.0	0%	n.a.
Others	12.4	15.9	2.0	2.2	2.3	1%	-34.45%
Total	301.5	313.6	302.5	310.6	331.1	100%	2.37%

Shares 2020 by meat type



Source: elaboration on data Eurostat



BOSNIA

Dairy Processing



Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	6.6	6.9	7.3	7.6	7.4	85%	3.0%
Butter	1.4	1.1	1.1	1.3	1.3	15%	-2.1%
Total	8.0	7.9	8.4	8.9	8.7	100%	2.1%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	16.2	18.1	18.4	21.8	20.8	79%	6.5%
Butter	4.8	4.2	5.0	5.7	5.4	21%	2.7%
Total	21.0	22.2	23.3	27.5	26.2	100%	5.6%

Source: elaboration on data Eurostat



BOSNIA

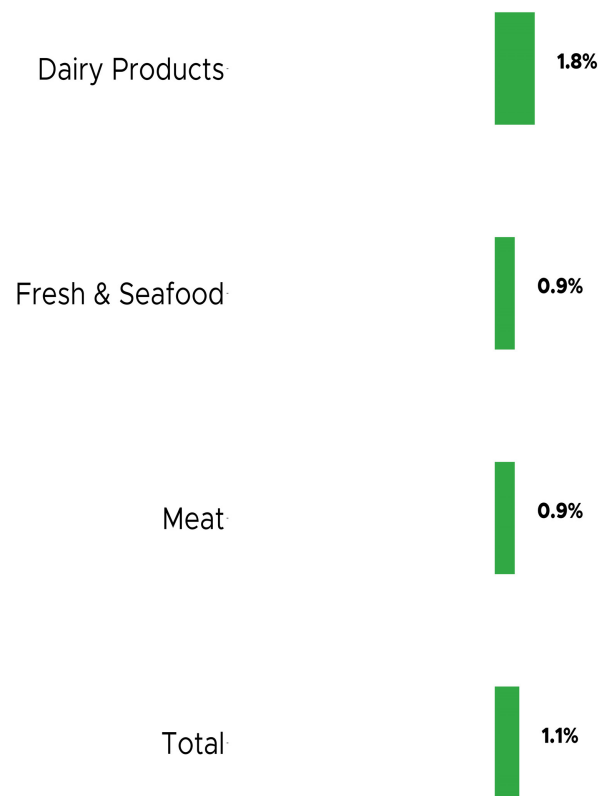
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	18.3	19.7	21.6	22.8	2.5%	1.8%
Fresh & Seafood	9.3	9.6	10.6	10.9	1.1%	0.9%
Meat	73.1	77.0	85.2	87.5	1.7%	0.9%
Total	100.7	106.3	117.5	121.3	1.8%	1.1%

Volume 2020



Volume CAGR 23/20 (%)

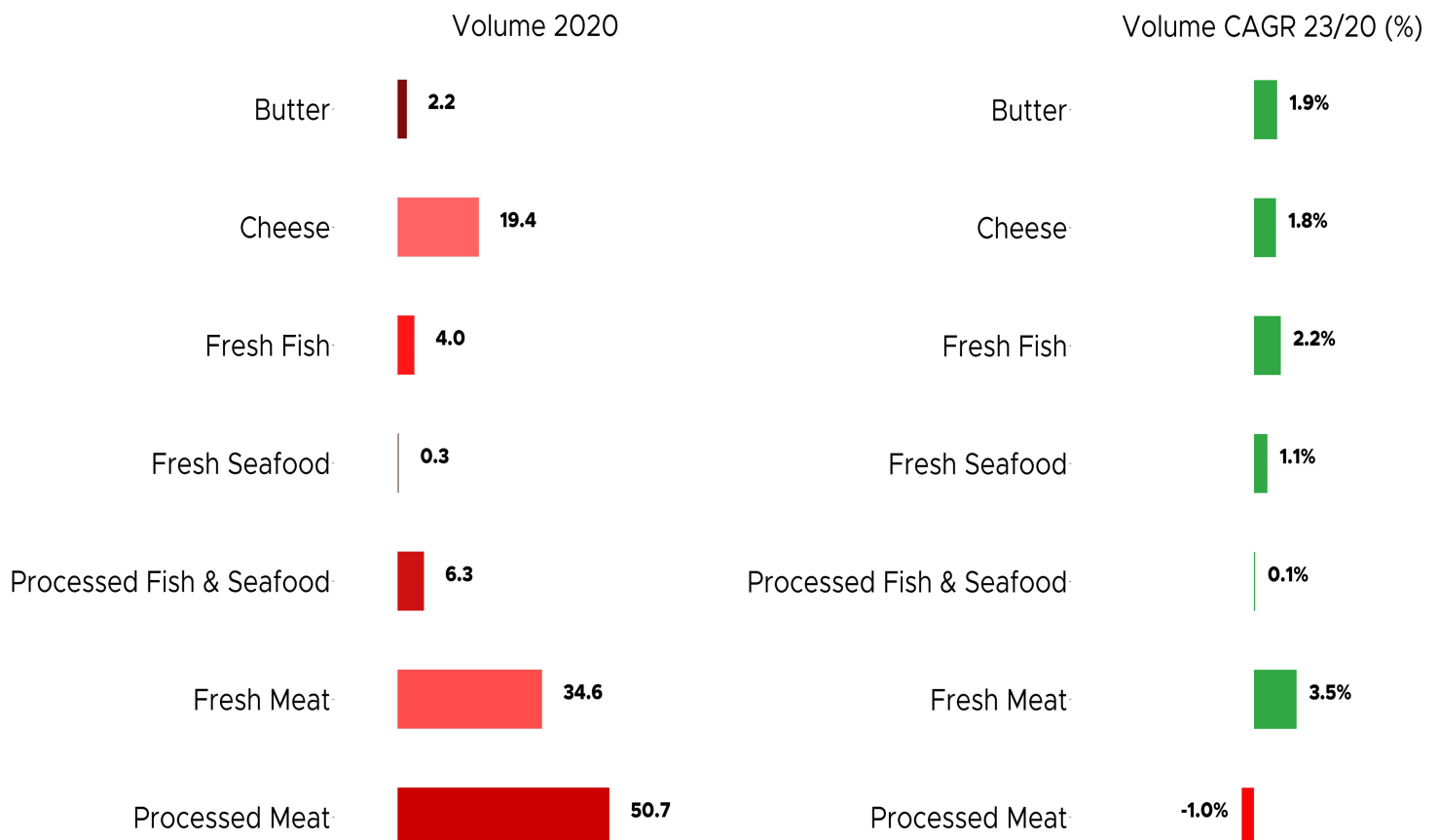




BOSNIA

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	1.9	2.0	2.2	2.3	2.1%	1.9%
Cheese	16.4	17.7	19.4	20.5	2.6%	1.8%
Fresh Fish	3.3	3.6	4.0	4.3	2.6%	2.2%
Fresh Seafood	0.2	0.3	0.3	0.3	1.3%	1.1%
Processed Fish & Seafood	5.7	5.7	6.3	6.3	0.2%	0.1%
Fresh Meat	26.5	30.5	34.6	38.3	4.7%	3.5%
Processed Meat	46.6	46.6	50.7	49.2	-0.0%	-1.0%





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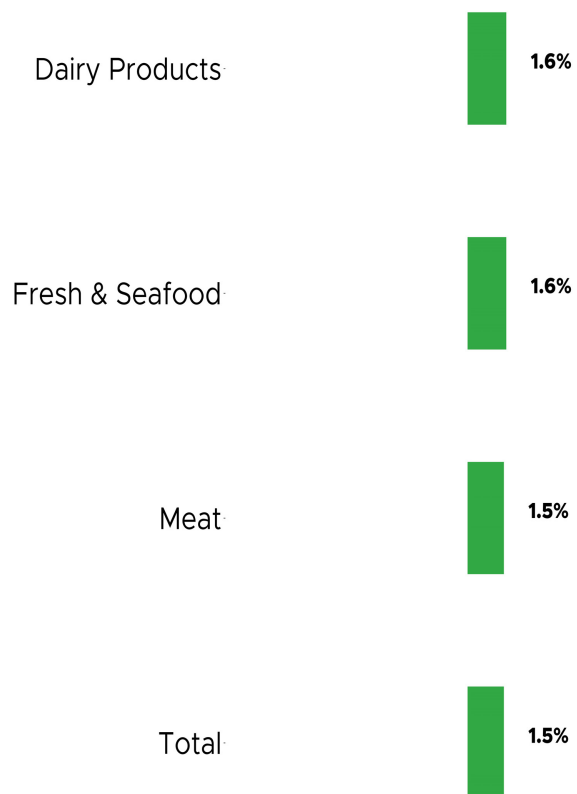
Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	143.9	154.2	168.8	177.2	2.3%	1.6%
Fresh & Seafood	98.7	106.7	119.0	125.0	2.6%	1.6%
Meat	467.9	503.1	560.0	584.7	2.4%	1.5%
Total	710.5	763.9	847.8	886.9	2.4%	1.5%

Revenues 2020



Volume CAGR 23/20 (%)





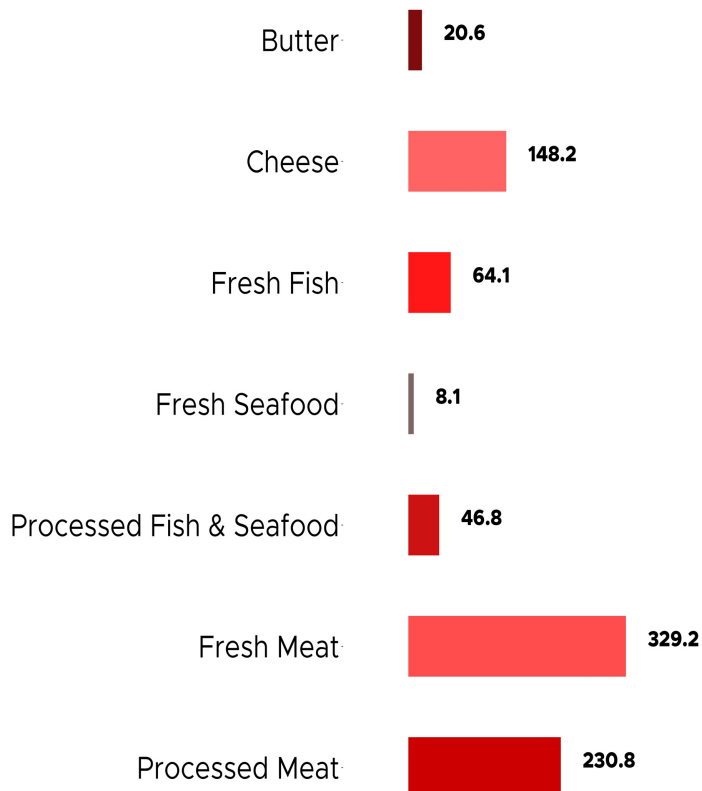
BOSNIA



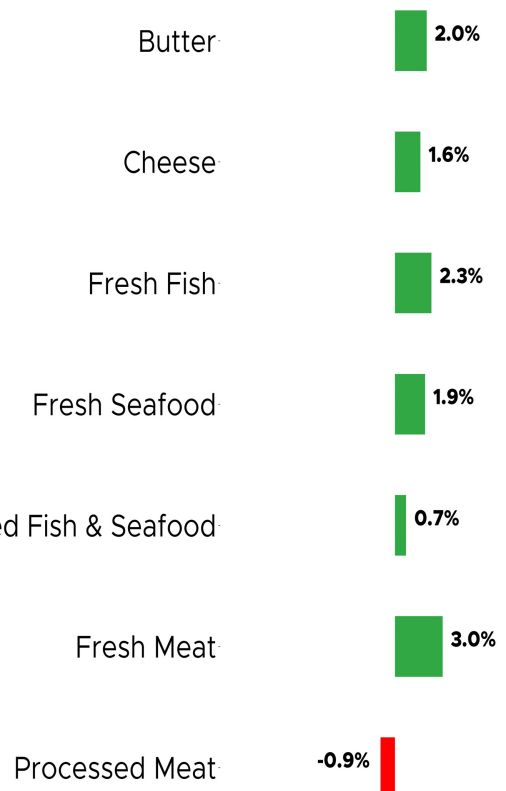
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	17.3	18.8	20.6	21.9	2.7%	2.0%
Cheese	126.6	135.4	148.2	155.3	2.3%	1.6%
Fresh Fish	51.8	57.1	64.1	68.6	3.3%	2.3%
Fresh Seafood	6.7	7.2	8.1	8.6	2.9%	1.9%
Processed Fish & Seafood	40.2	42.3	46.8	47.8	1.7%	0.7%
Fresh Meat	257.8	291.1	329.2	359.9	4.1%	3.0%
Processed Meat	210.1	211.9	230.8	224.8	0.3%	-0.9%

Revenues 2020



Revenue CAGR 23/20 (%)



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Consumers

6,927,288

CAGR 15/20

-0.7%



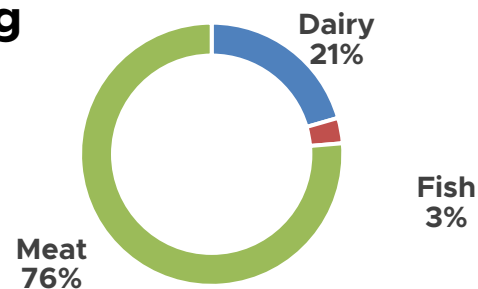
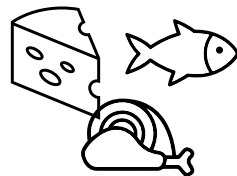
Gdp per capita

8.479 €

CAGR 15/20

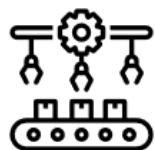
+7.2%

Fresh food processing



Most growing category 16/20

Dairy +11.93% per year



Food processing & packaging machinery market

43,7 mln €

Packaging type

Most consumed

Flexible

Packaging 69.1%



Most growing 20/23

Metal

+14.2 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



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Meat Processing

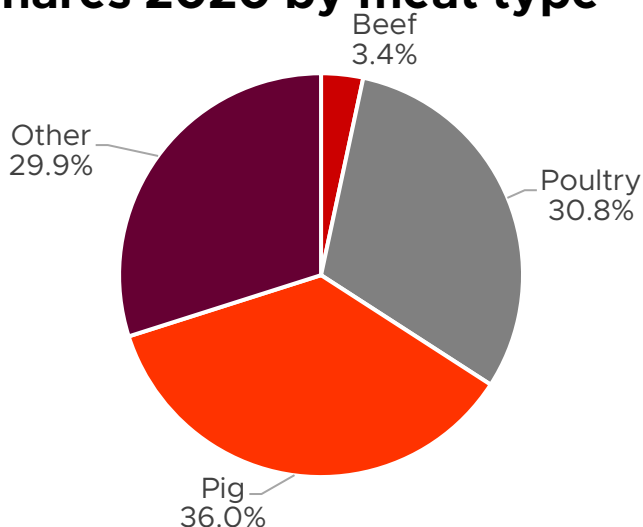
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	226.8	230.1	271.3	268.9	244.8	51%	1.93%
Processed+Sausage	128.4	131.4	136.0	137.7	134.2	28%	1.11%
Frozen	53.9	55.4	51.9	84.0	65.7	14%	5.08%
Others	24.6	33.5	30.2	37.8	35.2	7%	9.34%
Total	433.7	450.5	489.4	528.4	479.9	100%	2.56%

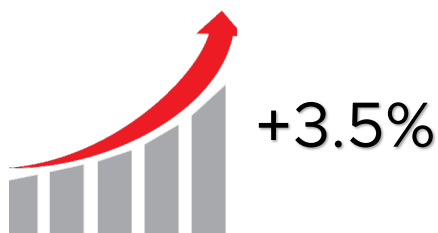
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	503.1	542.3	601.2	630.7	579.9	46%	3.61%
Processed+Sausage	344.2	378.8	412.5	430.2	460.7	37%	7.56%
Frozen	104.9	124.4	115.5	137.1	132.1	11%	5.92%
Others	46.7	102.9	100.0	85.7	77.6	6%	13.55%
Total	999.0	1,148.4	1,229.2	1,283.7	1,250.3	100%	5.77%

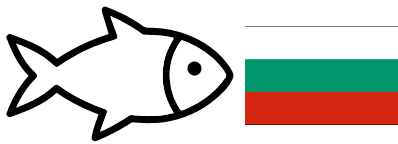
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



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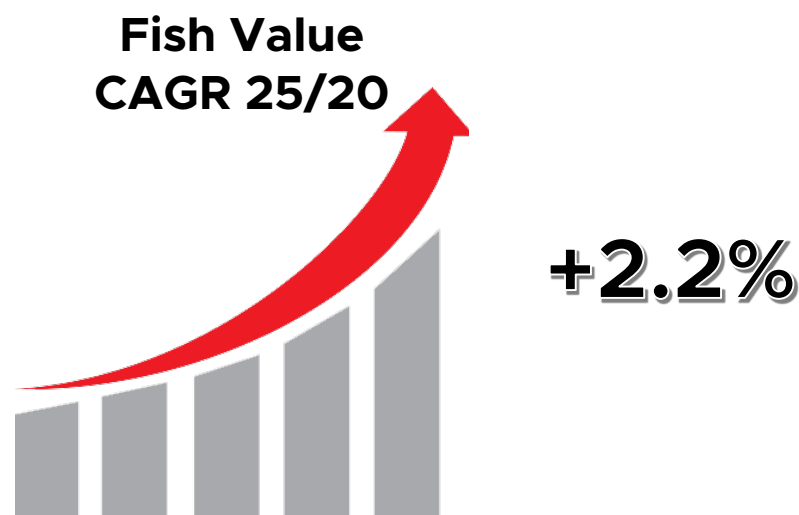
Fish Processing

Fish Volume by categories (mln Kg)

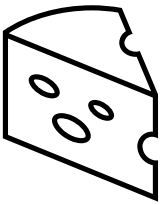
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	0.4	0.6	1.3	1.0	7%	n.a.
Frozen	2.4	2.9	4.2	4.7	4.6	33%	17.8%
Processed	9.7	10.3	8.5	8.9	8.4	60%	-3.7%
Total	12.1	13.6	13.3	14.9	13.9	100%	3.6%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	2.1	2.4	5.2	4.4	9%	n.a.
Frozen	4.9	5.6	8.2	9.1	9.8	19%	19.2%
Processed	41.3	47.8	39.9	41.3	36.9	72%	-2.8%
Total	46.2	55.5	50.6	55.6	51.2	100%	2.6%



Source: elaboration on data Eurostat



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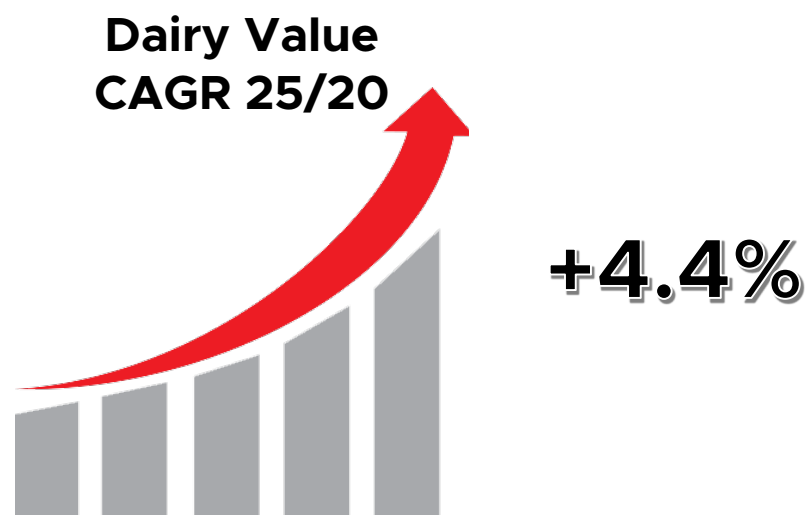
Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	80.2	85.5	89.2	95.6	103.5	99%	6.6%
Butter	0.9	1.0	1.0	1.0	1.1	1%	6.3%
Total	81.1	86.5	90.2	96.6	104.6	100%	6.6%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	210.7	240.8	257.4	292.9	330.4	98%	11.9%
Butter	3.6	4.8	5.7	5.1	6.0	2%	13.6%
Total	214.3	245.6	263.2	297.9	336.4	100%	11.9%



Source: elaboration on data Eurostat



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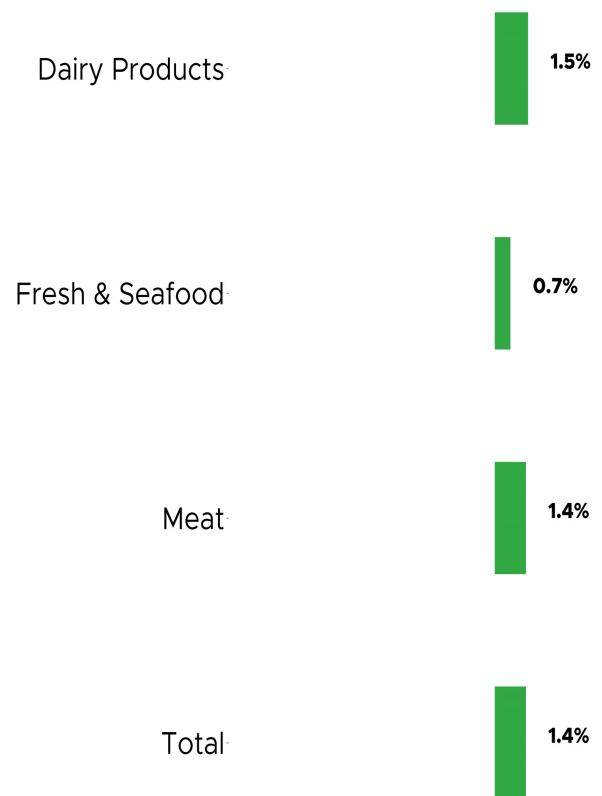
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	82.9	87.7	96.6	101.0	1.9%	1.5%
Fresh & Seafood	28.0	27.7	30.8	31.5	-0.4%	0.7%
Meat	210.9	222.4	249.2	259.6	1.8%	1.4%
Total	321.8	337.8	376.6	392.1	1.6%	1.4%

Volume 2020



Volume CAGR 23/20 (%)

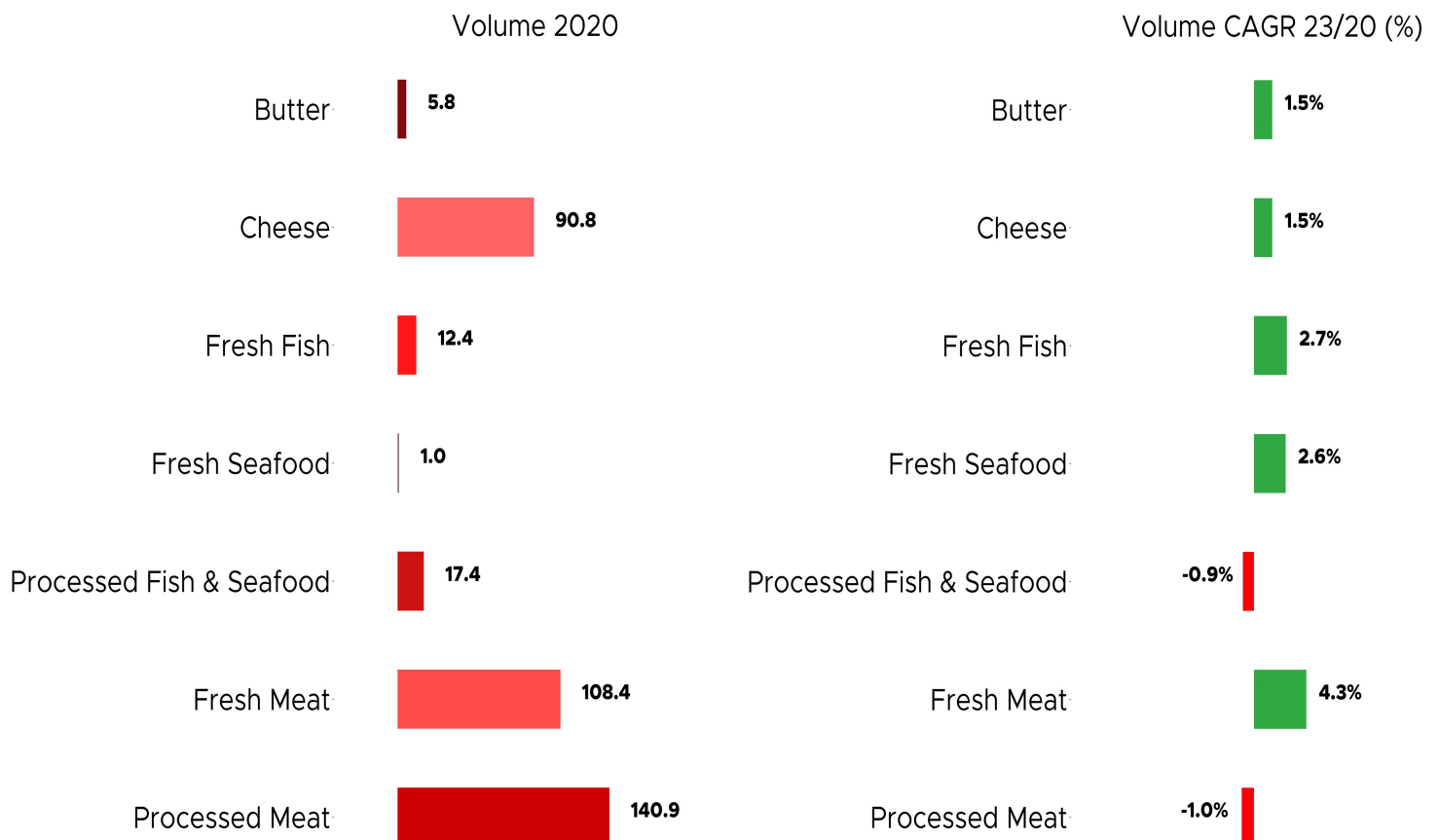




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Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	5.3	5.2	5.8	6.1	-0.6%	1.5%
Cheese	77.6	82.4	90.8	95.0	2.0%	1.5%
Fresh Fish	10.0	10.9	12.4	13.4	2.9%	2.7%
Fresh Seafood	0.8	0.9	1.0	1.1	2.4%	2.6%
Processed Fish & Seafood	17.2	15.9	17.4	17.0	-2.5%	-0.9%
Fresh Meat	79.6	93.9	108.4	122.9	5.7%	4.3%
Processed Meat	131.3	128.5	140.9	136.6	-0.7%	-1.0%





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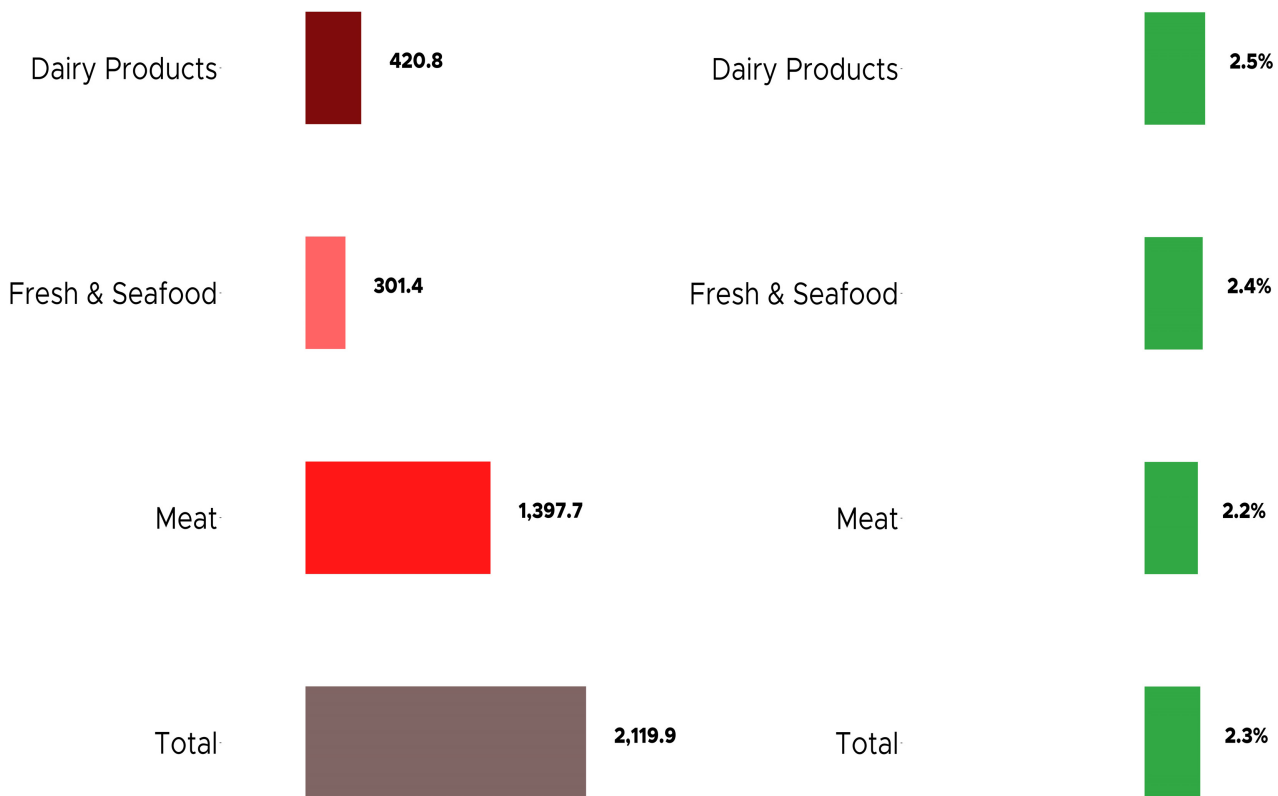
Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	344.1	377.3	420.8	452.8	3.1%	2.5%
Fresh & Seafood	241.1	266.0	301.4	323.5	3.3%	2.4%
Meat	1,126.1	1,235.8	1,397.7	1,492.2	3.1%	2.2%
Total	1,711.3	1,879.1	2,119.9	2,268.5	3.2%	2.3%

Revenues 2020



Volume CAGR 23/20 (%)





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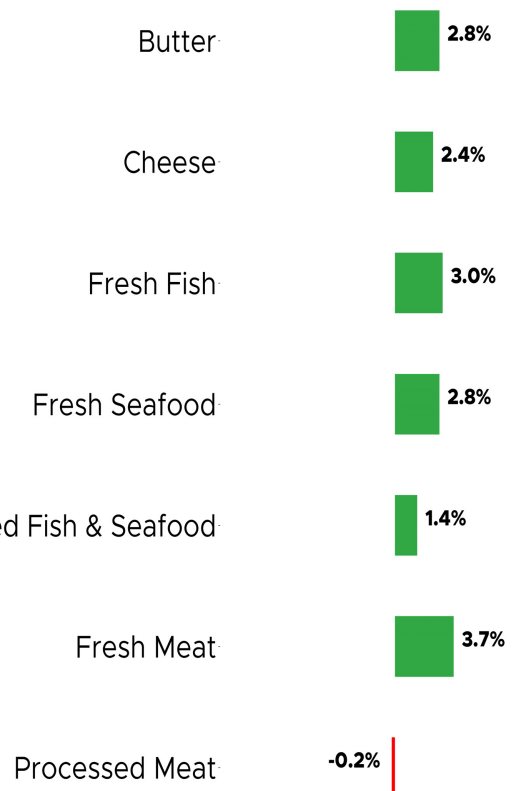
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	41.6	46.1	51.5	56.0	3.4%	2.8%
Cheese	302.5	331.2	369.2	396.9	3.1%	2.4%
Fresh Fish	125.2	140.7	160.4	175.3	4.0%	3.0%
Fresh Seafood	19.0	21.2	24.1	26.2	3.8%	2.8%
Processed Fish & Seafood	96.9	104.1	116.8	121.9	2.4%	1.4%
Fresh Meat	649.6	745.9	856.1	953.9	4.7%	3.7%
Processed Meat	476.5	489.9	541.6	538.3	0.9%	-0.2%

Revenues 2020



Revenue CAGR 23/20 (%)



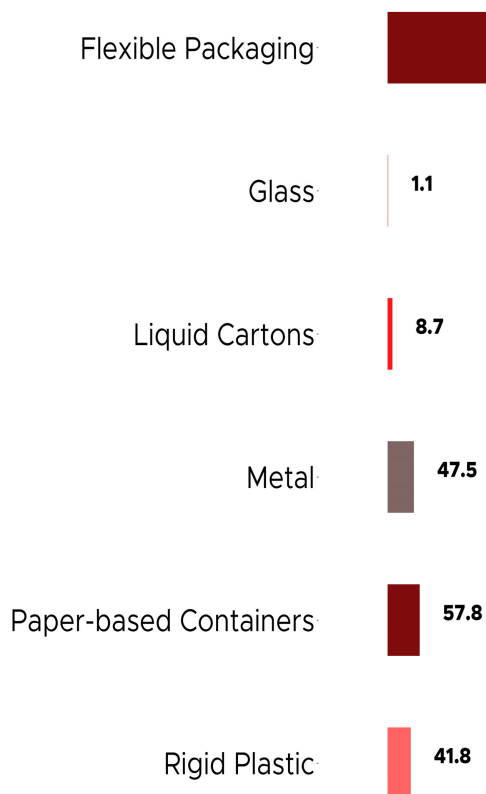


BULGARIA

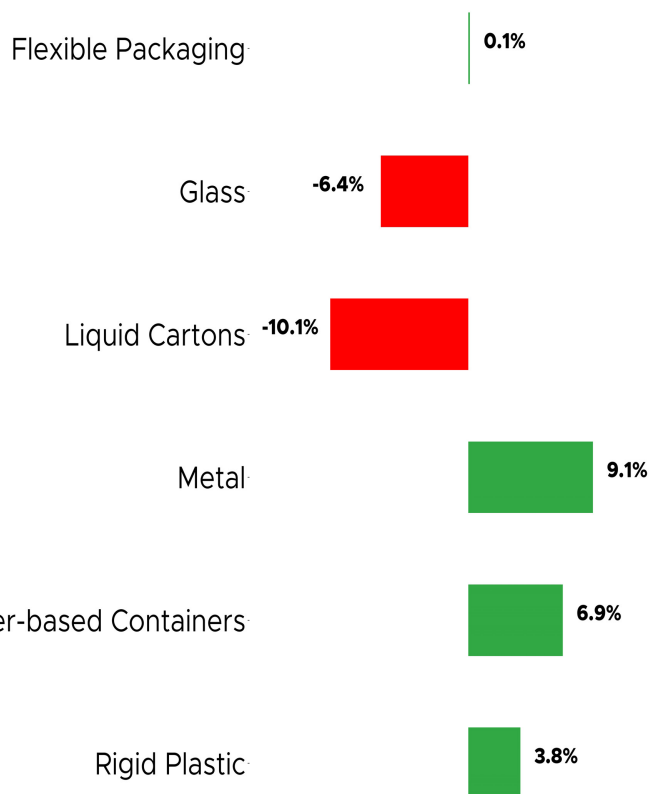
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	394.6	395.4	415.5	416.3	0.1%	0.1%
Glass	1.1	1.1	1.1	0.9	-0.0%	-6.4%
Liquid Cartons	10.6	9.3	8.7	6.4	-4.3%	-10.1%
Metal	27.3	41.6	47.5	61.7	15.1%	9.1%
Paper-based Containers	38.5	51.8	57.8	70.6	10.5%	6.9%
Rigid Plastic	35.4	38.9	41.8	46.7	3.2%	3.8%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



CROATIA



Consumers
4,047,200

CAGR 15/20

-0.8%

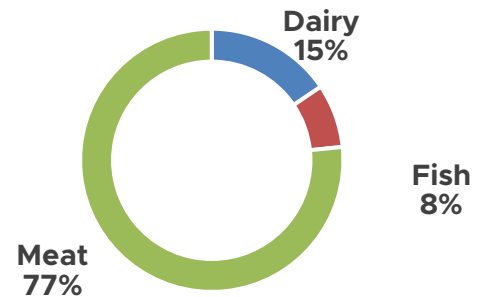
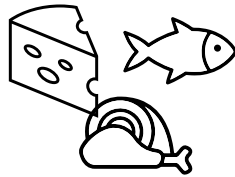


Gdp per capita
11.754 €

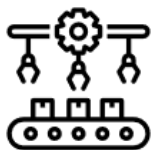
CAGR 15/20

+3.3%

Fresh food processing



Most growing category 16/20
Fish +17,66% per year



Food processing & packaging machinery market
35,7 mln €

Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



CROATIA

Meat Processing



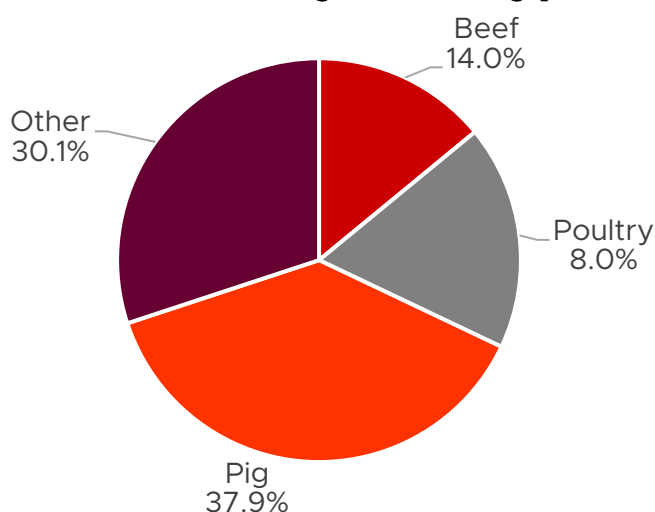
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	115.6	112.4	128.6	133.0	129.3	50%	2.85%
Processed+Sausage	83.4	86.1	87.4	93.2	92.1	36%	2.52%
Frozen	7.1	10.6	9.3	8.2	7.3	3%	0.58%
Others	31.7	32.6	29.8	29.1	30.7	12%	-0.77%
Total	237.8	241.6	255.1	263.5	259.4	100%	2.20%

Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	346.3	342.0	371.9	409.1	387.0	47%	2.82%
Processed+Sausage	326.9	360.2	358.1	410.4	408.9	50%	5.75%
Frozen	16.3	19.9	13.6	6.7	6.1	1%	-21.61%
Others	18.9	21.4	18.2	23.6	22.5	3%	4.54%
Total	708.3	743.5	761.8	849.8	824.6	100%	3.87%

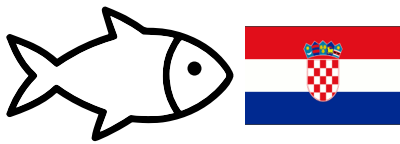
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



CROATIA

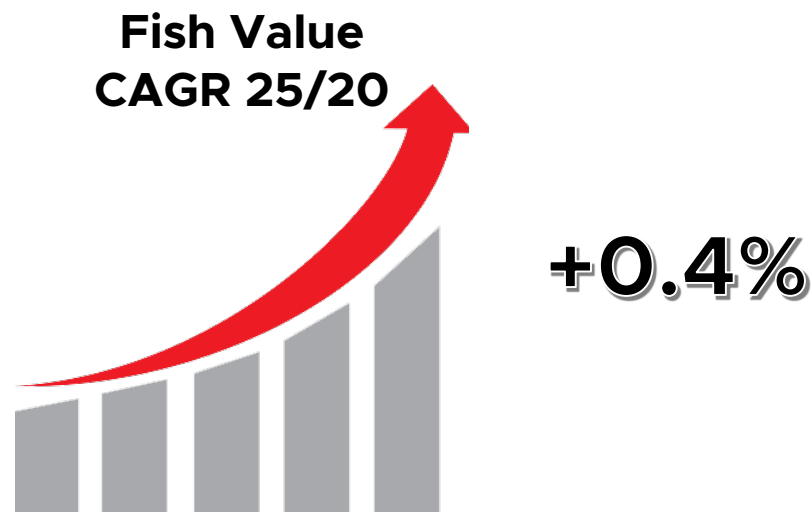
Fish Processing

Fish Volume by categories (mln Kg)

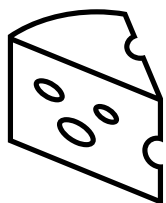
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	0.0	0.0	0.2	1.0	3%	464.2%
Frozen	12.7	12.8	12.1	11.2	15.3	51%	4.7%
Processed	11.1	10.3	10.0	11.7	13.7	46%	5.3%
Total	23.8	23.1	22.2	23.0	30.0	100%	5.9%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	0.0	0.0	3.1	8.9	11%	372.4%
Frozen	9.2	9.6	11.2	12.8	17.5	21%	17.4%
Processed	34.7	36.4	36.3	45.7	57.8	69%	13.6%
Total	43.9	46.0	47.5	61.7	84.2	100%	17.7%



Source: elaboration on data Eurostat



CROATIA

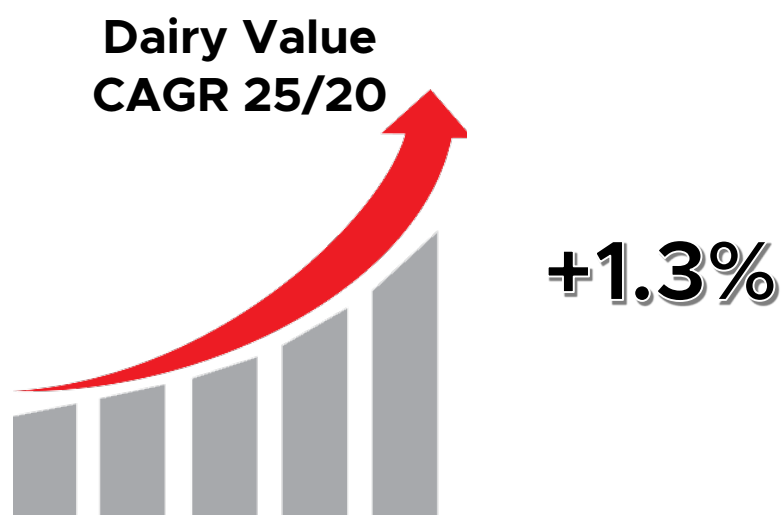
Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	35.0	33.6	32.5	30.8	31.8	77%	-2.4%
Butter	8.7	9.0	8.6	8.5	9.3	23%	1.7%
Total	43.7	42.6	41.1	39.4	41.1	100%	-1.5%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	131.1	134.4	126.8	123.5	125.6	75%	-1.1%
Butter	36.9	41.7	41.0	41.1	41.8	25%	3.1%
Total	168.0	176.1	167.8	164.6	167.3	100%	-0.1%



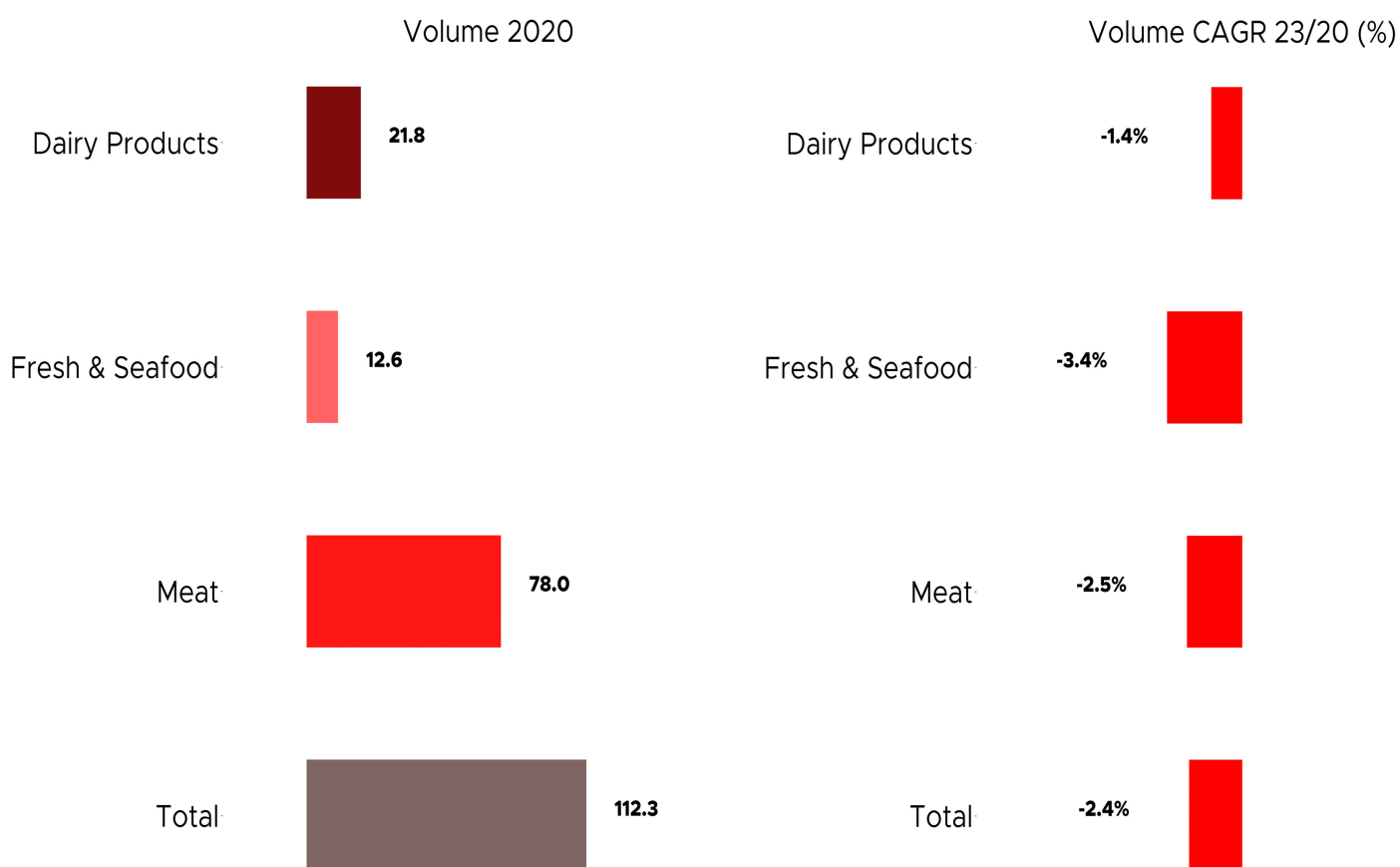
Source: elaboration on data Eurostat



CROATIA

Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	19.9	20.1	21.8	20.9	0.4%	-1.4%
Fresh & Seafood	12.8	11.7	12.6	11.3	-3.0%	-3.4%
Meat	73.0	71.6	78.0	72.3	-0.7%	-2.5%
Total	105.7	103.4	112.3	104.5	-0.7%	-2.4%

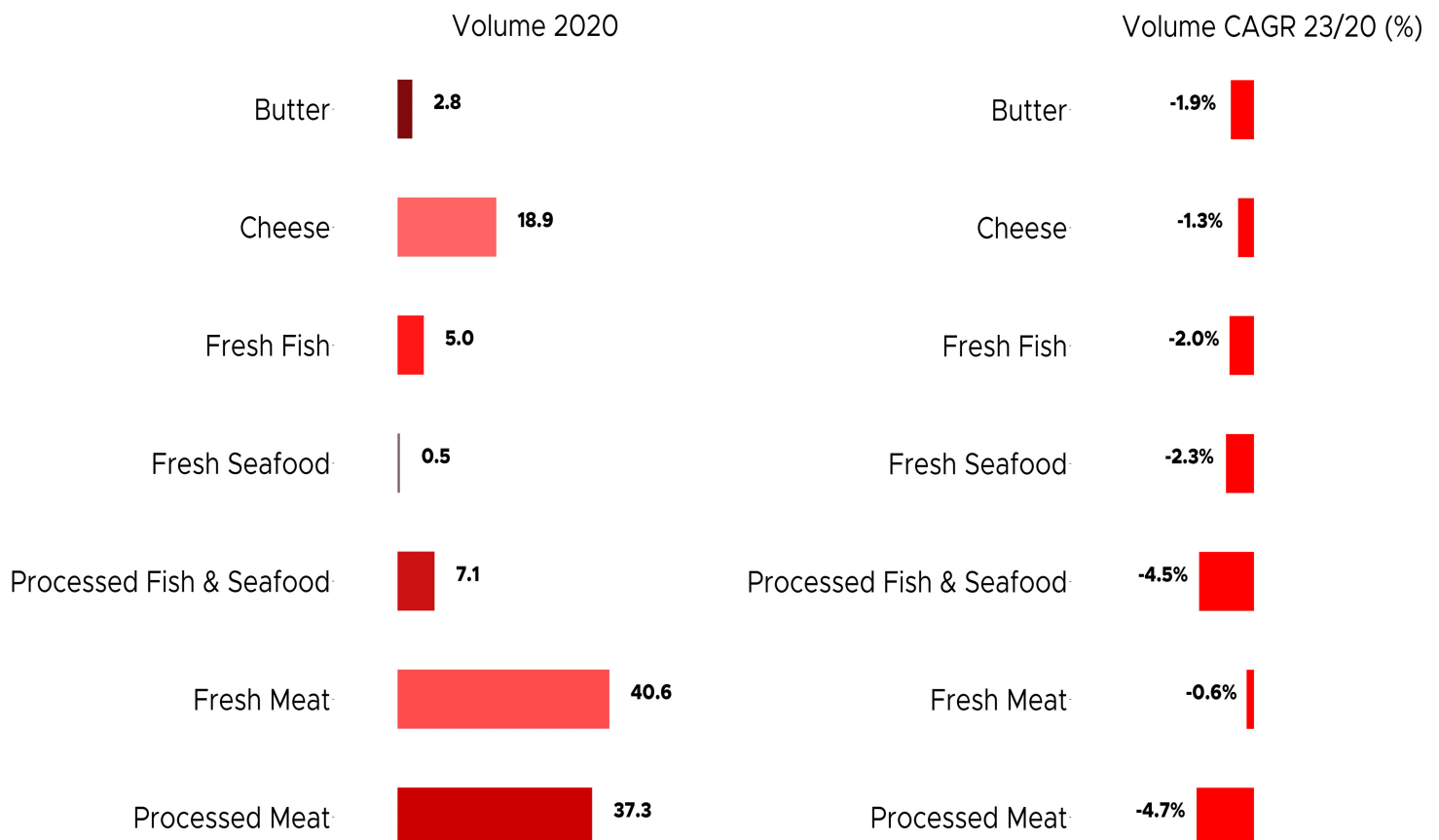




CROATIA

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	2.7	2.6	2.8	2.7	-1.5%	-1.9%
Cheese	17.2	17.5	18.9	18.2	0.7%	-1.3%
Fresh Fish	4.7	4.6	5.0	4.7	-1.1%	-2.0%
Fresh Seafood	0.4	0.4	0.5	0.4	-0.8%	-2.3%
Processed Fish & Seafood	7.7	6.7	7.1	6.2	-4.4%	-4.5%
Fresh Meat	35.2	36.5	40.6	39.9	1.3%	-0.6%
Processed Meat	37.9	35.1	37.3	32.4	-2.5%	-4.7%





CROATIA



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	171.7	172.5	186.1	177.9	0.1%	-1.5%
Fresh & Seafood	121.8	123.1	135.0	127.9	0.3%	-1.8%
Meat	562.4	565.3	618.9	583.4	0.2%	-2.0%
Total	855.9	860.8	940.0	889.2	0.2%	-1.8%

Revenues 2020

Volume CAGR 23/20 (%)





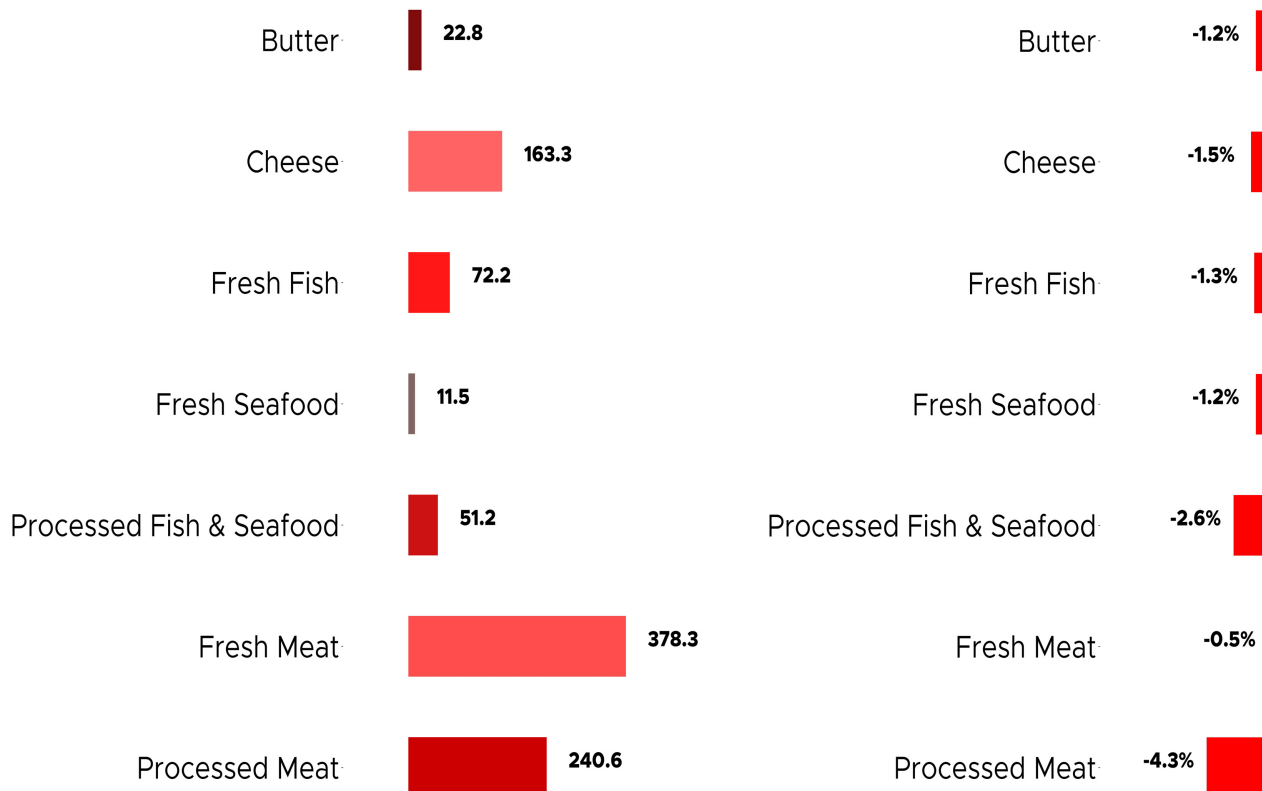
CROATIA

Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	20.8	21.1	22.8	22.0	0.4%	-1.2%
Cheese	150.9	151.4	163.3	155.9	0.1%	-1.5%
Fresh Fish	63.8	65.5	72.2	69.5	0.9%	-1.3%
Fresh Seafood	10.2	10.4	11.5	11.1	0.9%	-1.2%
Processed Fish & Seafood	47.9	47.1	51.2	47.3	-0.5%	-2.6%
Fresh Meat	323.3	340.4	378.3	372.5	1.7%	-0.5%
Processed Meat	239.1	224.9	240.6	210.9	-2.0%	-4.3%

Revenues 2020

Revenue CAGR 23/20 (%)



CZECH REP.



Consumers
10,698,896

CAGR 15/20

+0.3%

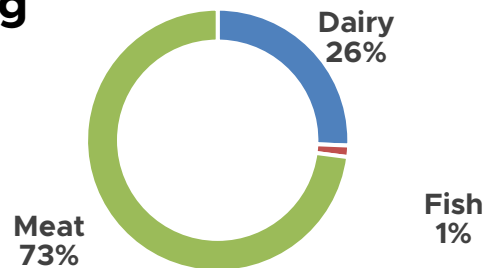
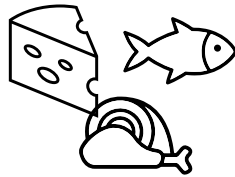


Gdp per capita
19.348 €

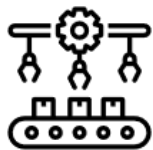
CAGR 15/20

+5.0%

Fresh food processing



Most growing category 16/20
Fish +12.25% per year



Food processing & packaging machinery market
86,8 mln €

Packaging type

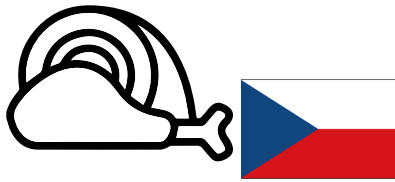
Most consumed
Flexible
Packaging 45.7%



Most growing 20/23
Rigid Plastic
+88.43 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



CZECH REP.

Meat Processing



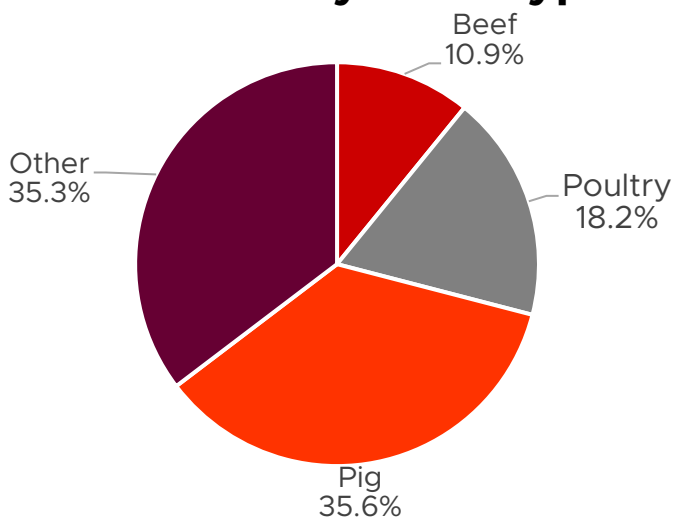
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	375.3	388.8	394.2	396.9	403.4	51%	1.82%
Processed+Sausage	301.0	318.1	299.8	298.2	285.6	36%	-1.30%
Frozen	28.3	29.5	26.1	27.9	24.5	3%	-3.50%
Others	63.0	68.9	74.8	79.6	79.6	10%	6.03%
Total	767.5	805.3	794.9	802.8	793.0	100%	0.82%

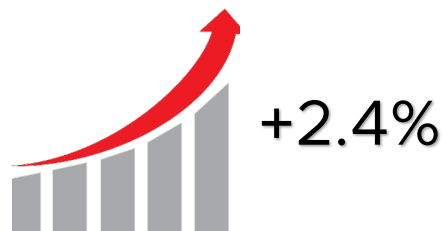
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	860.0	931.3	966.9	1,029.7	1,028.0	51%	4.56%
Processed+Sausage	740.1	800.0	787.0	847.3	879.9	44%	4.42%
Frozen	40.6	43.6	39.1	37.8	32.6	2%	-5.35%
Others	59.9	72.7	90.2	96.9	80.4	4%	7.62%
Total	1,700.5	1,847.5	1,883.2	2,011.6	2,020.8	100%	4.41%

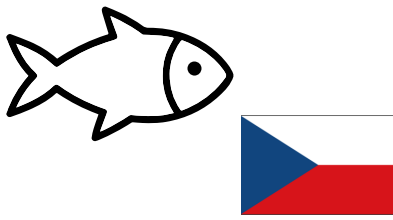
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



CZECH REP.

Fish Processing

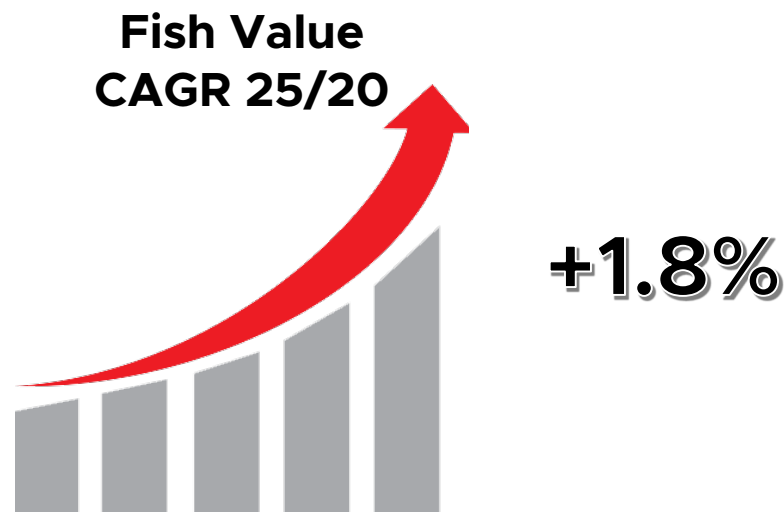


Fish Volume by categories (mln Kg)

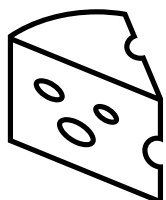
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	1.0	0.8	0.9	1.9	1.7	16%	14.4%
Frozen	4.2	9.9	5.7	8.7	4.6	45%	2.8%
Processed	2.1	5.8	4.1	4.1	4.1	39%	18.4%
Total	7.2	16.5	10.7	14.7	10.4	100%	9.6%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	4.7	4.9	5.4	10.8	9.8	25%	20.2%
Frozen	13.7	18.6	19.6	18.7	16.7	43%	5.2%
Processed	6.1	17.5	12.2	12.2	12.2	32%	19.2%
Total	24.4	41.0	37.3	41.8	38.8	100%	12.3%



Source: elaboration on data Eurostat



CZECH REP.

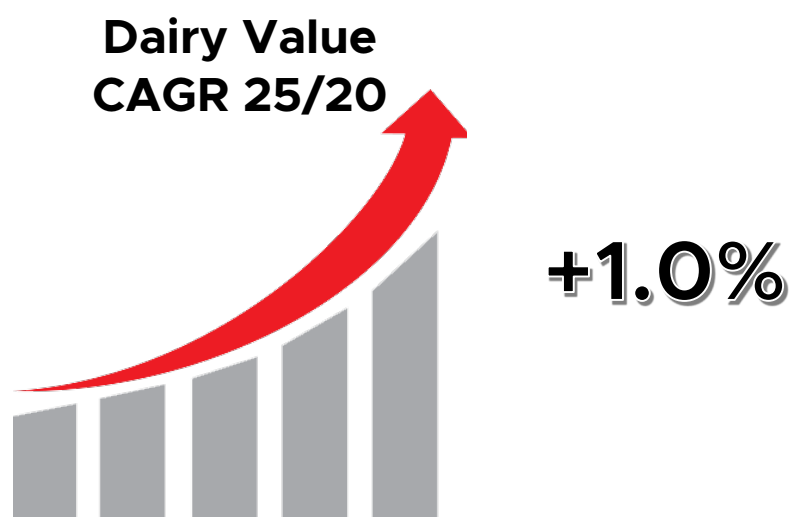
Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	155.3	158.7	163.7	172.4	183.5	83%	4.3%
Butter	49.9	46.4	35.4	38.0	37.5	17%	-6.9%
Total	205.2	205.1	199.0	210.4	221.0	100%	1.9%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	449.7	490.4	536.6	550.9	578.3	81%	6.5%
Butter	151.4	177.4	141.6	140.6	132.2	19%	-3.3%
Total	601.1	667.8	678.2	691.6	710.5	100%	4.3%



Source: elaboration on data Eurostat



CZECH REP.

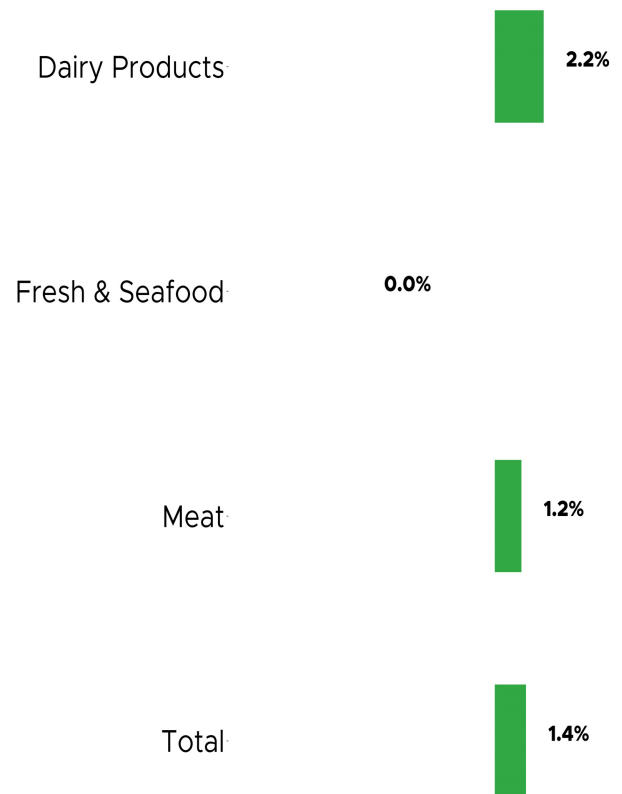
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	136.8	157.0	174.4	186.4	4.7%	2.2%
Fresh & Seafood	47.9	47.5	52.6	52.6	-0.3%	0.0%
Meat	475.8	519.7	582.6	604.6	3.0%	1.2%
Total	660.5	724.2	809.7	843.6	3.1%	1.4%

Volume 2020



Volume CAGR 23/20 (%)





CZECH REP.

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	15.5	14.9	16.4	16.5	-1.2%	0.3%
Cheese	121.3	142.1	158.0	169.9	5.4%	2.4%
Fresh Fish	22.4	22.7	25.4	26.0	0.5%	0.7%
Fresh Seafood	2.5	2.5	2.8	2.8	0.1%	0.4%
Processed Fish & Seafood	23.1	22.3	24.4	23.9	-1.2%	-0.8%
Fresh Meat	214.8	254.7	292.7	325.0	5.8%	3.6%
Processed Meat	261.0	265.0	289.9	279.5	0.5%	-1.2%





CZECH REP.



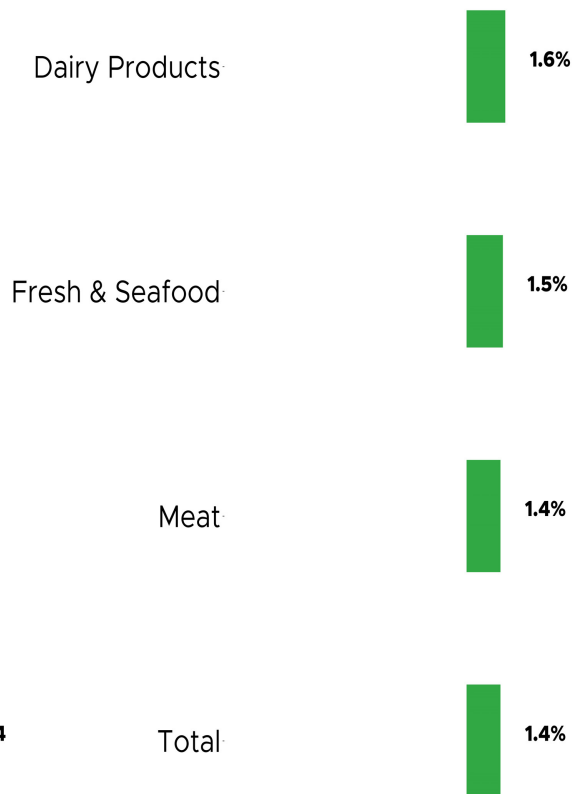
Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	806.5	877.5	971.7	1,020.2	2.9%	1.6%
Fresh & Seafood	580.7	634.9	714.1	747.4	3.0%	1.5%
Meat	2,676.1	2,911.5	3,267.6	3,402.1	2.9%	1.4%
Total	4,063.3	4,423.9	4,953.4	5,169.7	2.9%	1.4%

Revenues 2020



Volume CAGR 23/20 (%)





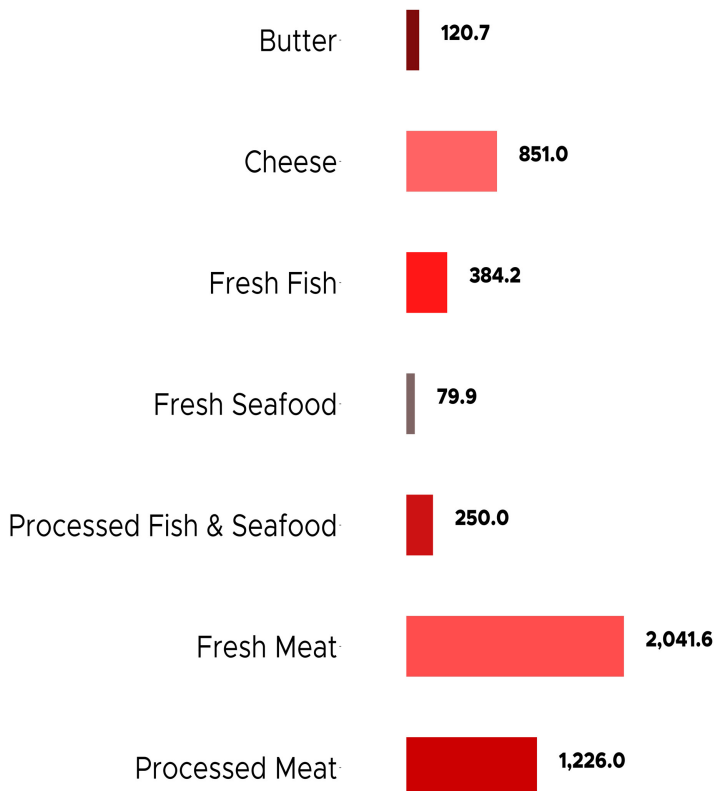
CZECH REP.



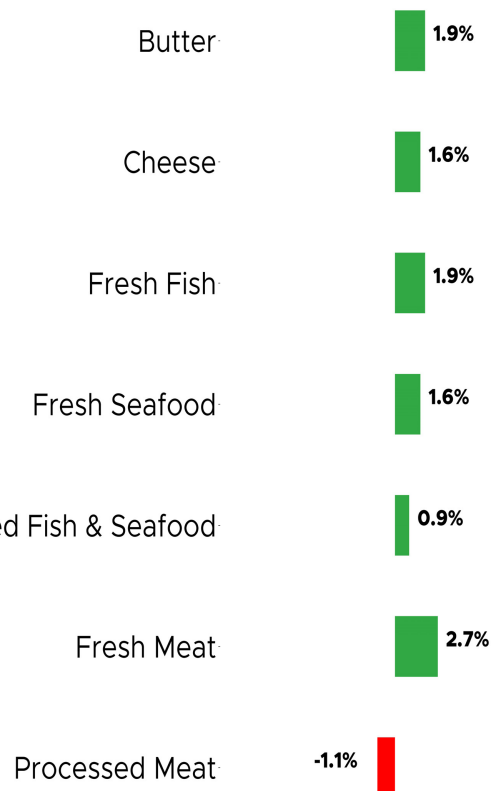
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	99.1	108.7	120.7	127.8	3.1%	1.9%
Cheese	707.4	768.8	851.0	892.4	2.8%	1.6%
Fresh Fish	307.6	340.2	384.2	406.9	3.4%	1.9%
Fresh Seafood	64.8	71.0	79.9	83.7	3.1%	1.6%
Processed Fish & Seafood	208.4	223.7	250.0	256.8	2.4%	0.9%
Fresh Meat	1,578.8	1,793.1	2,041.6	2,214.5	4.3%	2.7%
Processed Meat	1,097.3	1,118.4	1,226.0	1,187.6	0.6%	-1.1%

Revenues 2020



Revenue CAGR 23/20 (%)





CZECH REP.

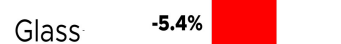
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	755.8	797.5	837.1	848.2	1.8%	0.4%
Glass	3.4	2.9	2.8	2.4	-5.1%	-5.4%
Liquid Cartons	63.5	63.7	64.8	61.3	0.1%	-1.8%
Metal	30.8	44.5	52.6	79.9	13.0%	15.0%
Paper-based Containers	157.0	154.2	156.9	153.6	-0.6%	-0.7%
Rigid Plastic	486.1	567.1	621.0	709.4	5.3%	4.5%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



EGYPT



Consumers

102,334,403

CAGR 15/20

+2.1%



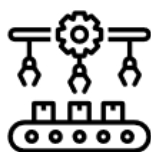
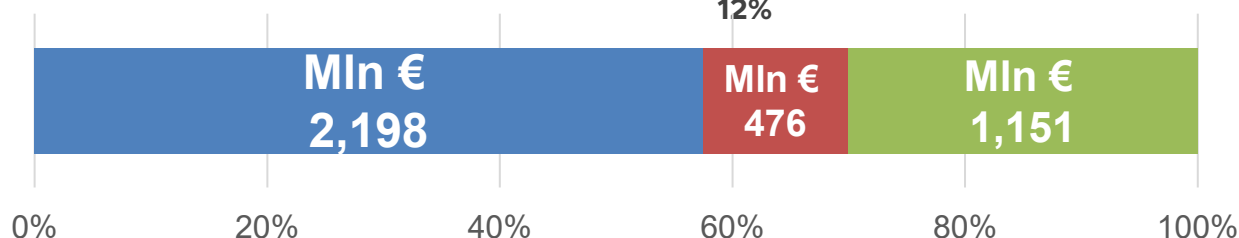
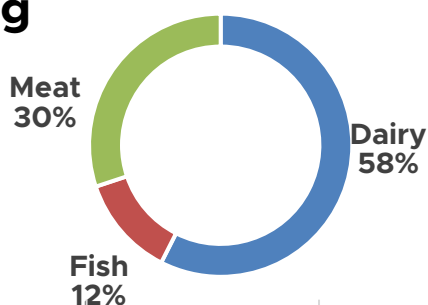
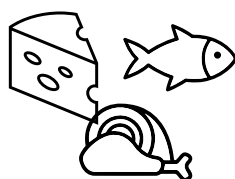
Gdp per capita

3.016 €

CAGR 15/20

-0.1%

Fresh food processing



Food processing & packaging machinery market

115,2 mln €

Packaging type

Most consumed

Flexible
Packaging 34.4%



Most growing 20/23

Flexible
Packaging
+51.98 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



EGYPT

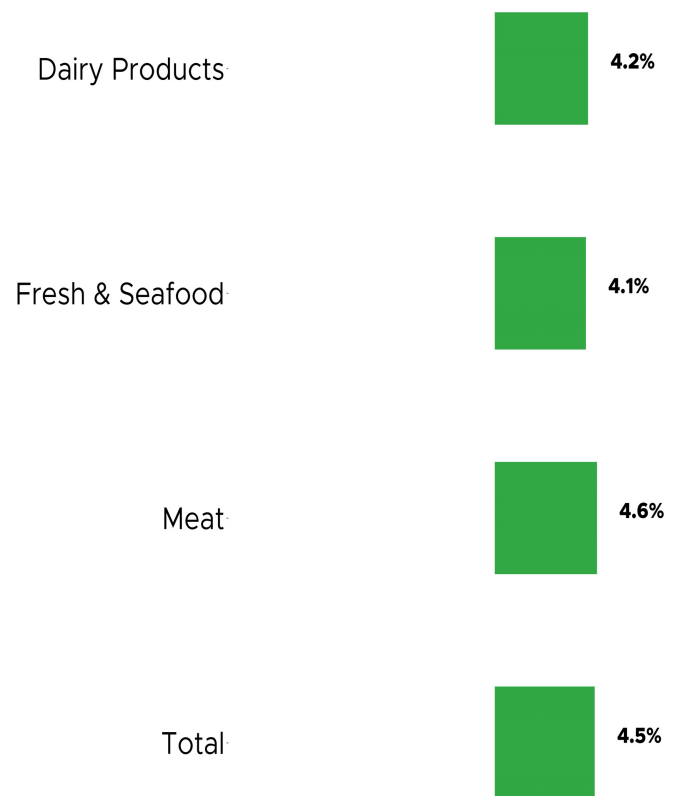
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	203.0	194.5	226.8	256.5	-1.4%	4.2%
Fresh & Seafood	540.5	525.5	630.8	712.5	-0.9%	4.1%
Meat	2,886.3	2,937.6	3,532.2	4,037.4	0.6%	4.6%
Total	3,629.8	3,657.6	4,389.8	5,006.4	0.3%	4.5%

Volume 2020



Volume CAGR 23/20 (%)

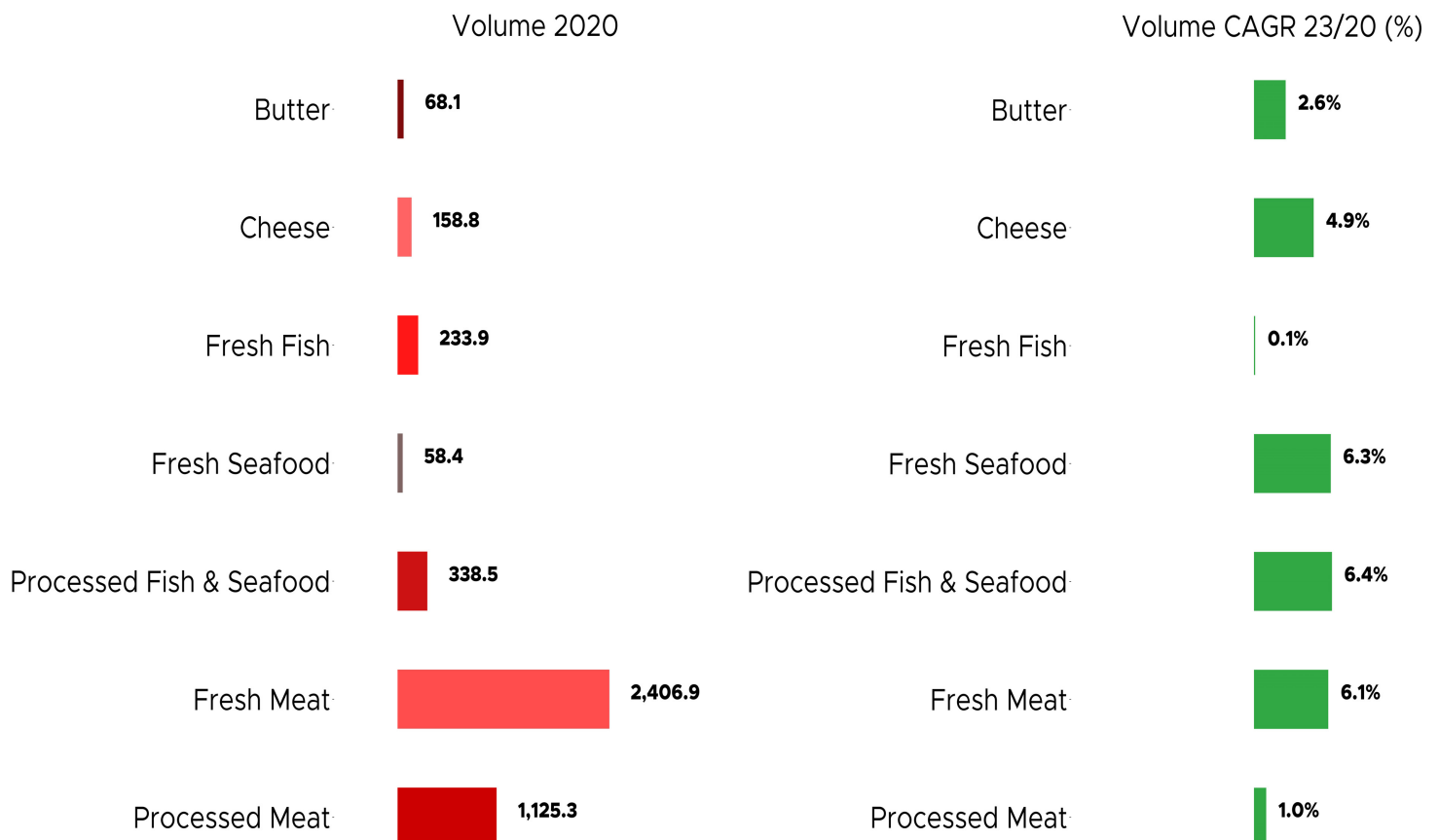




EGYPT

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	62.0	59.2	68.1	73.4	-1.6%	2.6%
Cheese	140.9	135.3	158.8	183.1	-1.3%	4.9%
Fresh Fish	231.9	202.8	233.9	234.8	-4.4%	0.1%
Fresh Seafood	43.2	47.4	58.4	70.2	3.1%	6.3%
Processed Fish & Seafood	265.4	275.3	338.5	407.5	1.2%	6.4%
Fresh Meat	1,779.2	1,971.1	2,406.9	2,876.3	3.5%	6.1%
Processed Meat	1,107.1	966.6	1,125.3	1,161.1	-4.4%	1.0%





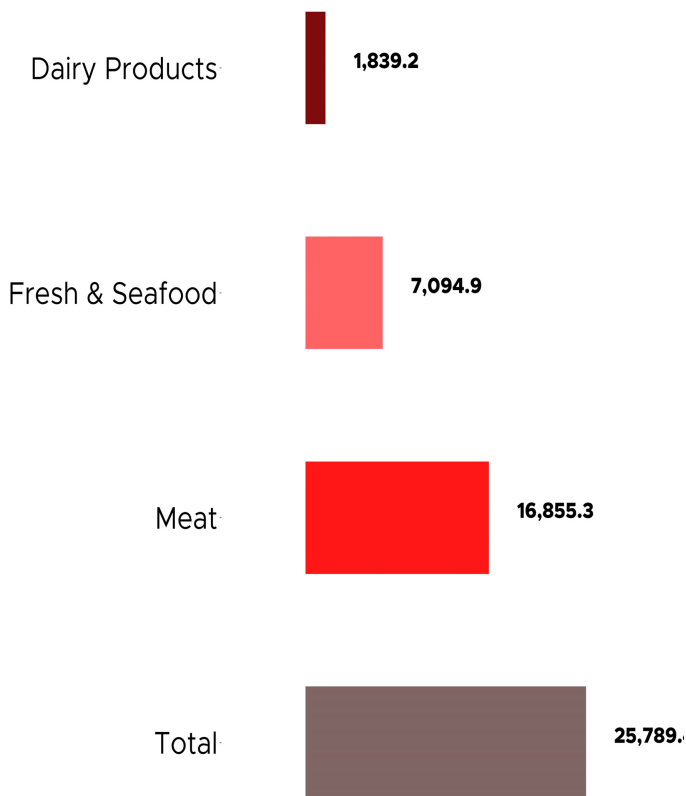
EGYPT



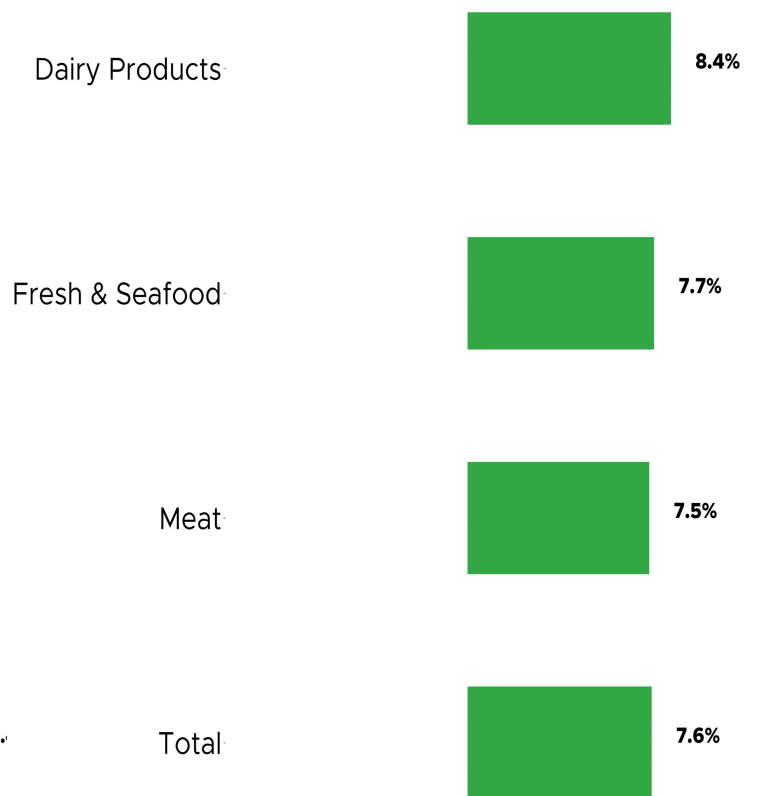
Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	1,194.5	1,510.0	1,839.2	2,345.3	8.1%	8.4%
Fresh & Seafood	4,539.6	5,699.2	7,094.9	8,867.0	7.9%	7.7%
Meat	10,863.0	13,563.8	16,855.3	20,951.9	7.7%	7.5%
Total	16,597.1	20,773.0	25,789.4	32,164.2	7.8%	7.6%

Revenues 2020



Volume CAGR 23/20 (%)





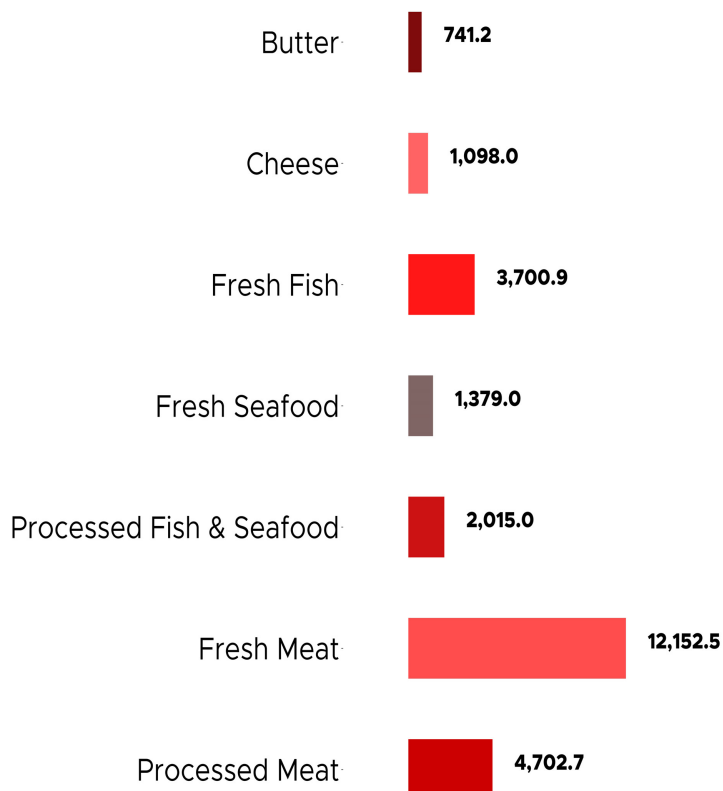
EGYPT



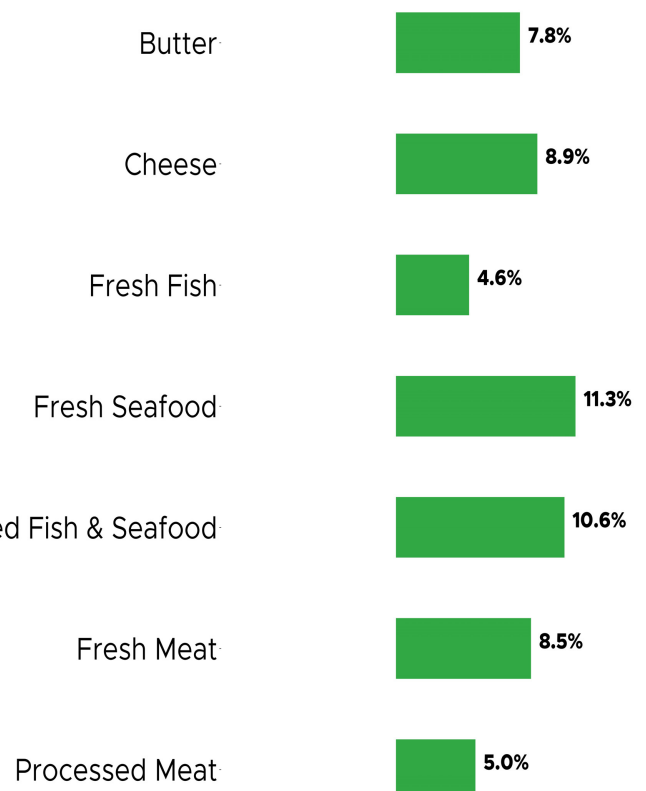
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	493.0	612.1	741.2	928.6	7.5%	7.8%
Cheese	701.5	897.8	1,098.0	1,416.7	8.6%	8.9%
Fresh Fish	2,682.8	3,064.2	3,700.9	4,239.9	4.5%	4.6%
Fresh Seafood	733.7	1,064.8	1,379.0	1,903.4	13.2%	11.3%
Processed Fish & Seafood	1,123.2	1,570.2	2,015.0	2,723.8	11.8%	10.6%
Fresh Meat	7,554.2	9,692.7	12,152.5	15,508.3	8.7%	8.5%
Processed Meat	3,308.9	3,871.2	4,702.7	5,443.6	5.4%	5.0%

Revenues 2020



Revenue CAGR 23/20 (%)



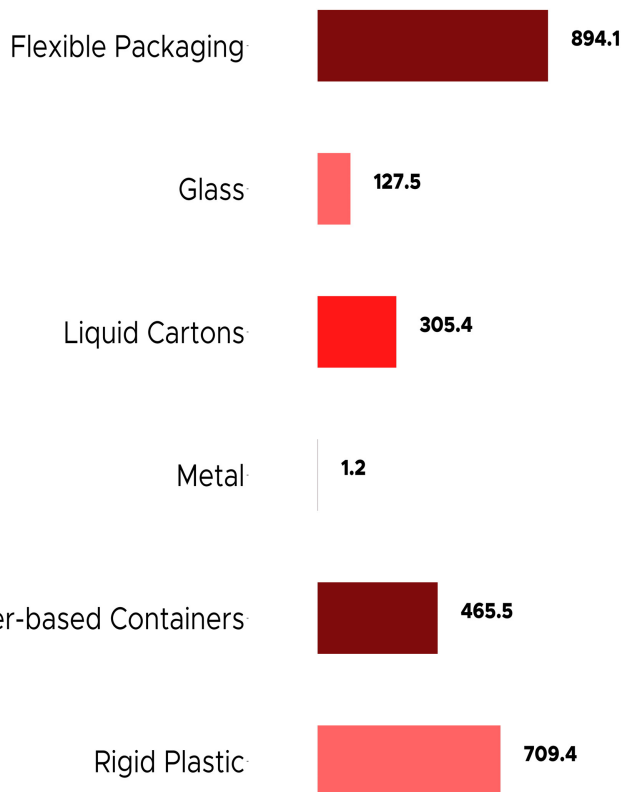


EGYPT

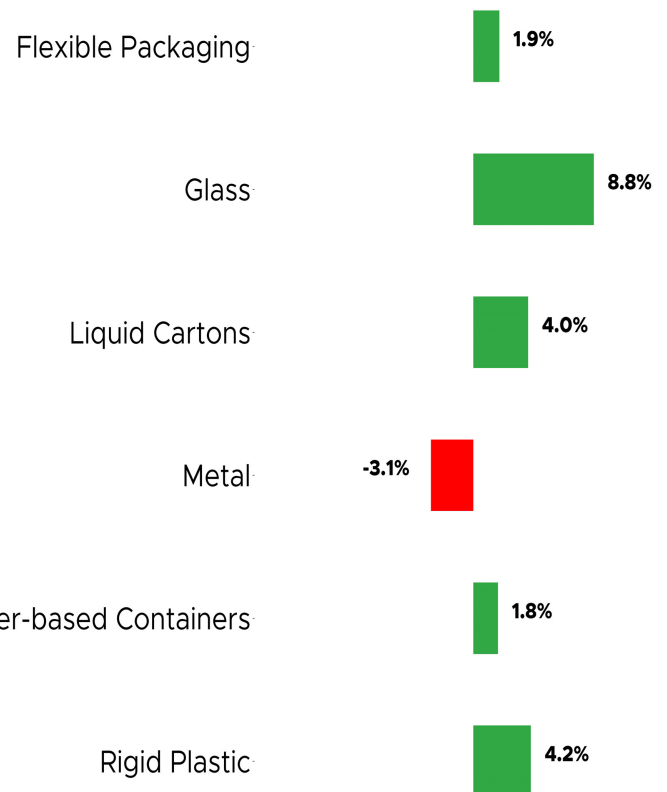
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	1,028.1	869.3	894.1	946.1	-5.4%	1.9%
Glass	109.5	116.2	127.5	164.3	2.0%	8.8%
Liquid Cartons	261.7	295.0	305.4	343.2	4.1%	4.0%
Metal	1.4	1.3	1.2	1.1	-2.8%	-3.1%
Paper-based Containers	512.0	457.1	465.5	490.6	-3.7%	1.8%
Rigid Plastic	642.8	682.8	709.4	803.6	2.0%	4.2%

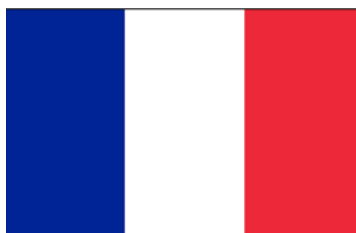
Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



FRANCE



Consumers
67,391,582

CAGR 15/20

+0.3%

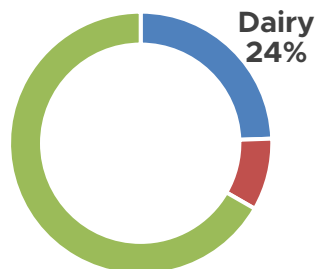
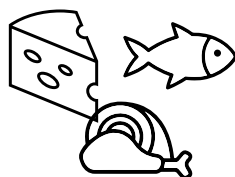


Gdp per capita
32.831 €

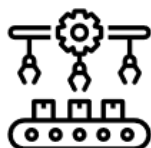
CAGR 15/20

+1.1%

Fresh food processing



Most growing category 16/20
Fish +7.48% per year



Food processing & packaging machinery market
825,8 mln €

Packaging type

Most consumed
Flexible
Packaging 77.4%



Most growing 20/23
Glass
+9.5 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



FRANCE

Meat Processing

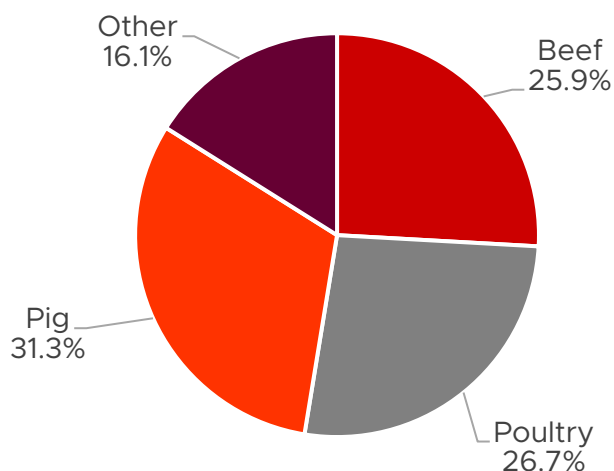
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	3,742.8	3,787.8	3,735.2	3,591.7	3,654.6	50%	-0.59%
Processed+Sausage	1,283.9	1,276.1	1,281.1	1,270.3	1,228.6	17%	-1.09%
Frozen	739.7	695.5	728.1	801.9	760.5	10%	0.70%
Others	1,559.4	1,585.1	1,550.1	1,505.3	1,649.6	23%	1.41%
Total	7,325.7	7,344.6	7,294.5	7,169.1	7,293.2	100%	-0.11%

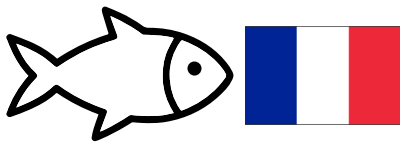
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	14,235.6	14,422.1	14,115.4	14,309.4	14,814.3	55%	1.00%
Processed+Sausage	7,495.5	7,533.4	7,691.1	7,911.3	8,102.4	30%	1.97%
Frozen	2,169.5	2,224.8	2,028.1	2,371.4	2,444.6	9%	3.03%
Others	1,267.9	1,643.2	1,652.8	1,624.0	1,729.8	6%	8.08%
Total	25,168.5	25,823.5	25,487.3	26,216.1	27,091.1	100%	1.86%

Shares 2020 by meat type



Source: elaboration on data Eurostat



FRANCE

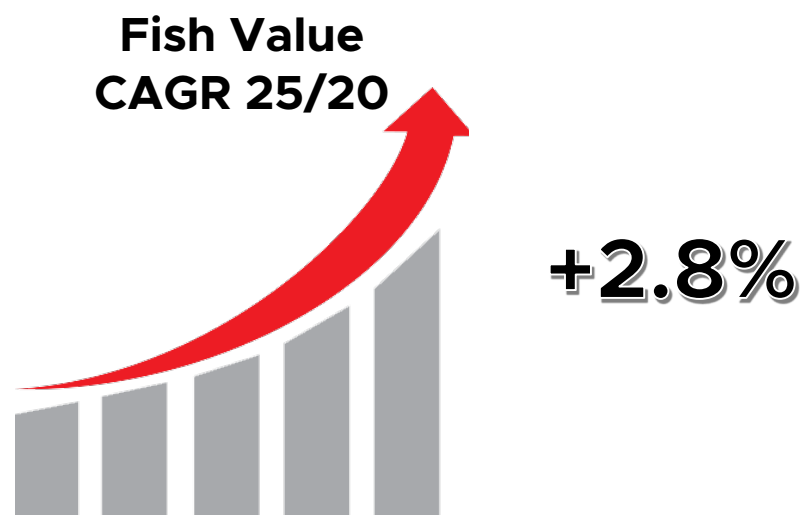
Fish Processing

Fish Volume by Categories (mln Kg)

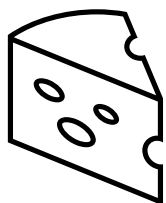
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	54.4	65.8	67.3	67.3	128.0	27%	23.8%
Frozen	17.4	21.0	25.1	28.6	32.8	7%	17.1%
Processed	270.6	265.2	252.6	309.8	314.4	66%	3.8%
Total	342.4	352.0	345.1	405.7	475.2	100%	8.5%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	468.6	550.1	576.3	589.0	1,126.2	31%	24.5%
Frozen	100.9	138.5	147.9	164.5	185.2	5%	16.4%
Processed	2,124.7	2,110.6	1,962.1	2,294.9	2,283.8	64%	1.8%
Total	2,694.1	2,799.3	2,686.4	3,048.4	3,595.2	100%	7.5%



Source: elaboration on data Eurostat



FRANCE

Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	1,065.2	1,068.7	1,116.7	2,820.6	2,899.2	85%	28.4%
Butter	528.5	505.4	484.1	490.8	503.8	15%	-1.2%
Total	1,593.6	1,574.1	1,600.8	3,311.4	3,403.0	100%	20.9%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	8,250.0	8,497.5	8,589.7	7,106.3	7,644.1	77%	-1.9%
Butter	1,733.9	2,101.4	2,319.3	2,299.6	2,282.6	23%	7.1%
Total	9,983.9	10,598.9	10,909.0	9,405.9	9,926.7	100%	-0.1%

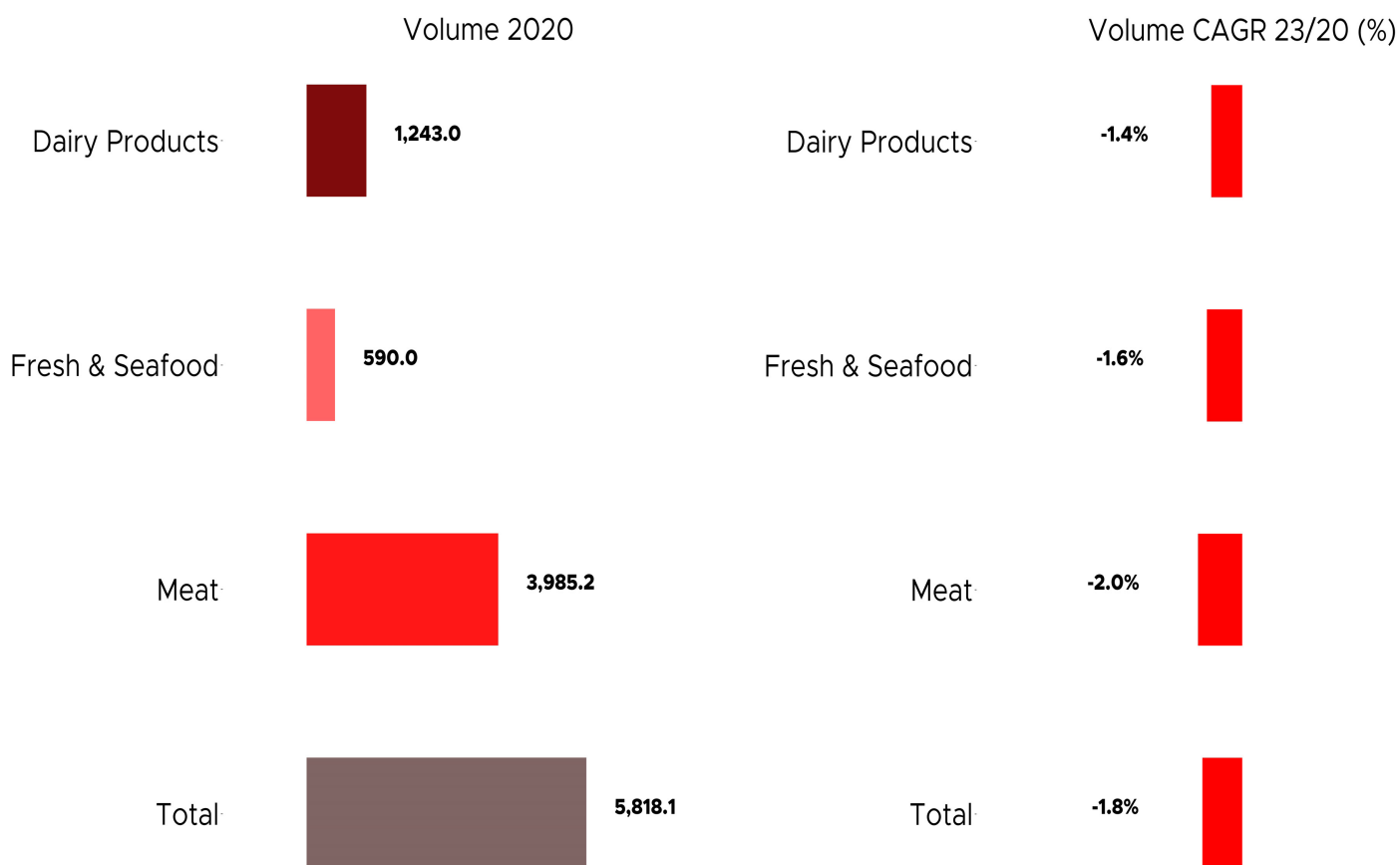
Source: elaboration on data Eurostat



FRANCE

Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	1,170.0	1,150.2	1,243.0	1,191.5	-0.6%	-1.4%
Fresh & Seafood	545.2	533.1	590.0	561.7	-0.8%	-1.6%
Meat	3,730.6	3,612.9	3,985.2	3,750.6	-1.1%	-2.0%
Total	5,445.8	5,296.2	5,818.1	5,503.9	-0.9%	-1.8%

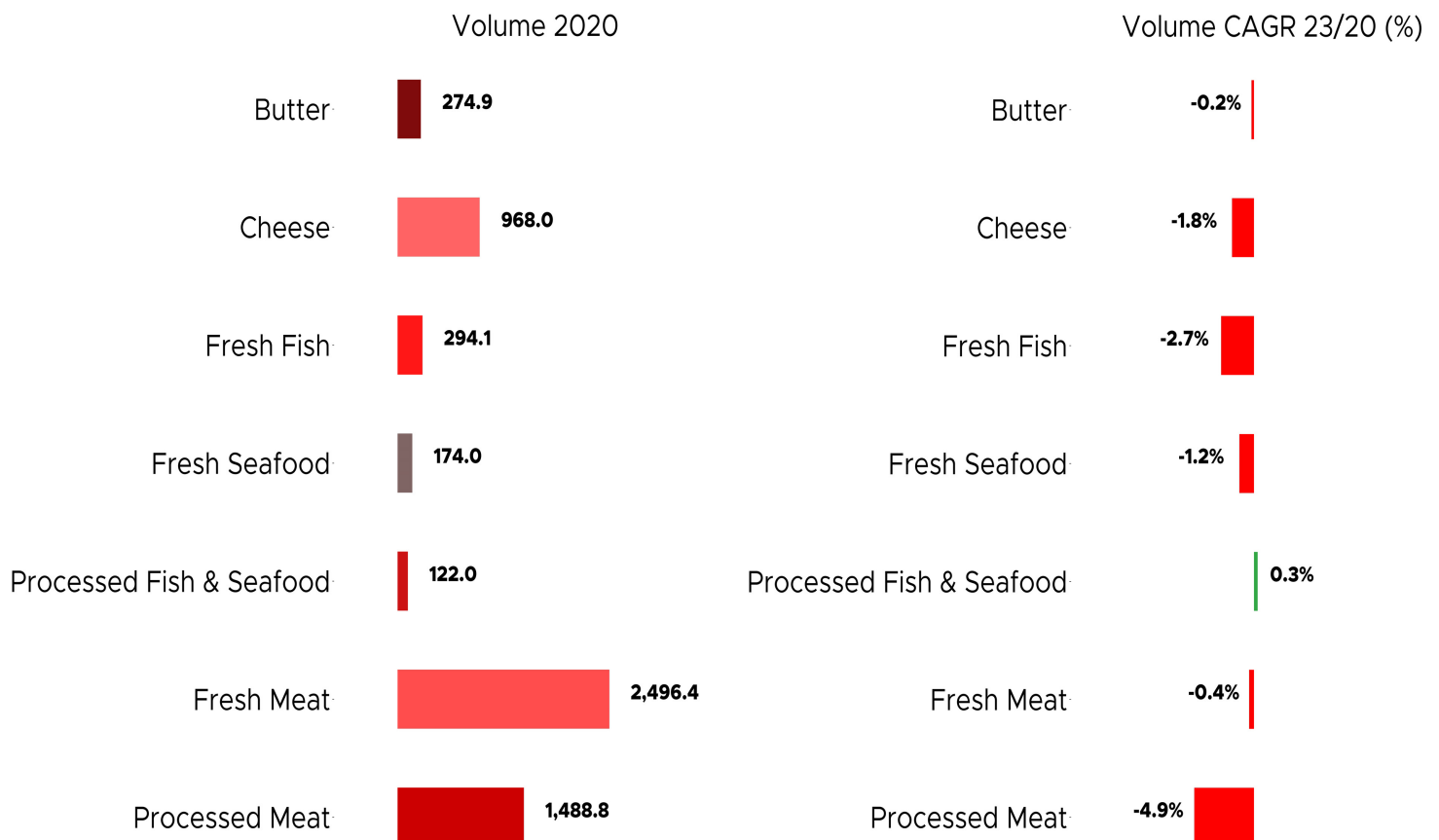




FRANCE

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	245.7	250.8	274.9	273.6	0.7%	-0.2%
Cheese	924.3	899.5	968.0	918.0	-0.9%	-1.8%
Fresh Fish	286.2	268.4	294.1	271.1	-2.1%	-2.7%
Fresh Seafood	159.2	156.4	174.0	167.7	-0.6%	-1.2%
Processed Fish & Seafood	99.8	108.3	122.0	123.0	2.8%	0.3%
Fresh Meat	2,172.3	2,220.2	2,496.4	2,470.1	0.7%	-0.4%
Processed Meat	1,558.3	1,392.7	1,488.8	1,280.5	-3.7%	-4.9%



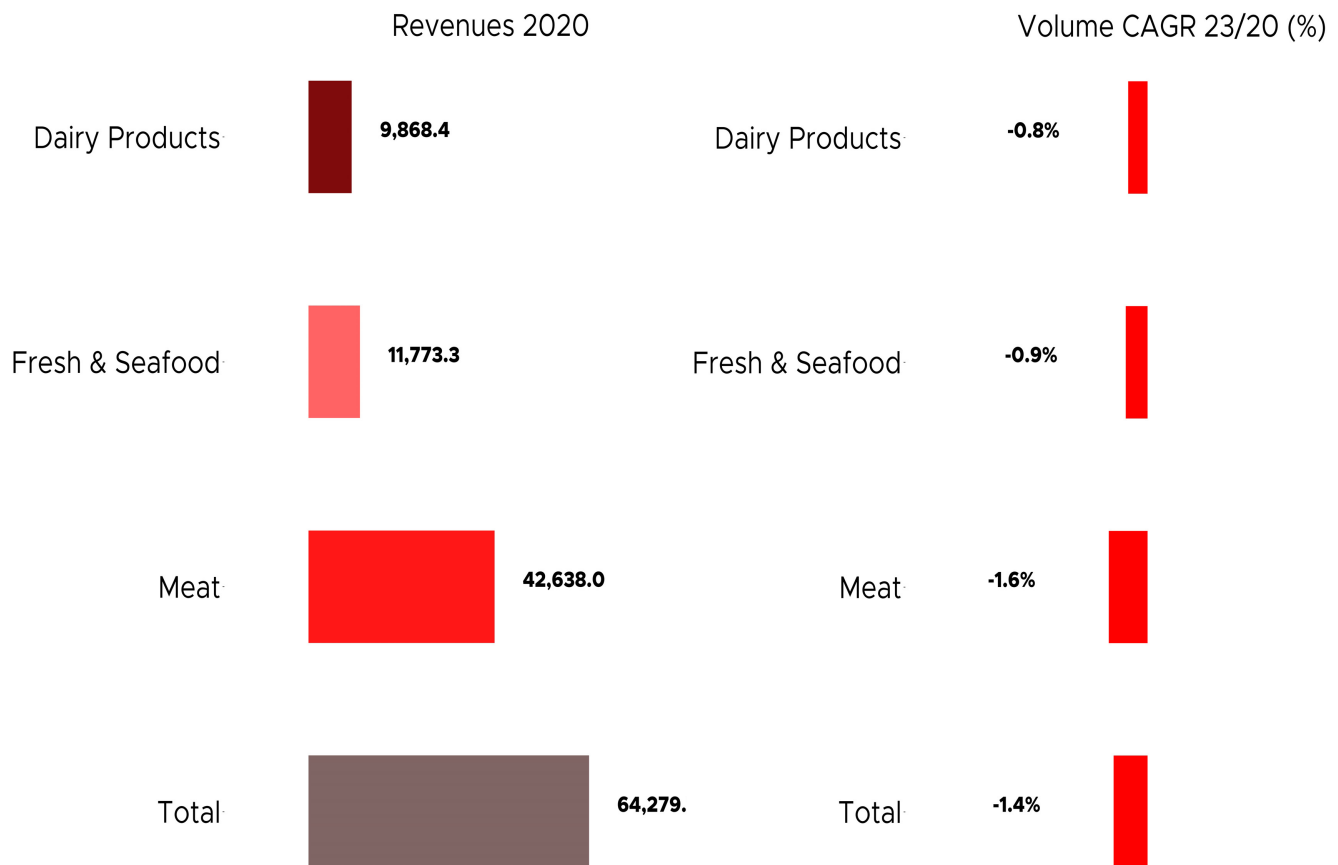


FRANCE



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	8,954.2	9,065.3	9,868.4	9,630.9	0.4%	-0.8%
Fresh & Seafood	10,271.3	10,566.7	11,773.3	11,461.7	0.9%	-0.9%
Meat	38,312.0	38,549.2	42,638.0	40,616.9	0.2%	-1.6%
Total	57,537.5	58,181.2	64,279.7	61,709.5	0.4%	-1.4%





FRANCE

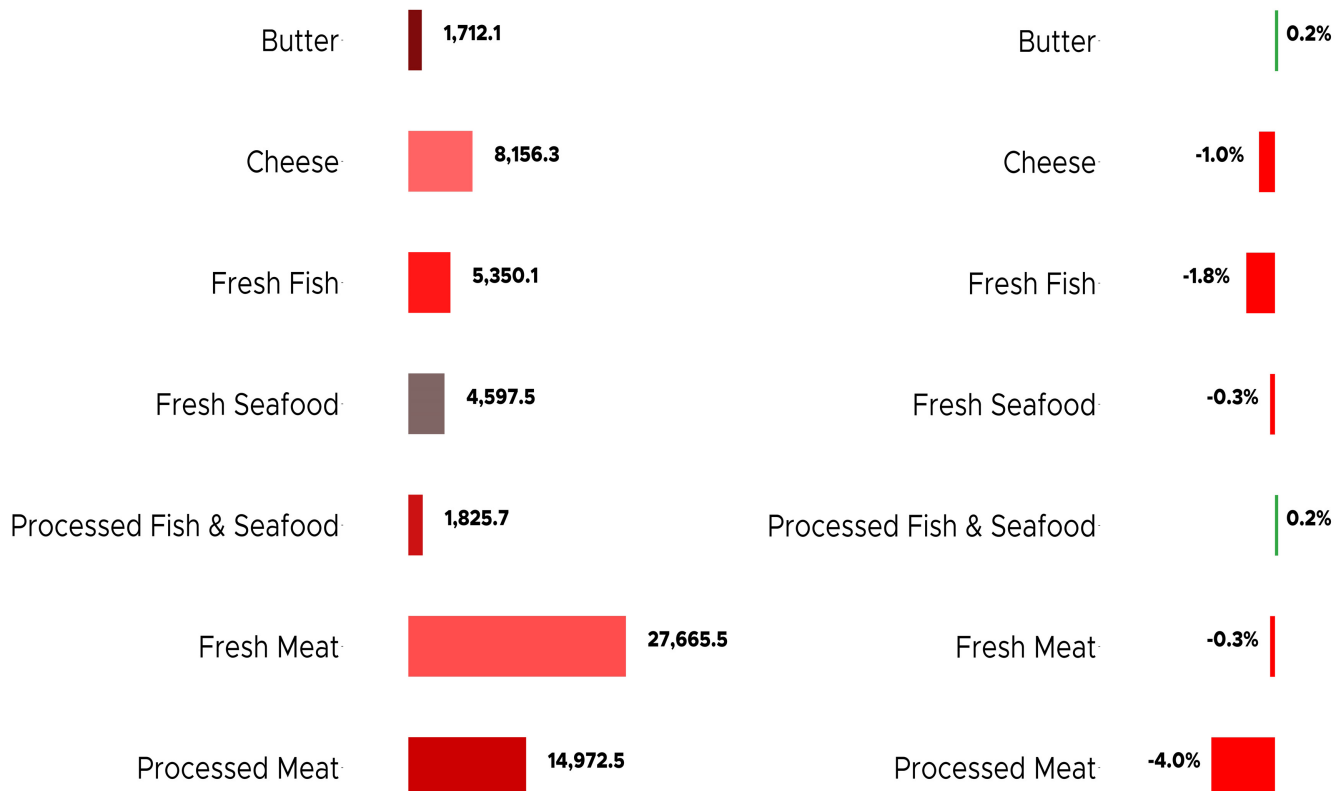


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	1,491.1	1,557.0	1,712.1	1,721.4	1.5%	0.2%
Cheese	7,463.1	7,508.3	8,156.3	7,909.5	0.2%	-1.0%
Fresh Fish	4,839.6	4,845.3	5,350.1	5,070.3	0.0%	-1.8%
Fresh Seafood	3,910.4	4,100.8	4,597.5	4,557.1	1.6%	-0.3%
Processed Fish & Seafood	1,521.3	1,620.6	1,825.7	1,834.4	2.1%	0.2%
Fresh Meat	23,573.1	24,689.1	27,665.5	27,376.3	1.6%	-0.3%
Processed Meat	14,739.0	13,860.1	14,972.5	13,240.6	-2.0%	-4.0%

Revenues 2020

Revenue CAGR 23/20 (%)



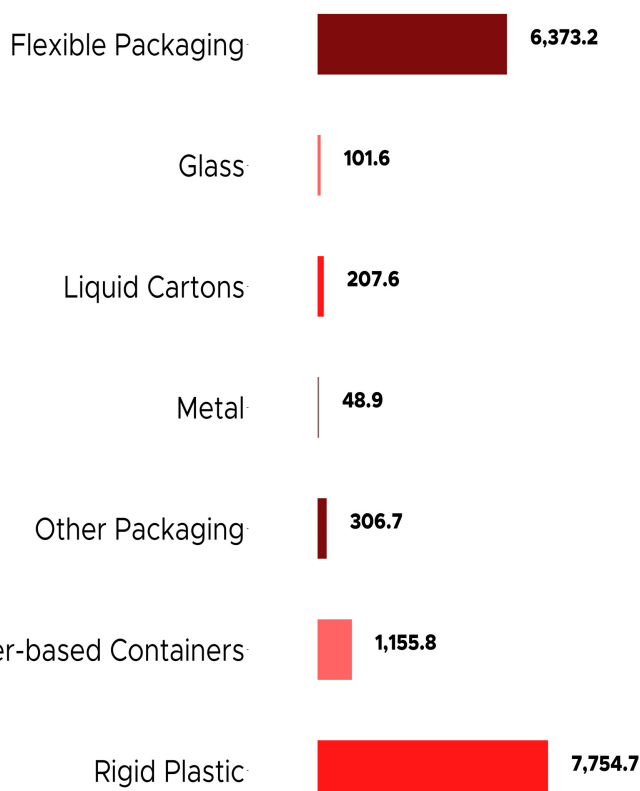


FRANCE

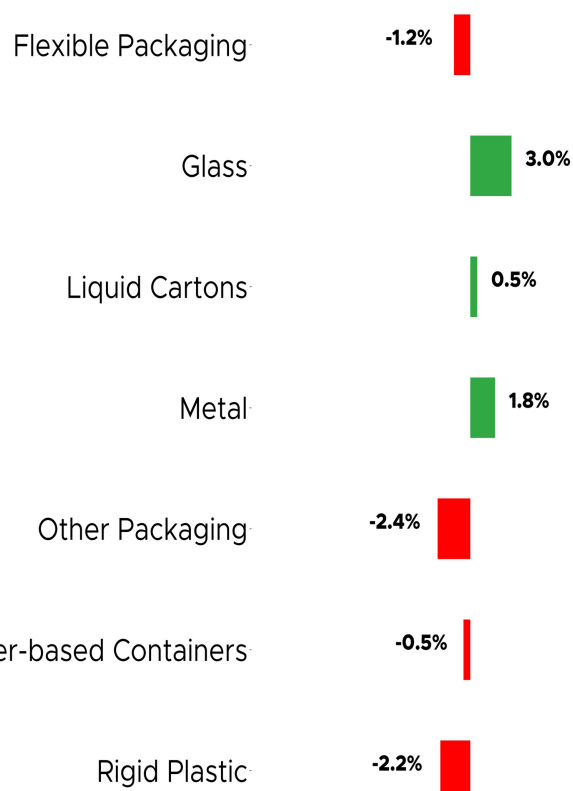
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	6,175.0	6,178.5	6,373.2	6,149.7	0.0%	-1.2%
Glass	78.9	95.1	101.6	111.1	6.4%	3.0%
Liquid Cartons	174.0	198.8	207.6	210.7	4.5%	0.5%
Metal	47.3	47.6	48.9	51.6	0.2%	1.8%
Other Packaging	343.6	303.9	306.7	284.9	-4.0%	-2.4%
Paper-based Containers	1,061.3	1,110.2	1,155.8	1,139.2	1.5%	-0.5%
Rigid Plastic	7,934.9	7,605.1	7,754.7	7,260.5	-1.4%	-2.2%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



GERMANY



Consumers
83,240,525

CAGR 15/20

+0.4%

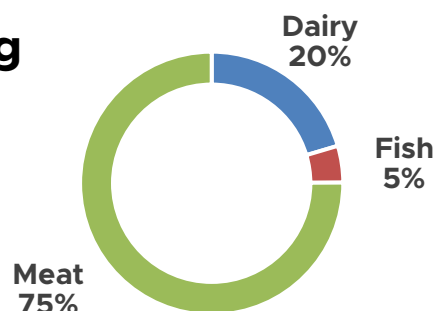
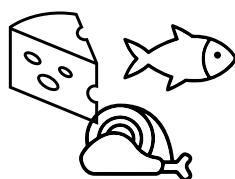


Gdp per capita
38.865 €

CAGR 15/20

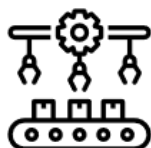
+2.2%

Fresh food processing



Most growing category 16/20

Dairy +28.19% per year



Food processing & packaging machinery market

1.408,3 mln €

Packaging type

Most consumed

Flexible
Packaging 44.0%



Most growing 20/23

Other Packaging
+3.3 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



GERMANY

Meat Processing

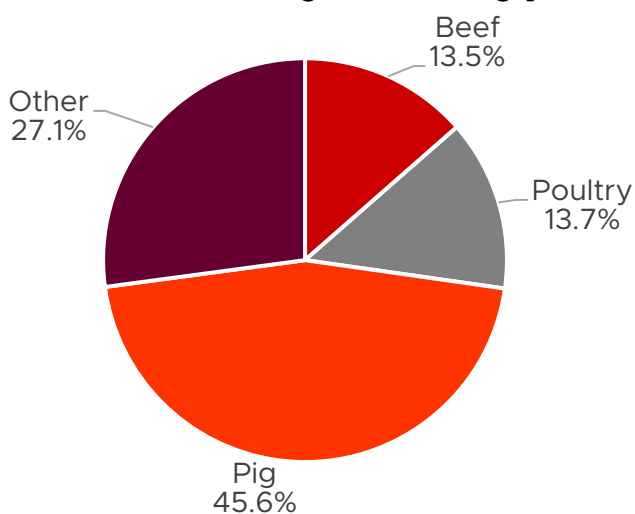
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	10,413.1	12,255.1	12,132.0	13,233.6	12,685.0	64%	5.06%
Processed+Sausage	3,582.0	3,574.3	3,605.5	3,613.4	3,371.3	17%	-1.50%
Frozen	910.7	1,268.0	1,349.7	1,263.9	1,274.1	6%	8.76%
Others	2,081.1	2,338.3	2,346.3	2,469.8	2,488.4	13%	4.57%
Total	16,986.8	19,435.7	19,433.4	20,580.7	19,818.7	100%	3.93%

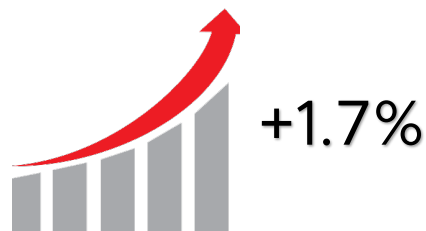
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	16,793.6	18,420.5	17,378.2	19,005.2	18,012.5	47%	1.77%
Processed+Sausage	15,164.3	15,498.3	15,498.7	16,280.5	16,069.7	42%	1.46%
Frozen	1,356.4	1,396.5	1,446.2	1,410.4	1,375.3	4%	0.35%
Others	2,181.4	2,521.4	2,293.9	2,782.9	2,533.1	7%	3.81%
Total	35,495.8	37,836.7	36,617.0	39,479.0	37,990.6	100%	1.71%

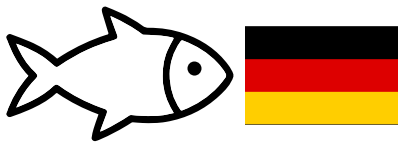
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



GERMANY

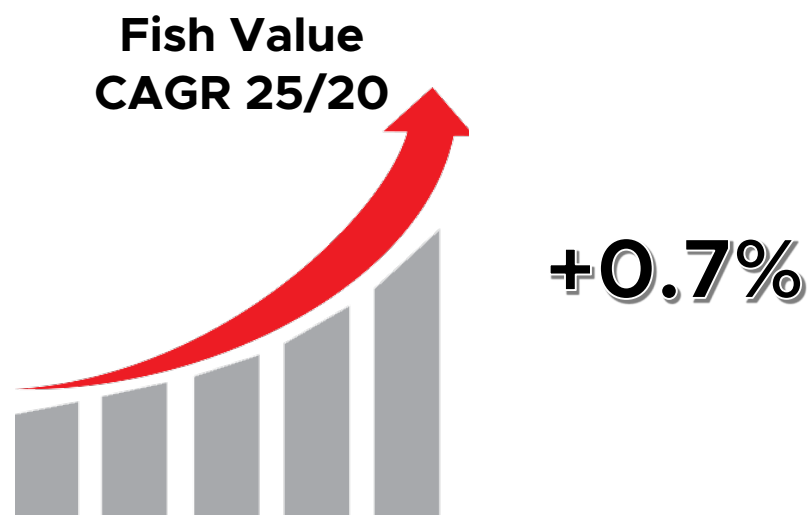
Fish Processing

Fish Volume by categories (mln Kg)

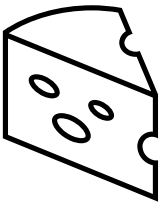
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	21.9	22.3	30.2	61.8	64.7	14%	31.1%
Frozen	41.7	33.1	29.2	32.3	26.9	6%	-10.3%
Processed	334.9	334.1	358.1	339.7	358.3	80%	1.7%
Total	398.4	389.5	417.5	433.8	449.9	100%	3.1%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	198.8	221.2	242.0	471.4	491.6	22%	25.4%
Frozen	164.9	139.3	125.3	166.1	135.0	6%	-4.9%
Processed	1,470.9	1,520.7	1,588.8	1,616.5	1,657.2	73%	3.0%
Total	1,834.6	1,881.2	1,956.1	2,254.0	2,283.8	100%	5.6%



Source: elaboration on data Eurostat



GERMANY

Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	1,065.2	1,068.7	1,116.7	2,820.6	2,899.2	85%	28.4%
Butter	528.5	505.4	484.1	490.8	503.8	15%	-1.2%
Total	1,593.6	1,574.1	1,600.8	3,311.4	3,403.0	100%	20.9%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	2,073.9	7,539.2	7,632.5	7,861.1	8,385.0	81%	41.8%
Butter	1,750.4	2,495.6	2,497.1	2,079.2	1,941.3	19%	2.6%
Total	3,824.3	10,034.8	10,129.6	9,940.2	10,326.2	100%	28.2%

Dairy Value CAGR 25/20



-0.1%

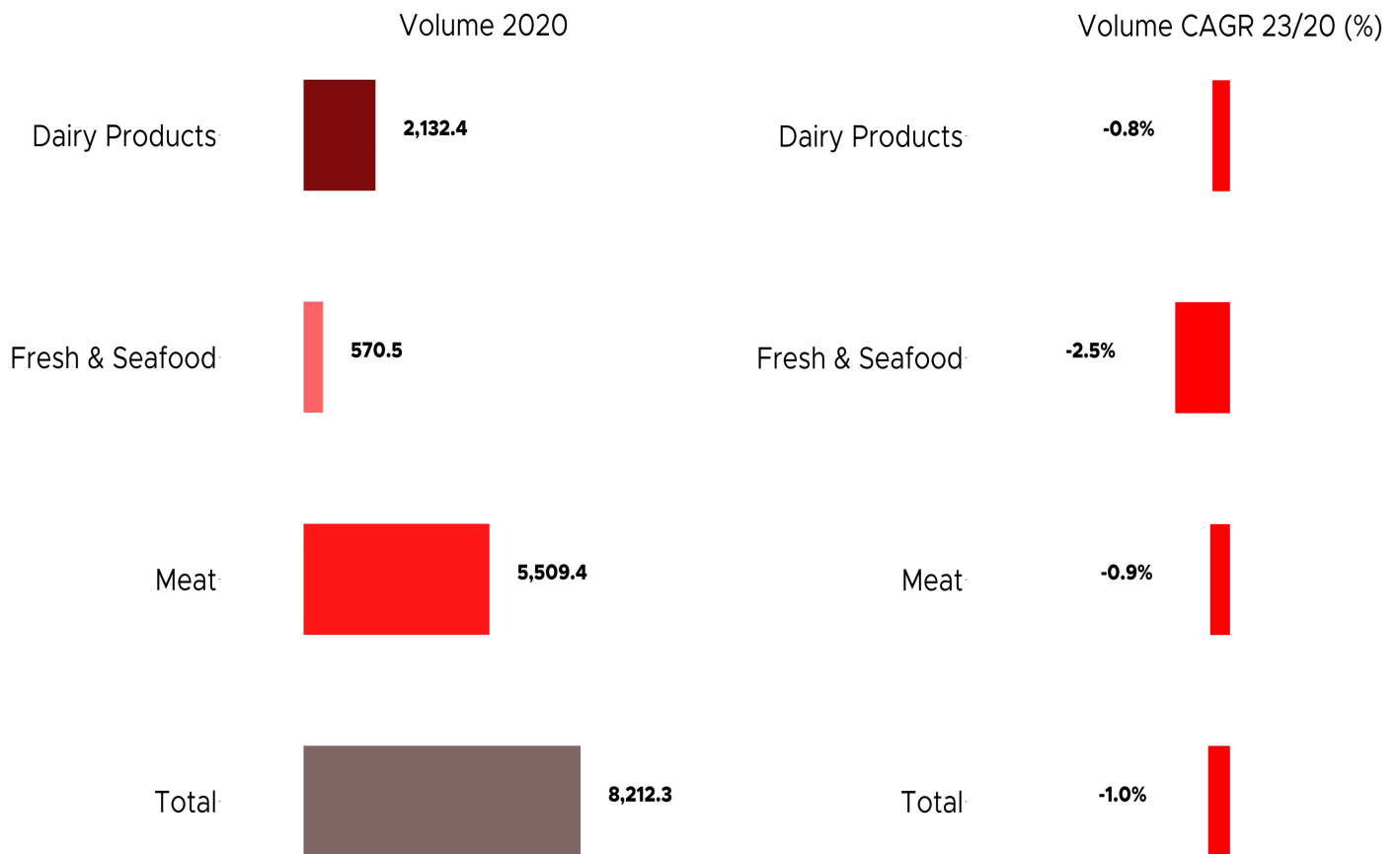
Source: elaboration on data Eurostat



GERMANY

Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	1,891.4	1,968.2	2,132.4	2,079.1	1.3%	-0.8%
Fresh & Seafood	553.8	524.3	570.5	528.2	-1.8%	-2.5%
Meat	4,793.4	4,987.1	5,509.4	5,362.2	1.3%	-0.9%
Total	7,238.6	7,479.6	8,212.3	7,969.5	1.1%	-1.0%

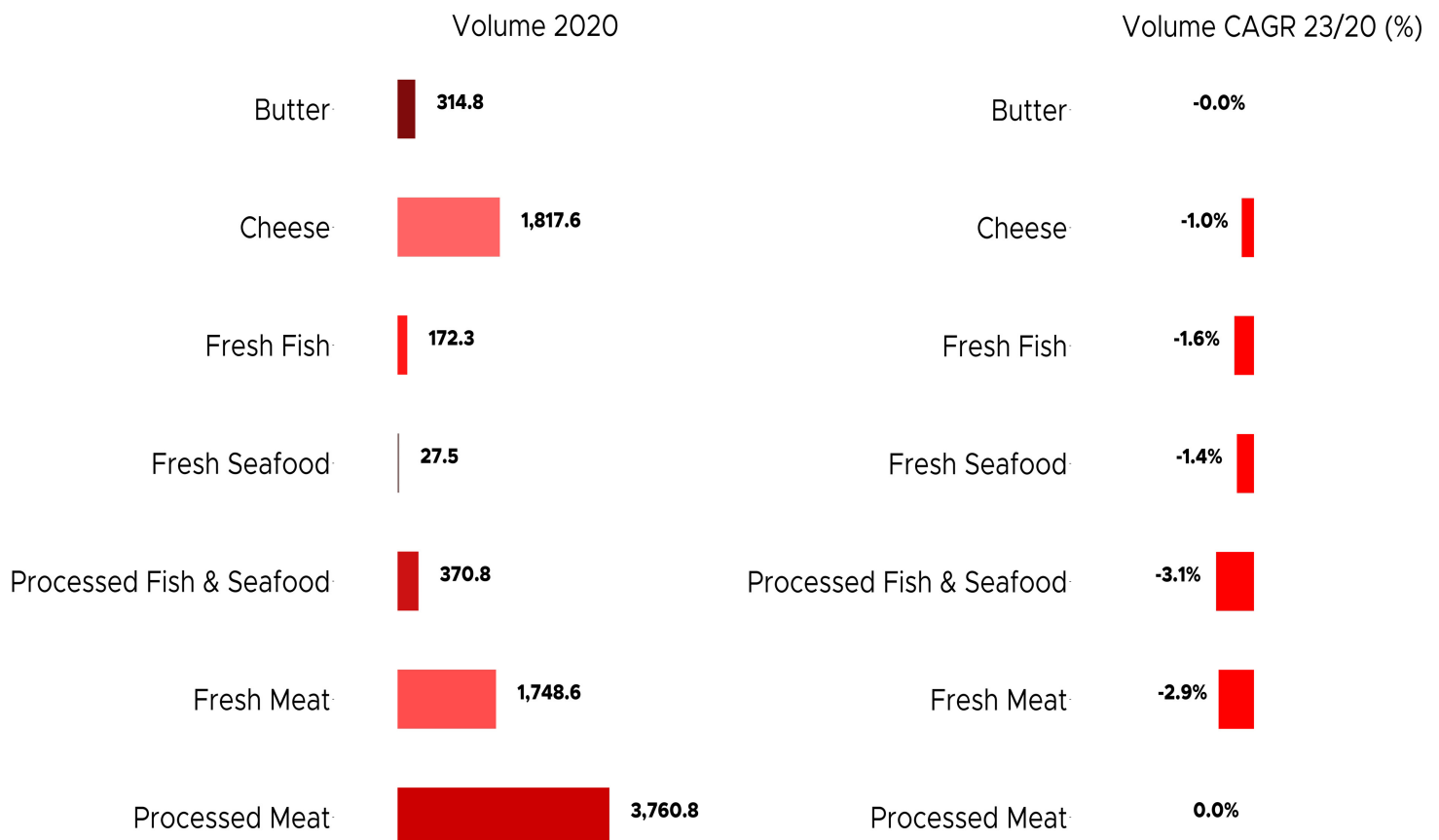




GERMANY

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	272.9	287.4	314.8	314.6	1.7%	-0.0%
Cheese	1,618.5	1,680.9	1,817.6	1,764.5	1.3%	-1.0%
Fresh Fish	160.6	156.5	172.3	164.0	-0.9%	-1.6%
Fresh Seafood	25.4	24.9	27.5	26.4	-0.6%	-1.4%
Processed Fish & Seafood	367.8	342.9	370.8	337.8	-2.3%	-3.1%
Fresh Meat	1,630.7	1,616.3	1,748.6	1,601.0	-0.3%	-2.9%
Processed Meat	3,162.7	3,370.8	3,760.8	3,761.3	2.1%	0.0%





GERMANY

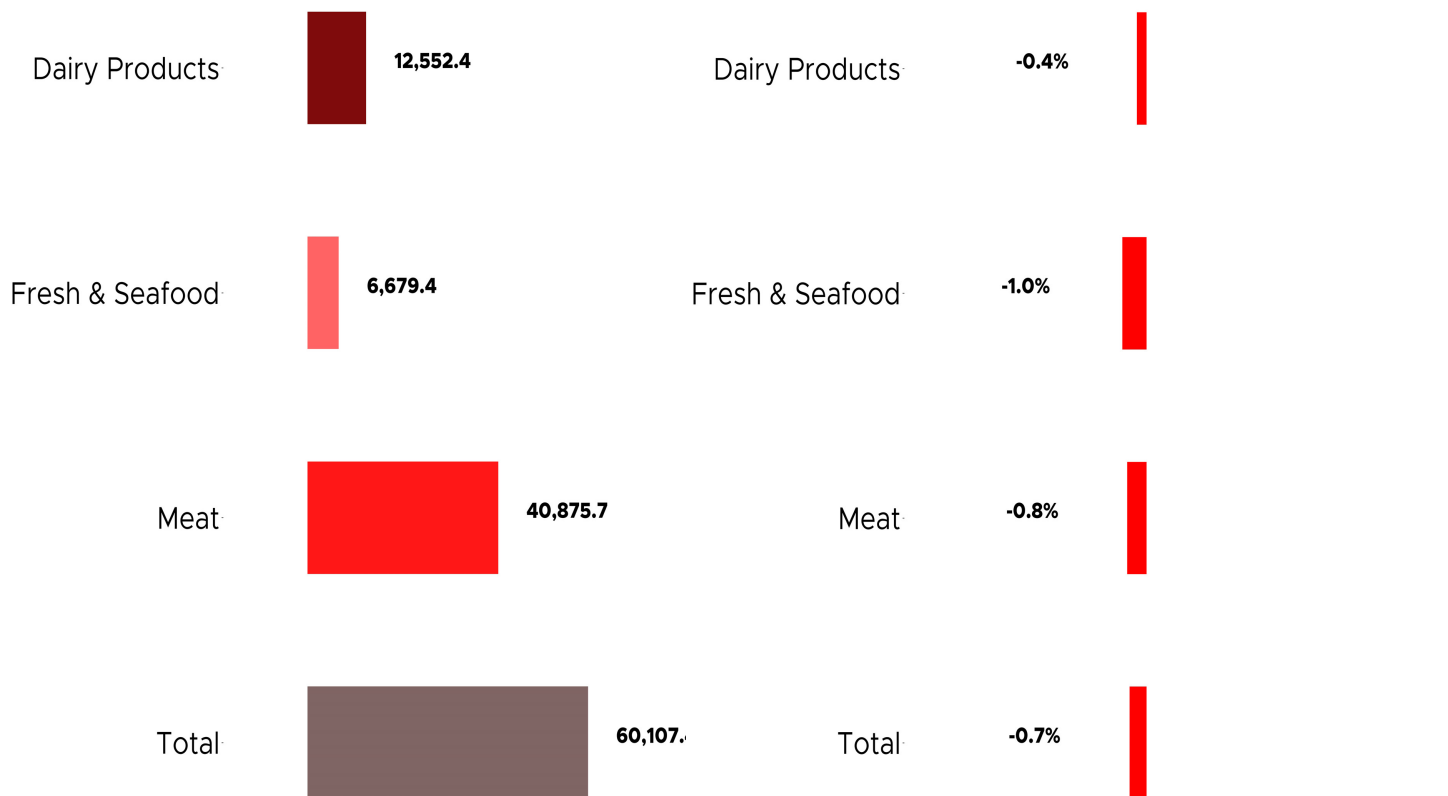


Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	10,993.9	11,498.3	12,552.4	12,415.6	1.5%	-0.4%
Fresh & Seafood	5,804.7	6,041.5	6,679.4	6,480.9	1.3%	-1.0%
Meat	35,204.2	36,890.1	40,875.7	39,935.0	1.6%	-0.8%
Total	52,002.8	54,429.8	60,107.4	58,831.6	1.5%	-0.7%

Revenues 2020

Volume CAGR 23/20 (%)





GERMANY

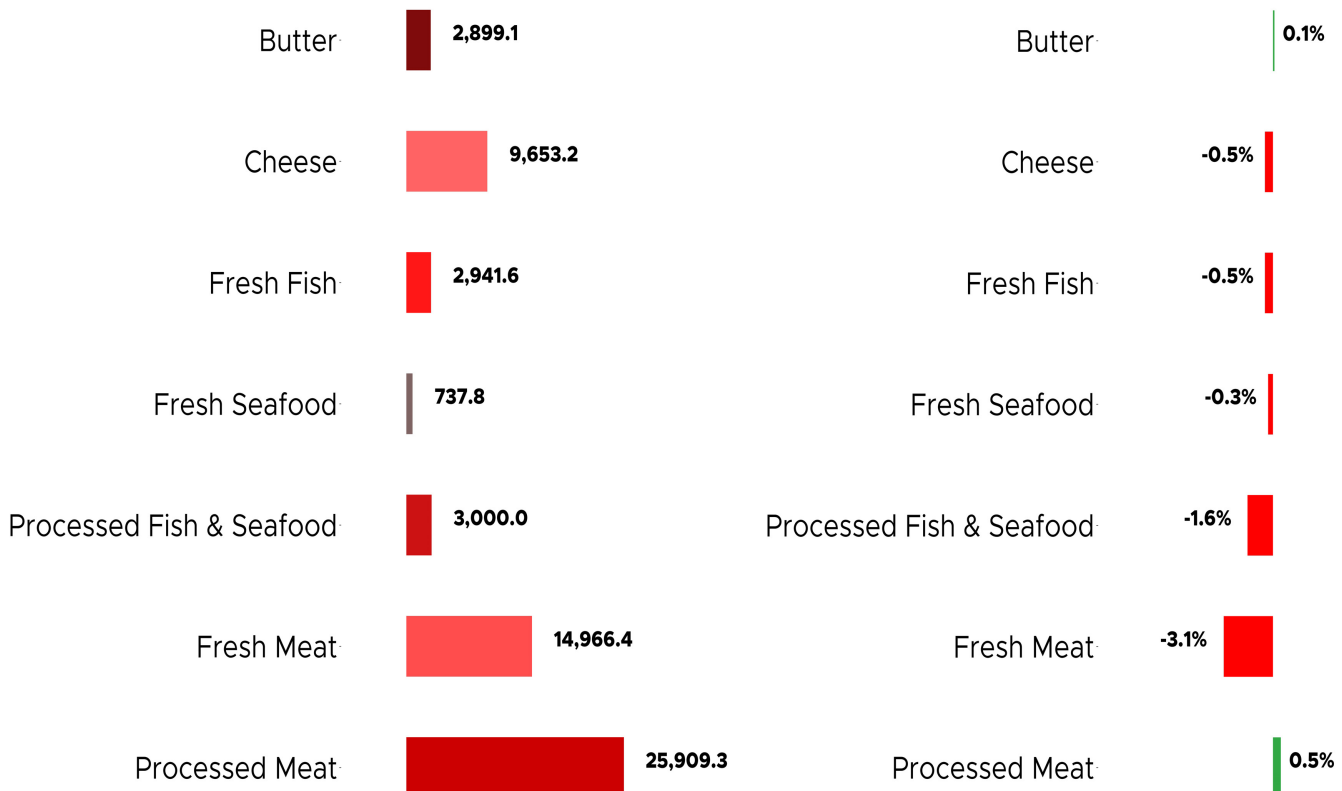


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	2,493.2	2,643.6	2,899.1	2,906.6	2.0%	0.1%
Cheese	8,500.7	8,854.7	9,653.2	9,509.0	1.4%	-0.5%
Fresh Fish	2,508.6	2,648.1	2,941.6	2,895.0	1.8%	-0.5%
Fresh Seafood	622.7	662.6	737.8	730.9	2.1%	-0.3%
Processed Fish & Seafood	2,673.5	2,730.8	3,000.0	2,855.0	0.7%	-1.6%
Fresh Meat	14,051.8	13,810.9	14,966.4	13,631.5	-0.6%	-3.1%
Processed Meat	21,152.4	23,079.1	25,909.3	26,303.5	2.9%	0.5%

Revenues 2020

Revenue CAGR 23/20 (%)



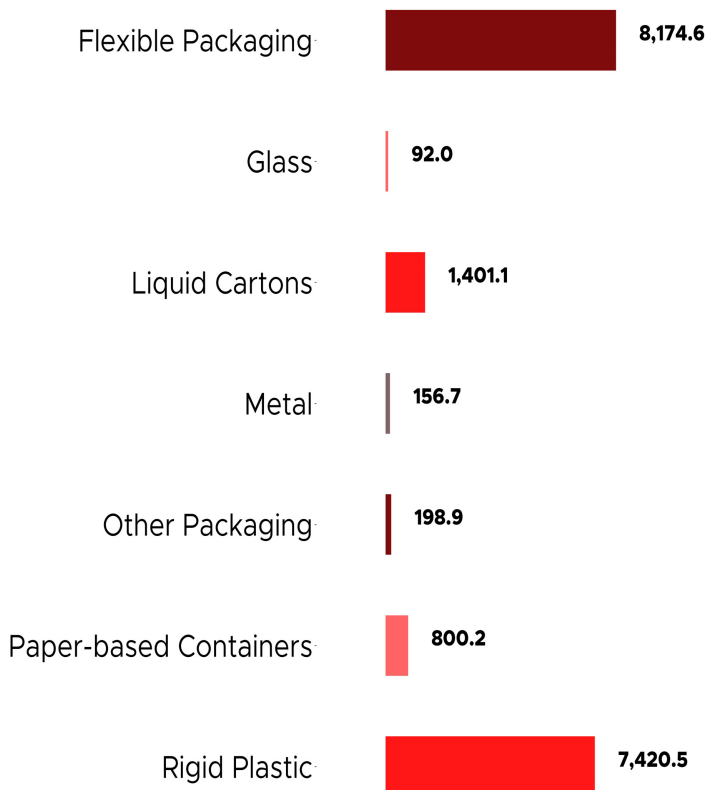


GERMANY

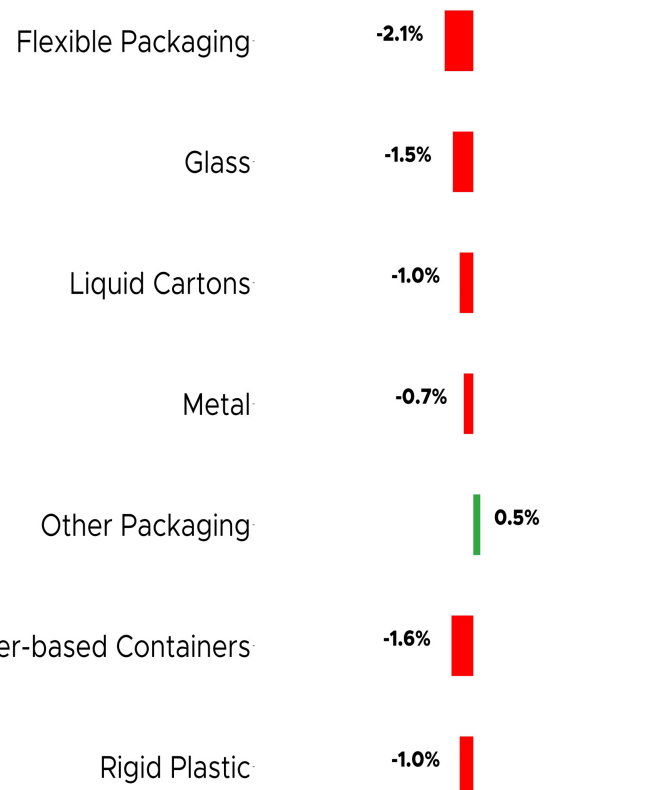
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	8,453.2	7,915.8	8,174.6	7,665.8	-2.2%	-2.1%
Glass	91.7	89.9	92.0	87.8	-0.7%	-1.5%
Liquid Cartons	1,360.5	1,346.1	1,401.1	1,358.0	-0.4%	-1.0%
Metal	149.9	150.0	156.7	153.5	0.0%	-0.7%
Other Packaging	193.9	193.2	198.9	202.2	-0.1%	0.5%
Paper-based Containers	776.7	771.5	800.2	763.5	-0.2%	-1.6%
Rigid Plastic	7,585.6	7,222.8	7,420.5	7,197.1	-1.6%	-1.0%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



GREAT BRITAIN



Consumers
67,215,293

CAGR 15/20

+0.6%

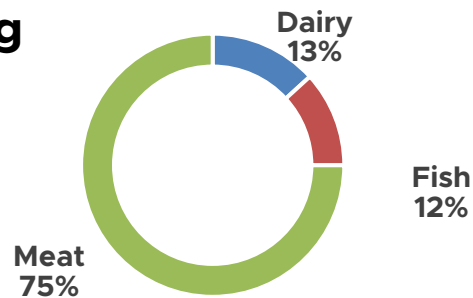
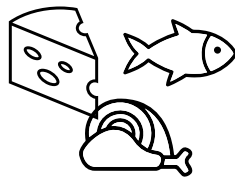


Gdp per capita
34.242 €

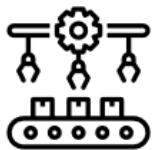
CAGR 15/20

-2.2%

Fresh food processing



Most growing category 16/20
Dairy +6.11% per year



Food processing & packaging machinery market
575,2 mln €

Packaging type

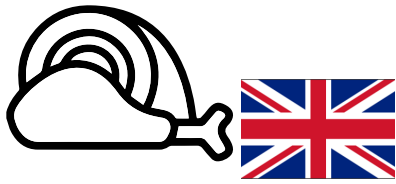
Most consumed
Rigid Plastic
55.0%



Most growing 20/23
Rigid Plastic
+64.9 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



GREAT BRITAIN

Meat Processing



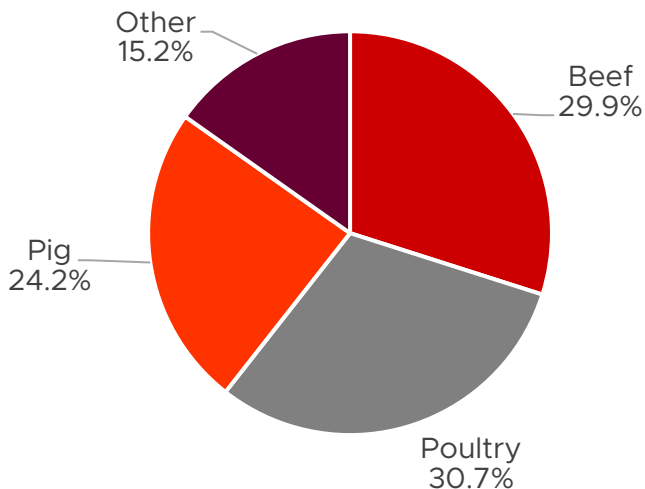
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	3,073.9	3,214.6	3,225.0	3,180.0	3,180.0	50%	0.85%
Processed+Sausage	1,401.7	1,460.0	1,424.3	1,427.8	1,427.8	22%	0.46%
Frozen	362.8	429.5	402.1	449.5	449.5	7%	5.50%
Others	998.1	1,254.1	1,340.6	1,297.5	1,297.5	20%	6.78%
Total	5,836.5	6,358.2	6,392.0	6,354.7	6,354.7	100%	2.15%

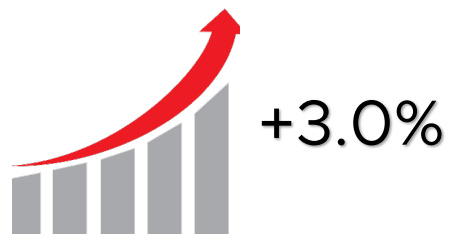
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	11,732.5	12,057.2	12,741.4	13,066.3	13,066.3	62%	2.73%
Processed+Sausage	6,248.3	6,116.5	6,233.9	6,330.1	6,330.1	30%	0.33%
Frozen	663.8	825.0	762.7	910.1	910.1	4%	8.21%
Others	536.9	629.6	663.1	672.3	672.3	3%	5.78%
Total	19,181.5	19,628.3	20,401.2	20,978.7	20,978.7	100%	2.26%

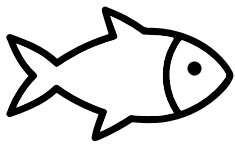
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



GREAT BRITAIN

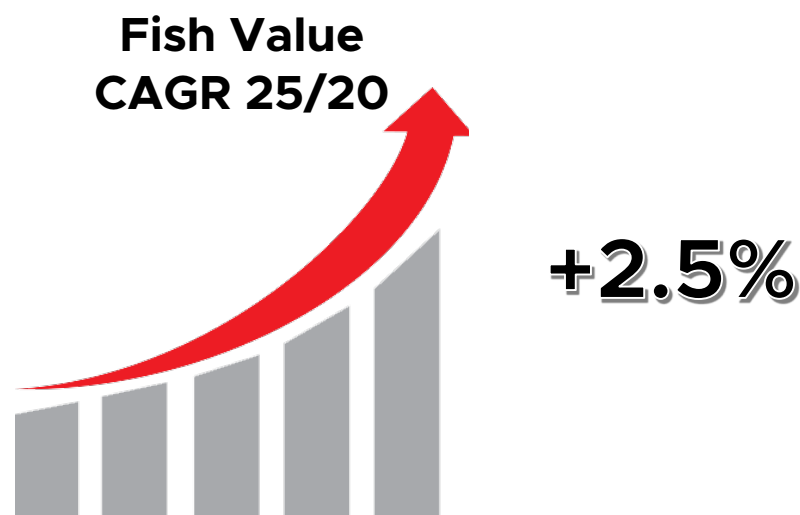
Fish Processing

Fish Volume by categories (mln Kg)

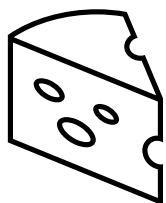
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	51.8	52.7	54.1	94.8	94.8	20%	16.3%
Frozen	155.2	177.2	131.2	116.4	116.4	25%	-6.9%
Processed	259.8	258.9	259.6	263.8	263.8	56%	0.4%
Total	466.7	488.9	444.9	475.0	475.0	100%	0.4%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	623.6	633.2	656.2	1,182.6	1,182.6	36%	17.3%
Frozen	285.7	276.8	283.7	273.3	273.3	8%	-1.1%
Processed	1,736.8	1,822.4	1,882.1	1,836.9	1,836.9	56%	1.4%
Total	2,646.0	2,732.4	2,822.0	3,292.8	3,292.8	100%	5.6%



Source: elaboration on data Eurostat



GREAT BRITAIN

Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	548.8	804.1	776.3	749.8	749.8	74%	8.1%
Butter	217.0	239.8	260.8	268.7	268.7	26%	5.5%
Total	765.9	1,043.9	1,037.1	1,018.5	1,018.5	100%	7.4%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	2,257.6	2,329.6	2,443.0	2,734.2	2,734.2	74%	4.9%
Butter	661.9	802.5	887.9	967.5	967.5	26%	10.0%
Total	2,919.5	3,132.2	3,330.9	3,701.7	3,701.7	100%	6.1%

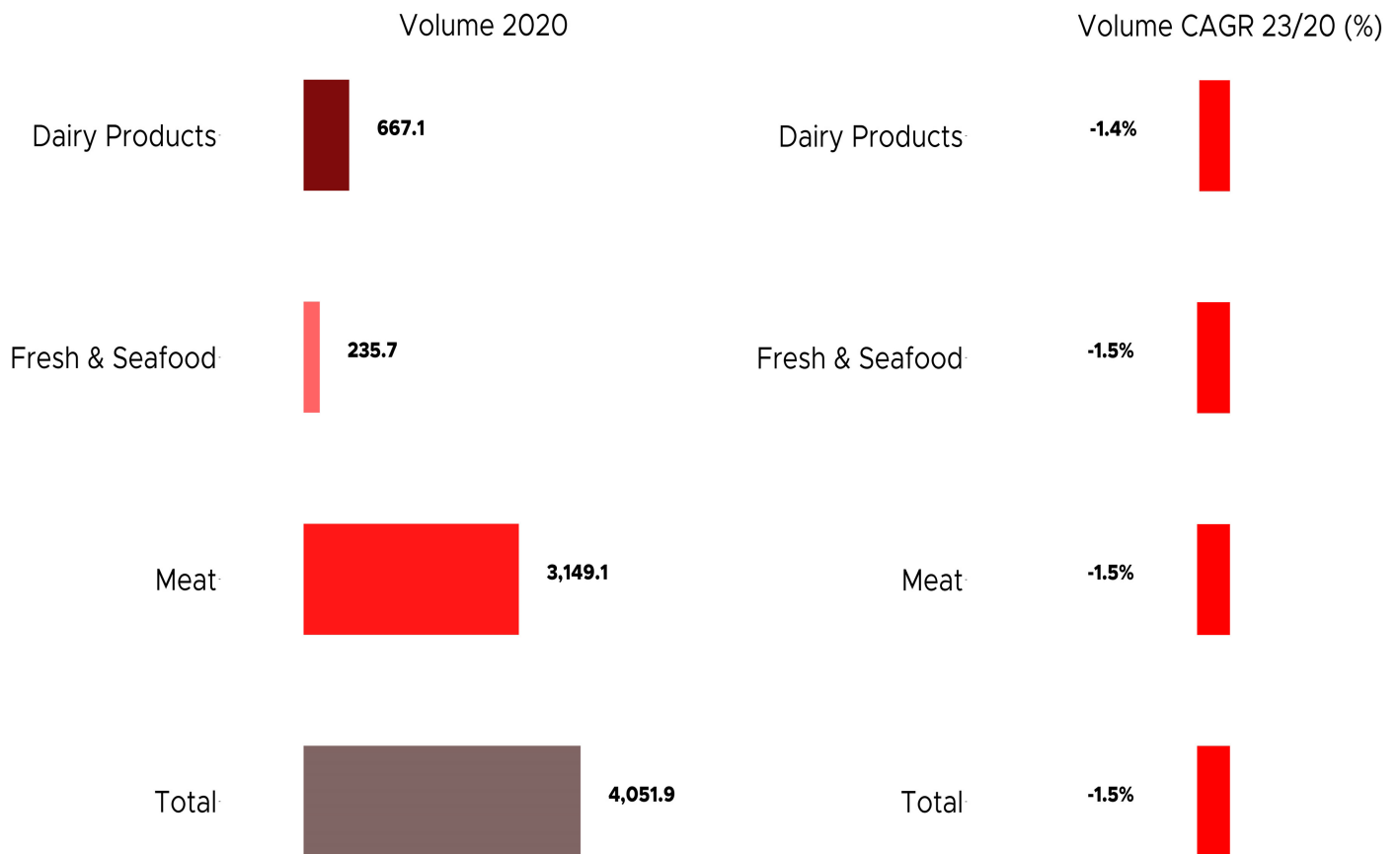
Source: elaboration on data Eurostat



GREAT BRITAIN

Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	617.8	610.7	667.1	639.5	-0.4%	-1.4%
Fresh & Seafood	208.6	210.3	235.7	225.3	0.3%	-1.5%
Meat	2,768.3	2,812.5	3,149.1	3,010.3	0.5%	-1.5%
Total	3,594.7	3,633.5	4,051.9	3,875.2	0.4%	-1.5%

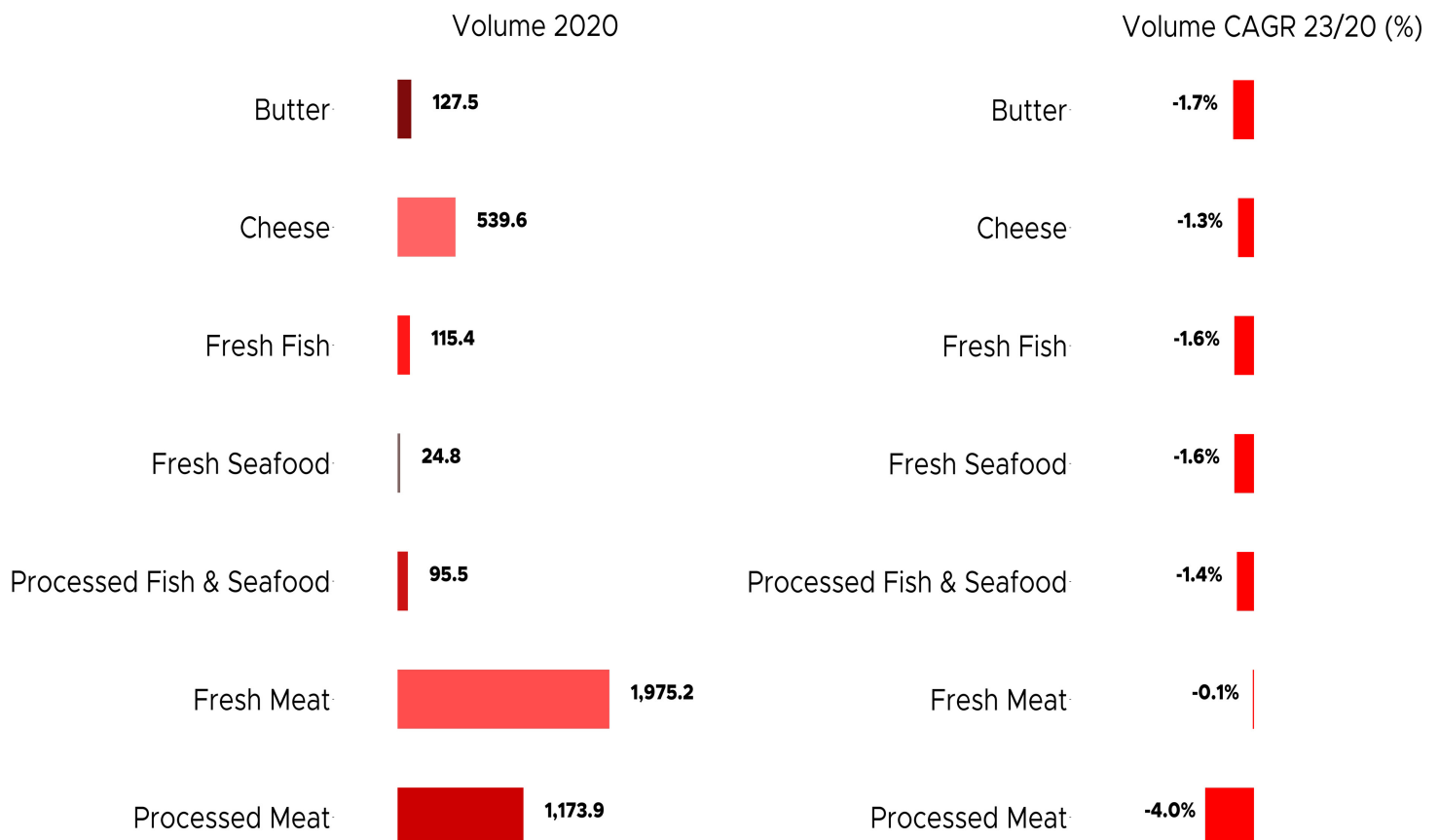




GREAT BRITAIN

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	120.6	116.5	127.5	121.3	-1.1%	-1.7%
Cheese	497.2	494.2	539.6	518.2	-0.2%	-1.3%
Fresh Fish	103.3	102.8	115.4	110.1	-0.1%	-1.6%
Fresh Seafood	22.2	22.1	24.8	23.7	-0.2%	-1.6%
Processed Fish & Seafood	83.1	85.3	95.5	91.6	0.9%	-1.4%
Fresh Meat	1,647.4	1,736.8	1,975.2	1,971.5	1.8%	-0.1%
Processed Meat	1,120.9	1,075.7	1,173.9	1,038.9	-1.4%	-4.0%



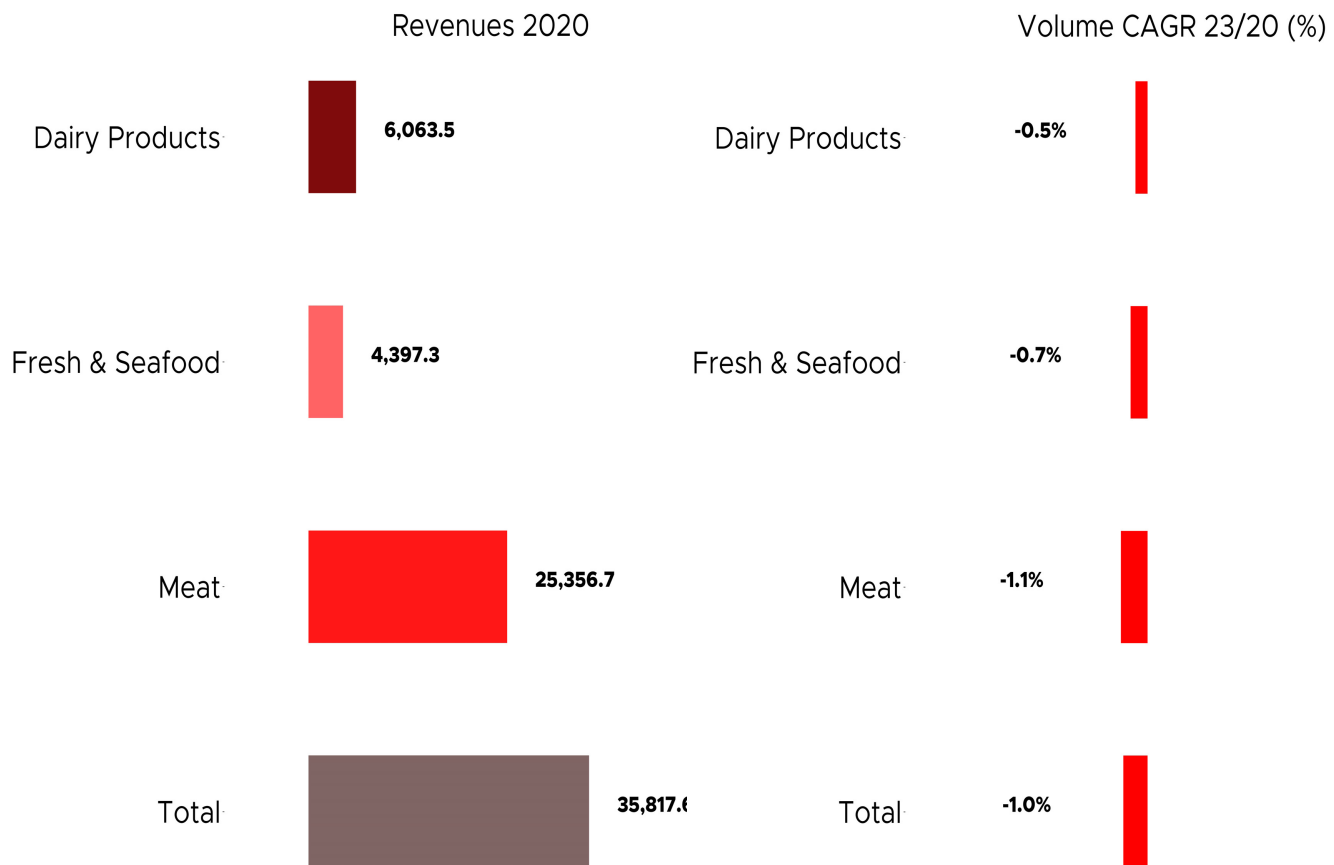


GREAT BRITAIN



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	5,261.8	5,495.6	6,063.5	5,981.5	1.5%	-0.5%
Fresh & Seafood	3,676.6	3,890.3	4,397.3	4,308.4	1.9%	-0.7%
Meat	21,598.1	22,546.9	25,356.7	24,500.6	1.4%	-1.1%
Total	30,536.5	31,932.9	35,817.6	34,790.5	1.5%	-1.0%





GREAT BRITAIN

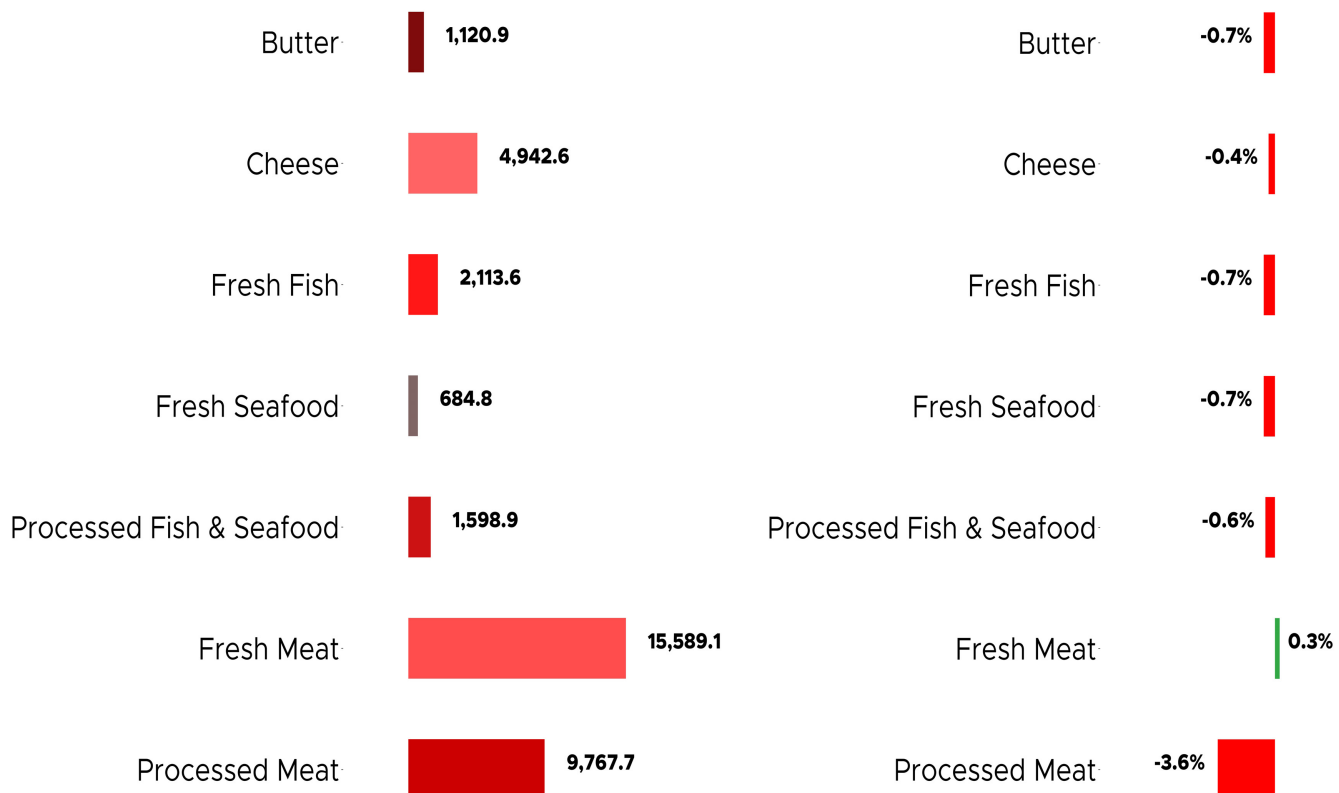


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	981.5	1,018.3	1,120.9	1,098.1	1.2%	-0.7%
Cheese	4,280.3	4,477.4	4,942.6	4,883.4	1.5%	-0.4%
Fresh Fish	1,769.7	1,870.5	2,113.6	2,068.5	1.9%	-0.7%
Fresh Seafood	574.0	606.2	684.8	669.7	1.8%	-0.7%
Processed Fish & Seafood	1,332.8	1,413.5	1,598.9	1,570.2	2.0%	-0.6%
Fresh Meat	12,480.0	13,647.5	15,589.1	15,742.2	3.0%	0.3%
Processed Meat	9,118.1	8,899.4	9,767.7	8,758.4	-0.8%	-3.6%

Revenues 2020

Revenue CAGR 23/20 (%)



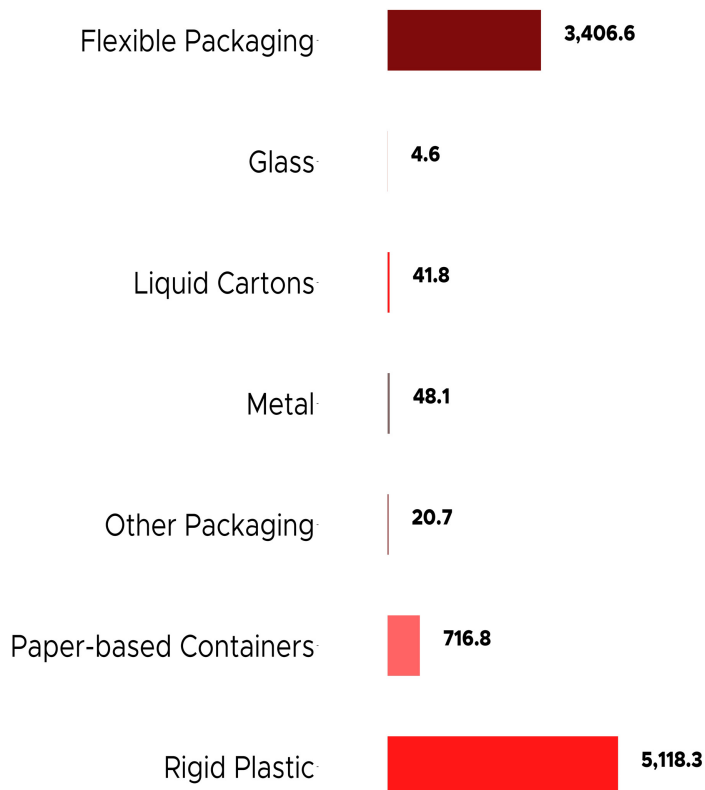


GREAT BRITAIN

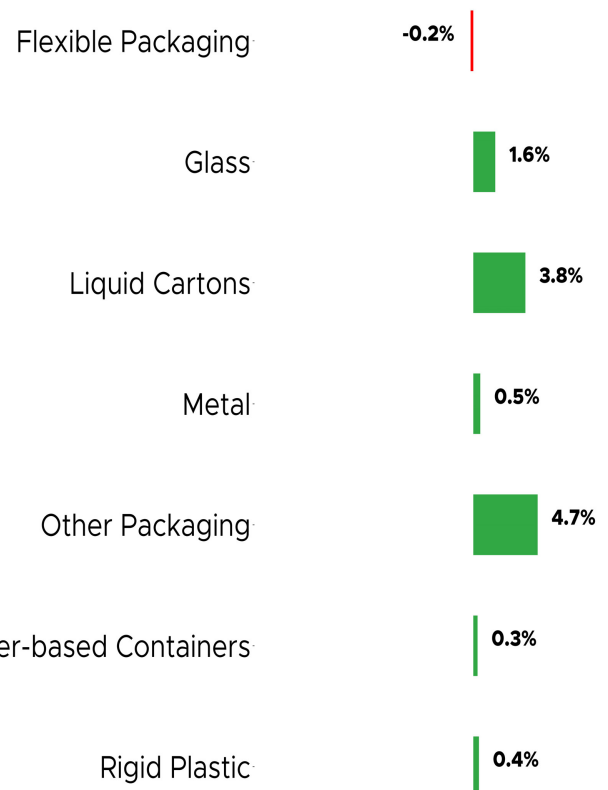
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	3,116.7	3,208.9	3,406.6	3,386.7	1.0%	-0.2%
Glass	4.4	4.5	4.6	4.8	0.9%	1.6%
Liquid Cartons	32.9	36.2	41.8	46.8	3.3%	3.8%
Metal	43.9	45.7	48.1	48.8	1.3%	0.5%
Other Packaging	16.7	19.4	20.7	23.8	5.0%	4.7%
Paper-based Containers	640.1	660.9	716.8	723.4	1.1%	0.3%
Rigid Plastic	4,763.6	4,833.1	5,118.3	5,183.2	0.5%	0.4%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



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Consumers

9,749,763

CAGR 15/20

-0.2%



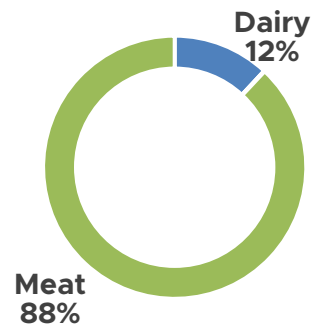
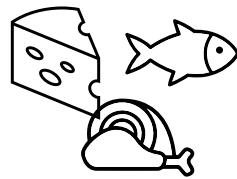
Gdp per capita

13.514 €

CAGR 15/20

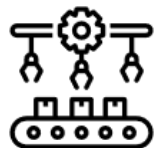
+4.6%

Fresh food processing



Most growing category 16/20

Fish +35.05% per year



Food processing & packaging machinery market

106,5 mln €

Packaging type

Most consumed

Rigid Plastic
46.6%



Most growing 20/23

Rigid Plastic
+27.0 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



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Meat Processing

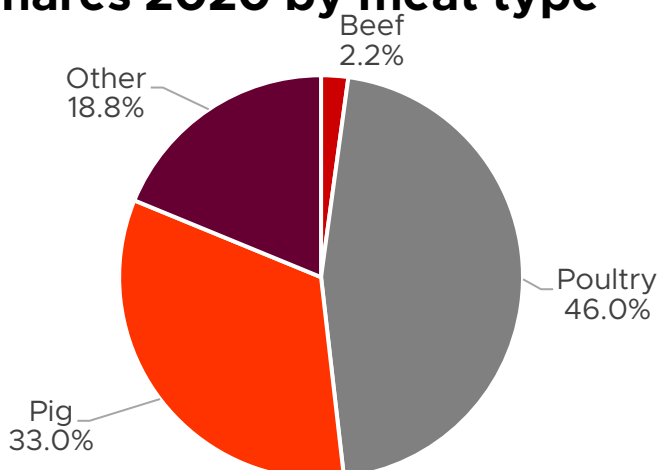
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	693.9	750.6	725.7	757.8	695.1	57%	0.04%
Processed+Sausage	233.7	245.2	232.6	252.0	206.0	17%	-3.10%
Frozen	150.8	141.2	163.8	156.7	149.0	12%	-0.30%
Others	180.2	227.9	238.2	257.1	170.8	14%	-1.33%
Total	1,258.5	1,364.8	1,360.3	1,423.6	1,220.9	100%	-0.76%

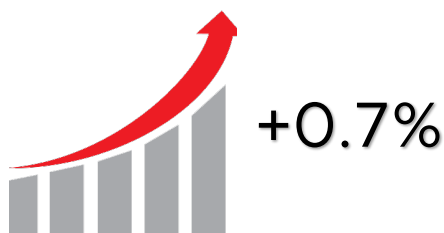
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	1,432.0	1,554.7	1,527.9	1,675.9	1,404.3	55%	-0.49%
Processed+Sausage	689.0	759.7	742.0	806.9	685.2	27%	-0.14%
Frozen	271.6	264.6	289.8	268.7	239.4	9%	-3.11%
Others	184.6	269.5	308.1	270.6	201.6	8%	2.23%
Total	2,577.2	2,848.5	2,867.8	3,022.1	2,530.4	100%	-0.46%

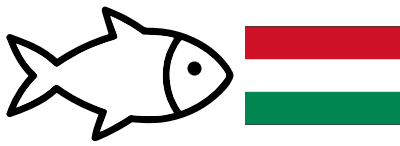
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



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Fish Processing

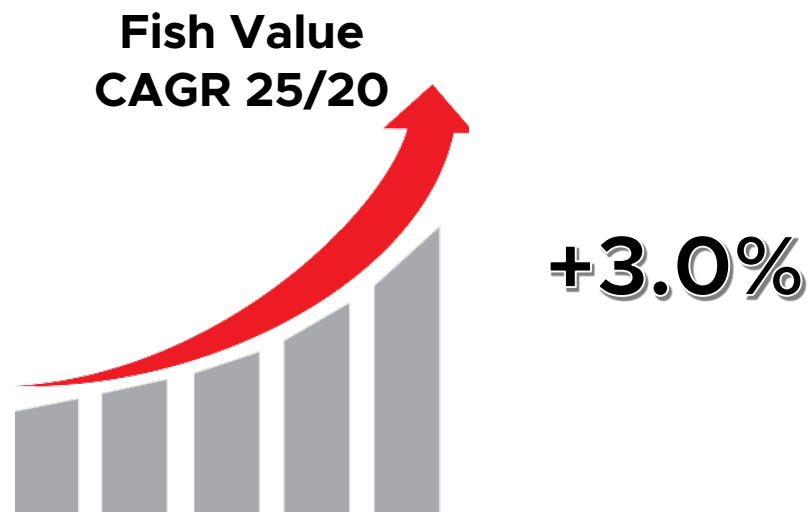


Fish Volume by categories (mln Kg)

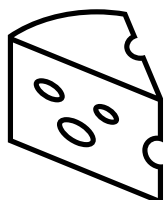
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	0.0	0.0	0.2	0.2	52%	152.8%
Frozen	0.1	0.1	0.0	0.1	0.1	13%	-7.9%
Processed	0.0	0.0	0.0	0.2	0.2	35%	41.2%
Total	0.1	0.1	0.0	0.5	0.5	100%	38.0%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	0.0	0.0	1.0	1.0	48%	149.1%
Frozen	0.3	0.2	0.0	0.2	0.2	9%	-8.6%
Processed	0.3	0.3	0.1	0.9	0.9	43%	28.6%
Total	0.6	0.6	0.1	2.0	2.0	100%	35.1%



Source: elaboration on data Eurostat



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Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	99.4	107.4	108.7	106.1	90.4	90%	-2.4%
Butter	10.1	9.9	9.8	9.0	9.6	10%	-1.5%
Total	109.6	117.2	118.5	115.2	99.9	100%	-2.3%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	322.0	372.3	377.1	380.9	306.5	89%	-1.2%
Butter	30.2	37.2	38.4	36.9	36.1	11%	4.5%
Total	352.3	409.5	415.6	417.8	342.6	100%	-0.7%

Dairy Value CAGR 25/20



-0.7%

Source: elaboration on data Eurostat

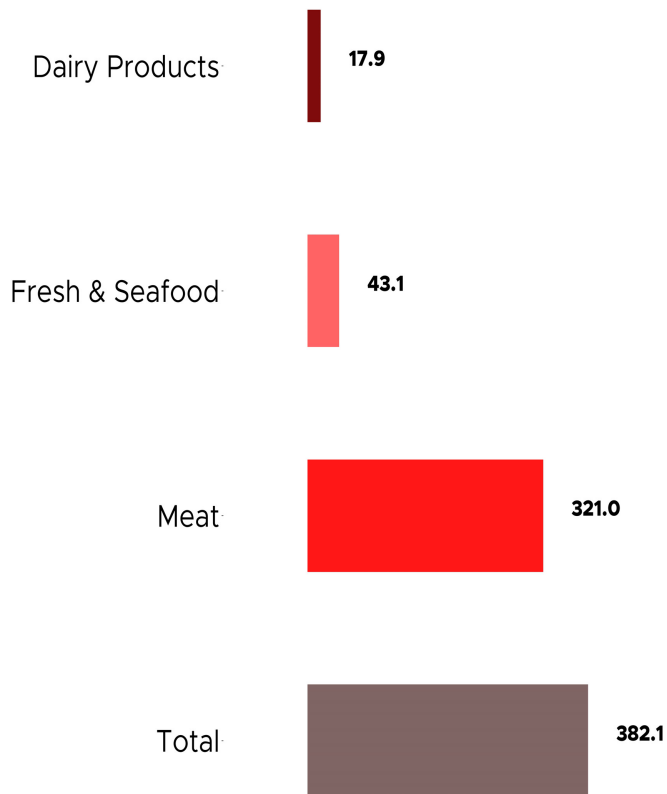


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Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	18.8	16.4	17.9	16.9	-4.4%	-1.9%
Fresh & Seafood	43.1	38.0	43.1	41.6	-4.2%	-1.1%
Meat	286.4	280.6	321.0	321.5	-0.7%	0.1%
Total	348.3	335.0	382.1	380.1	-1.3%	-0.2%

Volume 2020



Volume CAGR 23/20 (%)





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Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	4.2	3.6	4.0	3.9	-4.8%	-1.0%
Cheese	14.6	12.8	13.9	13.0	-4.3%	-2.2%
Fresh Fish	26.5	22.7	25.6	24.1	-5.0%	-1.9%
Fresh Seafood	4.3	3.8	4.4	4.3	-3.7%	-0.6%
Processed Fish & Seafood	12.3	11.4	13.1	13.2	-2.5%	0.2%
Fresh Meat	221.1	224.7	259.1	265.2	0.5%	0.8%
Processed Meat	65.3	55.8	62.0	56.3	-5.1%	-3.1%





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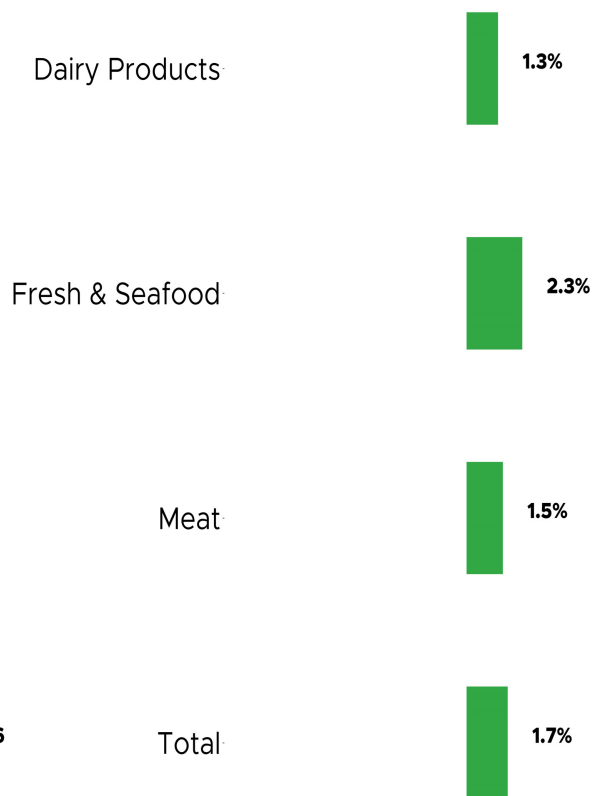
Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	149.8	157.5	177.9	184.8	1.7%	1.3%
Fresh & Seafood	555.6	616.0	723.7	774.4	3.5%	2.3%
Meat	1,528.1	1,653.1	1,927.0	2,016.1	2.7%	1.5%
Total	2,233.5	2,426.6	2,828.6	2,975.3	2.8%	1.7%

Revenues 2020



Volume CAGR 23/20 (%)





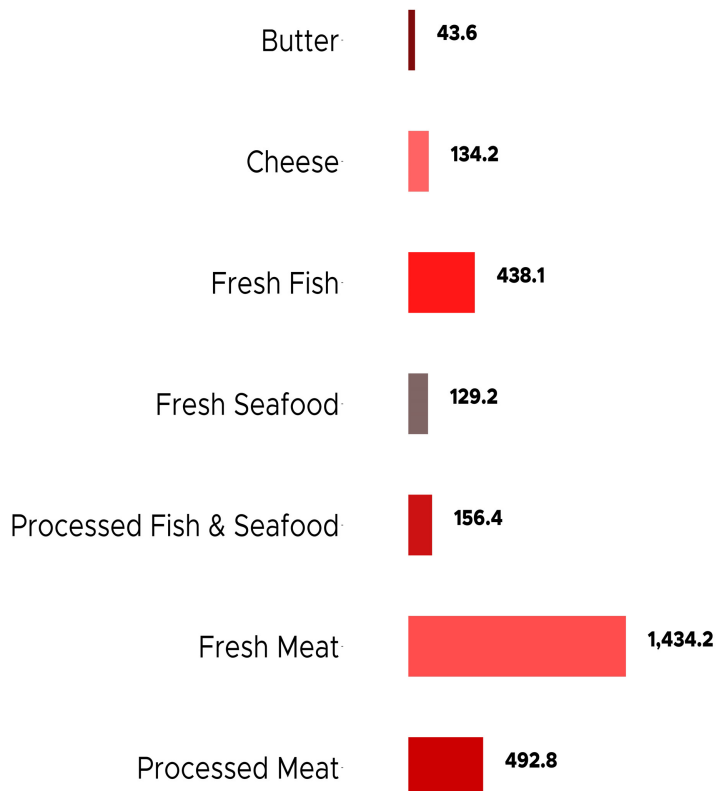
HUNGARY



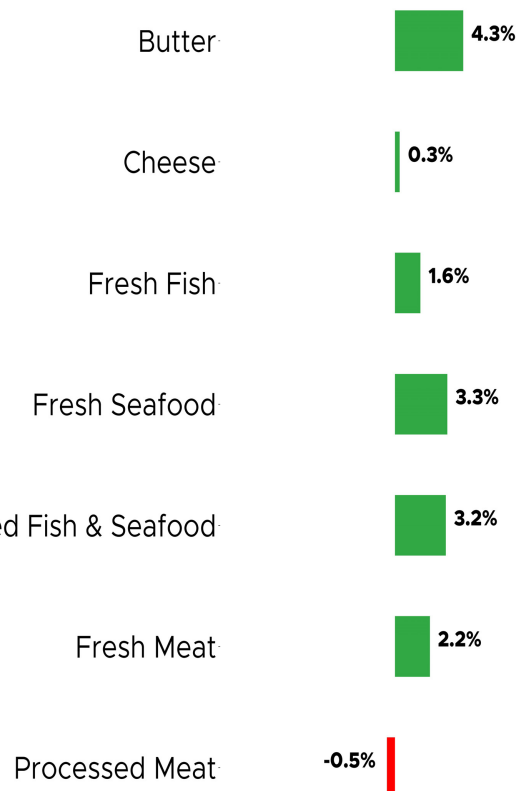
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	32.6	37.5	43.6	49.5	4.8%	4.3%
Cheese	117.2	120.0	134.2	135.3	0.8%	0.3%
Fresh Fish	345.1	375.3	438.1	459.9	2.8%	1.6%
Fresh Seafood	95.0	108.8	129.2	142.6	4.6%	3.3%
Processed Fish & Seafood	115.6	131.9	156.4	171.9	4.5%	3.2%
Fresh Meat	1,105.0	1,221.7	1,434.2	1,531.2	3.4%	2.2%
Processed Meat	423.1	431.5	492.8	484.9	0.7%	-0.5%

Revenues 2020



Revenue CAGR 23/20 (%)



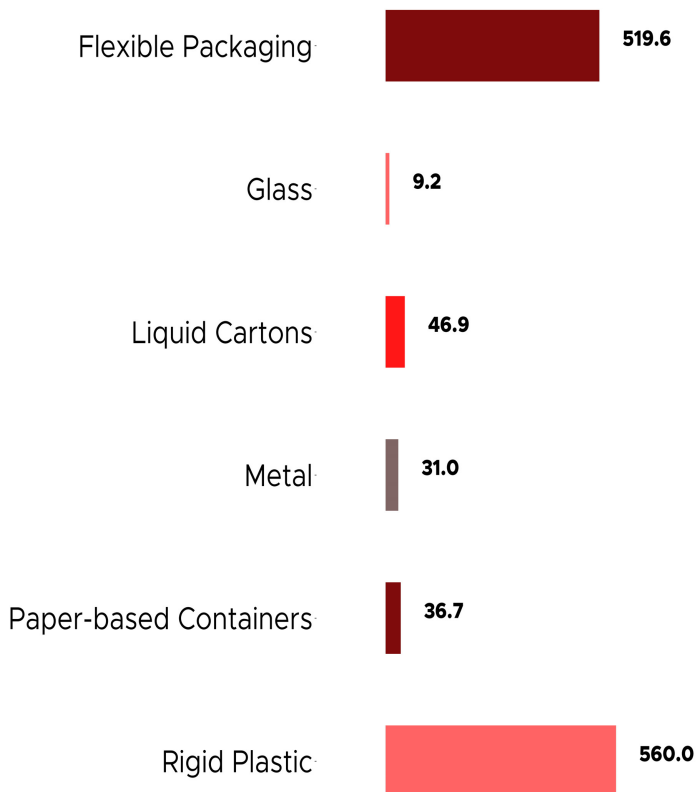


HUNGARY

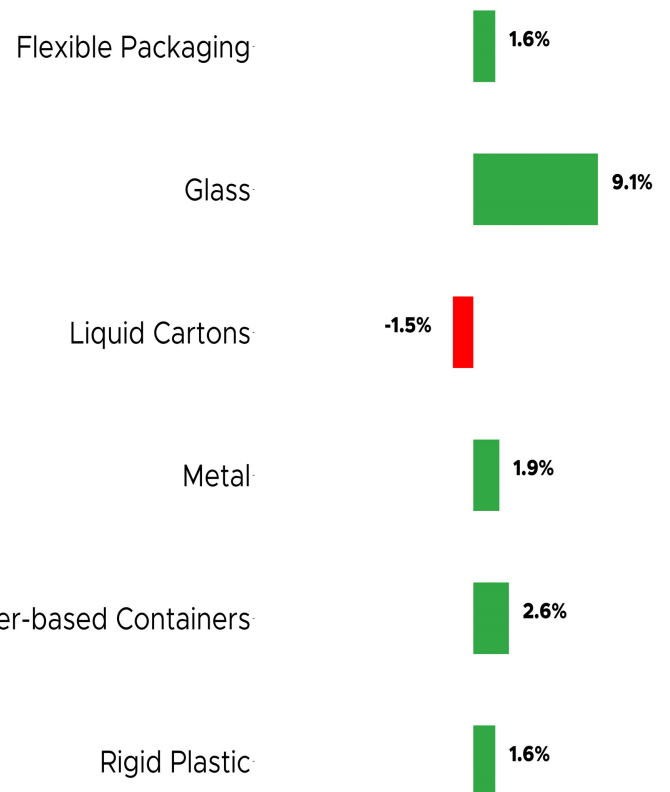
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	483.5	509.0	519.6	544.7	1.7%	1.6%
Glass	7.0	8.4	9.2	11.9	6.5%	9.1%
Liquid Cartons	54.0	47.4	46.9	44.7	-4.2%	-1.5%
Metal	29.8	30.4	31.0	32.7	0.7%	1.9%
Paper-based Containers	34.1	35.7	36.7	39.6	1.6%	2.6%
Rigid Plastic	547.8	551.9	560.0	587.0	0.3%	1.6%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



IRELAND



Consumers

4,994,724

CAGR 15/20

+1.2%



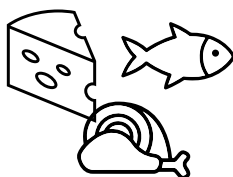
Gdp per capita

71.241 €

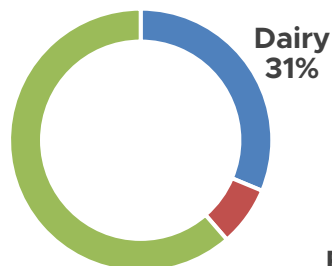
CAGR 15/20

+6.2%

Fresh food processing



Meat
62%

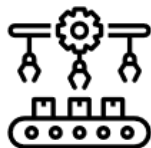


Fish
7%



Most growing category 16/20

Fish +12.25% per year



Food processing & packaging machinery market

99,1 mln €

Packaging type

Most consumed

Rigid Plastic
45.2%



Most growing 20/23

Flexible Packaging
+28.3 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



IRELAND

Meat Processing



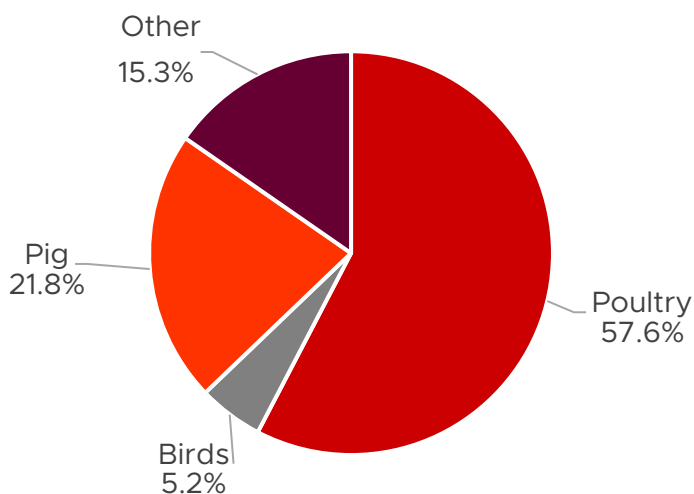
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	639.1	679.0	557.8	576.1	534.5	38%	-4.37%
Processed+Sausage	291.1	397.3	305.3	334.6	320.8	23%	2.46%
Frozen	155.7	171.7	160.7	155.1	138.8	10%	-2.83%
Others	244.3	385.0	375.8	388.2	397.0	29%	12.91%
Total	1,330.2	1,632.9	1,399.7	1,453.9	1,391.1	100%	1.13%

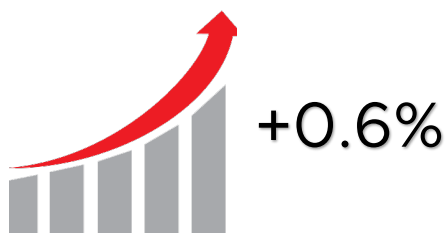
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	2,844.7	3,015.8	2,565.8	2,735.3	2,609.2	53%	-2.14%
Processed+Sausage	1,237.7	1,428.7	1,449.0	1,508.6	1,446.3	30%	3.97%
Frozen	569.5	628.3	645.7	595.1	552.4	11%	-0.76%
Others	243.1	292.0	252.2	281.3	282.4	6%	3.81%
Total	4,895.1	5,364.8	4,912.7	5,120.3	4,890.3	100%	-0.02%

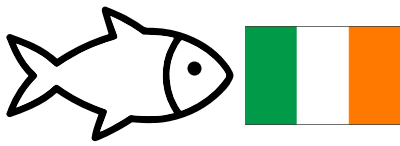
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



IRELAND

Fish Processing

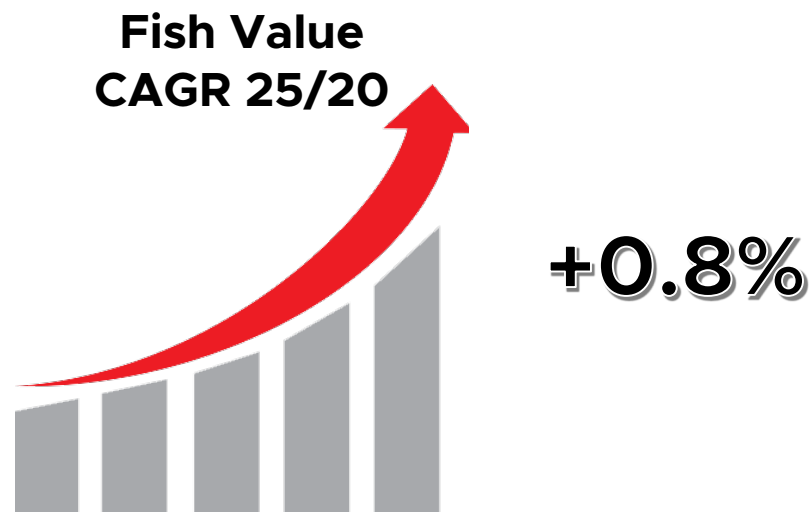


Fish Volume by categories (mln Kg)

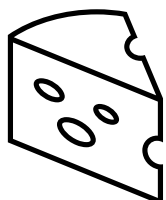
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	0.0	39.7	39.7	40.3	24%	n.a.
Frozen	138.6	165.6	126.8	136.2	110.8	65%	-5.4%
Processed	20.9	20.3	22.6	21.9	19.4	11%	-1.8%
Total	159.5	185.9	189.0	197.7	170.5	100%	1.7%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	195.4	226.1	221.0	221.0	228.8	39%	4.0%
Frozen	196.9	216.9	232.1	238.5	198.1	34%	0.1%
Processed	171.3	160.7	157.6	166.4	158.7	27%	-1.9%
Total	563.7	603.7	610.7	625.8	585.6	100%	1.0%



Source: elaboration on data Eurostat



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Dairy Processing

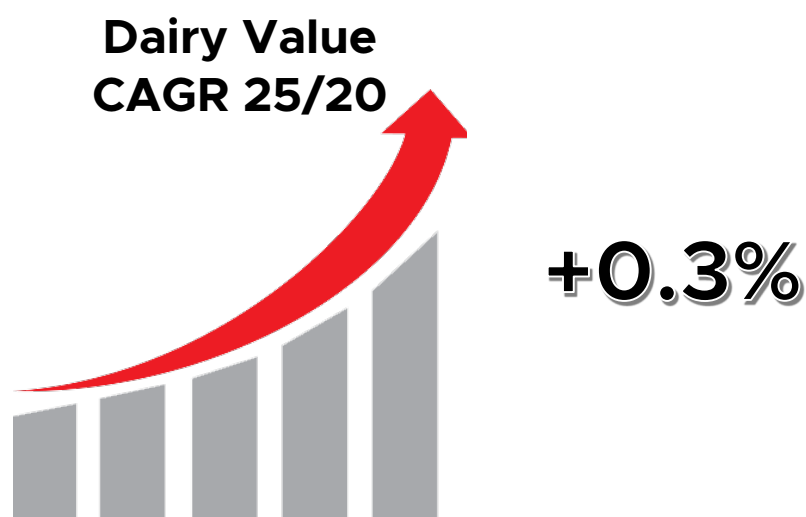


Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	240.3	274.7	276.4	282.1	283.3	45%	4.2%
Butter	276.5	311.3	278.7	334.6	345.7	55%	5.7%
Total	516.8	586.0	555.2	616.7	629.1	100%	5.0%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	705.4	910.2	1,132.1	1,281.8	1,174.0	47%	13.6%
Butter	808.2	1,161.2	1,246.9	1,288.7	1,318.0	53%	13.0%
Total	1,513.6	2,071.4	2,379.0	2,570.5	2,492.1	100%	13.3%



Source: elaboration on data Eurostat



IRELAND

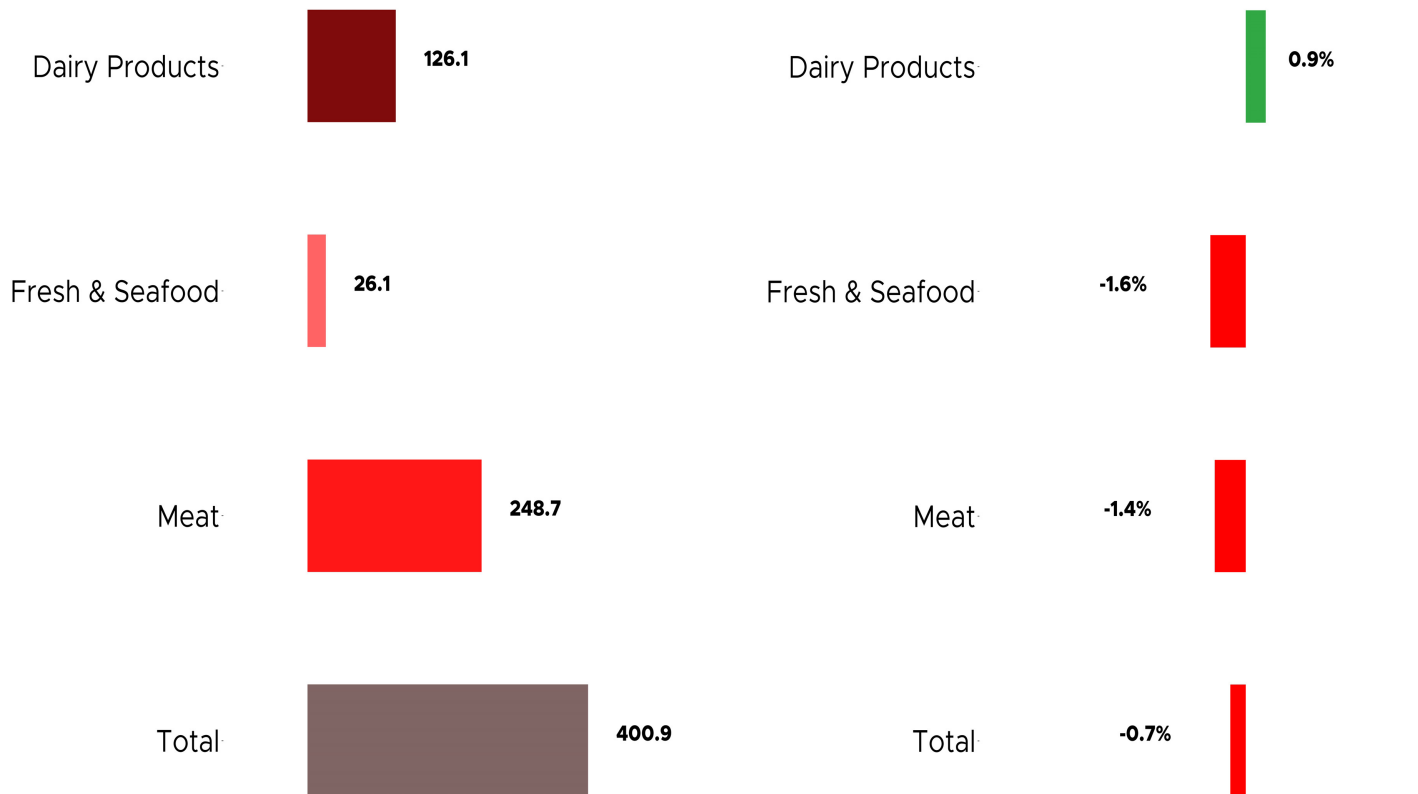
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	89.5	112.2	126.1	129.5	7.8%	0.9%
Fresh & Seafood	20.7	22.9	26.1	24.9	3.4%	-1.6%
Meat	194.8	217.9	248.7	238.5	3.8%	-1.4%
Total	305.1	353.0	400.9	392.9	5.0%	-0.7%

Volume 2020



Volume CAGR 23/20 (%)





IRELAND

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	6.7	7.1	7.9	7.6	2.2%	-1.3%
Cheese	82.9	105.0	118.2	121.9	8.2%	1.0%
Fresh Fish	12.4	14.1	16.2	15.7	4.4%	-1.0%
Fresh Seafood	1.5	1.6	1.9	1.8	3.7%	-1.6%
Processed Fish & Seafood	6.8	7.1	8.0	7.4	1.5%	-2.8%
Fresh Meat	100.2	120.6	140.1	142.8	6.3%	0.6%
Processed Meat	94.6	97.4	108.6	95.8	1.0%	-4.1%





IRELAND



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	458.8	497.2	549.4	528.4	2.7%	-1.3%
Fresh & Seafood	328.7	358.2	407.0	384.3	2.9%	-1.9%
Meat	1,509.6	1,638.6	1,860.4	1,745.1	2.8%	-2.1%
Total	2,297.1	2,494.1	2,816.9	2,657.8	2.8%	-1.9%

Revenues 2020

Volume CAGR 23/20 (%)





IRELAND

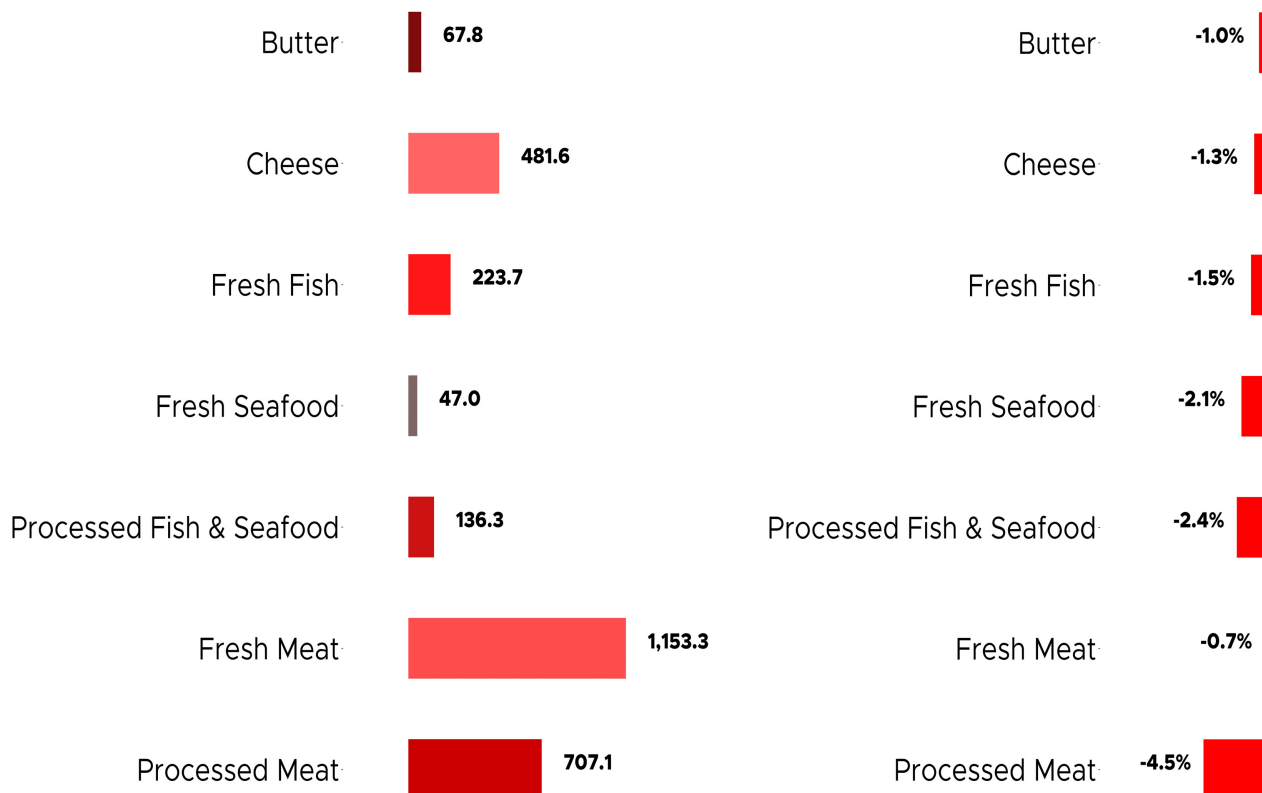


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	56.0	61.2	67.8	65.7	3.0%	-1.0%
Cheese	402.8	436.1	481.6	462.7	2.7%	-1.3%
Fresh Fish	178.0	196.2	223.7	213.6	3.3%	-1.5%
Fresh Seafood	38.3	41.5	47.0	44.1	2.7%	-2.1%
Processed Fish & Seafood	112.4	120.6	136.3	126.6	2.4%	-2.4%
Fresh Meat	884.0	1,002.1	1,153.3	1,129.9	4.3%	-0.7%
Processed Meat	625.6	636.5	707.1	615.2	0.6%	-4.5%

Revenues 2020

Revenue CAGR 23/20 (%)



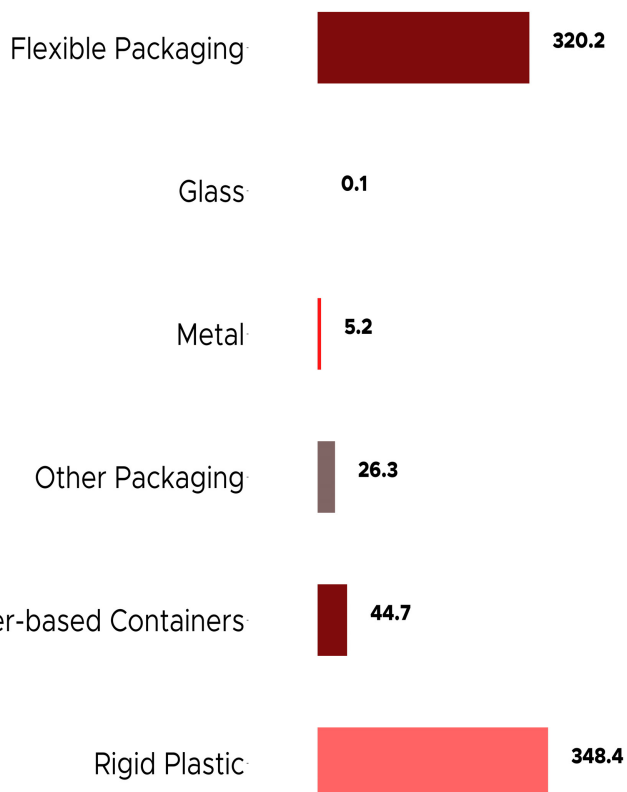


IRELAND

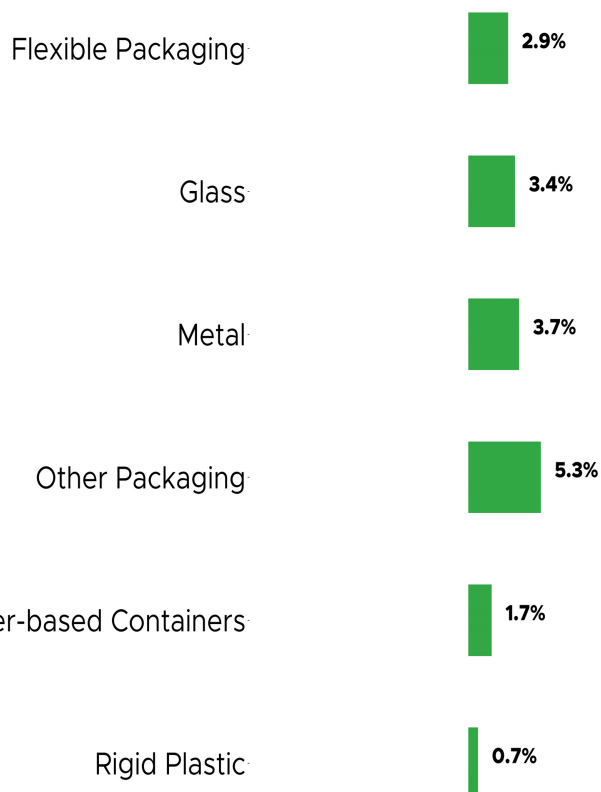
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	291.1	302.0	320.2	348.5	1.2%	2.9%
Glass	0.1	0.1	0.1	0.1	5.2%	3.4%
Metal	4.7	4.9	5.2	5.9	1.8%	3.7%
Other Packaging	23.1	24.6	26.3	30.7	2.1%	5.3%
Paper-based Containers	39.1	41.4	44.7	47.1	2.0%	1.7%
Rigid Plastic	322.4	332.4	348.4	355.8	1.0%	0.7%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



ITALY



Consumers
59,554,023

CAGR 15/20

-0.4%

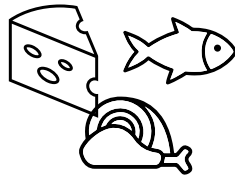


Gdp per capita
26.925 €

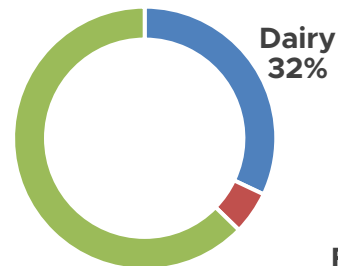
CAGR 15/20

+0.9%

Fresh food processing



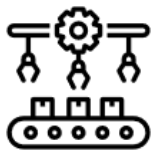
Meat
63%



Fish
5%



Most growing category 16/20
Dairy +7.84% per year



Food processing & packaging machinery market
1.259,9 mln €

Packaging type

Most consumed
Rigid Plastic
46.6%



Most growing 20/23
Rigid Plastic
+ 610.6 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



ITALY

Meat Processing



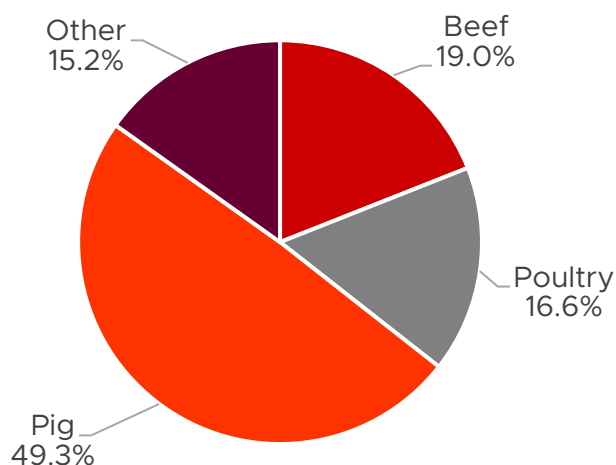
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	4,640.1	4,872.1	4,314.2	4,662.6	4,649.0	60%	0.05%
Processed+Sausage	1,656.7	1,576.8	1,937.6	1,808.8	1,725.7	22%	1.02%
Frozen	126.5	146.6	230.7	218.3	227.9	3%	15.86%
Others	1,241.8	1,271.5	1,399.8	1,316.6	1,155.9	15%	-1.78%
Total	7,665.2	7,867.0	7,882.4	8,006.3	7,758.6	100%	0.30%

Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	11,035.6	12,165.3	10,052.7	11,988.1	11,084.3	51%	0.11%
Processed+Sausage	8,649.2	8,716.8	9,510.6	9,448.7	8,893.4	41%	0.70%
Frozen	229.4	280.4	520.5	423.1	514.5	2%	22.38%
Others	1,253.2	1,236.8	1,381.5	1,231.3	1,202.9	6%	-1.02%
Total	21,167.4	22,399.2	21,465.4	23,091.2	21,695.1	100%	0.62%

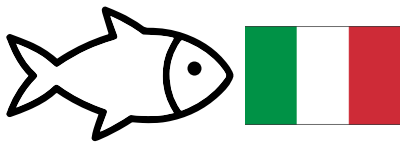
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



ITALY

Fish Processing



Fish Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	6.2	8.4	11.2	57.4	13.9	4%	22.6%
Frozen	50.0	59.1	27.5	48.5	54.8	15%	2.3%
Processed	161.9	172.6	152.4	290.7	288.8	81%	15.6%
Total	218.1	240.1	191.1	396.6	357.4	100%	13.1%

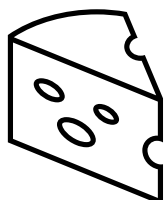
Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	49.0	55.5	72.6	209.4	122.6	7%	25.7%
Frozen	218.3	280.9	146.7	155.8	216.5	12%	-0.2%
Processed	1,144.3	1,266.2	1,295.1	1,413.9	1,486.2	81%	6.8%
Total	1,411.7	1,602.6	1,514.4	1,779.1	1,825.2	100%	6.6%

Fish Value CAGR 25/20



Source: elaboration on data Eurostat



ITALY

Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	1,234.0	1,261.0	1,308.0	1,327.0	1,345.0	93%	2.2%
Butter	95.0	91.0	96.0	96.0	94.0	7%	-0.3%
Total	1,329.0	1,352.0	1,404.0	1,423.0	1,439.0	100%	2.0%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	2,961.2	8,039.0	8,277.0	3,983.4	4,081.4	90%	8.4%
Butter	387.7	399.8	451.4	479.5	462.2	10%	4.5%
Total	3,348.9	8,438.8	8,728.4	4,462.9	4,543.6	100%	7.9%

Dairy Value CAGR 25/20



-0.1%

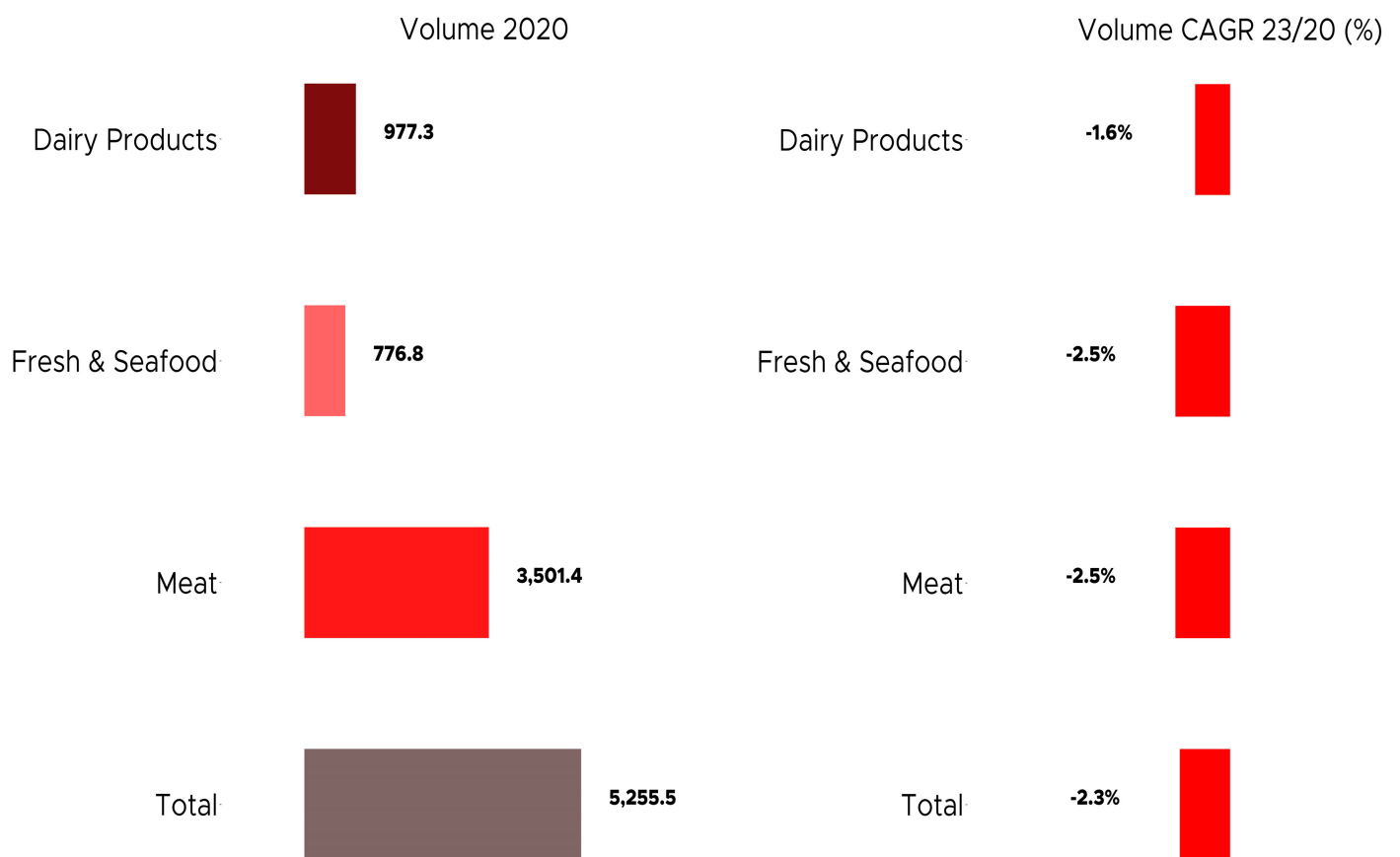
Source: elaboration on data Eurostat



ITALY

Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	868.7	900.2	977.3	931.0	1.2%	-1.6%
Fresh & Seafood	718.1	703.7	776.8	719.5	-0.7%	-2.5%
Meat	3,167.1	3,174.3	3,501.4	3,244.0	0.1%	-2.5%
Total	4,753.8	4,778.2	5,255.5	4,894.5	0.2%	-2.3%

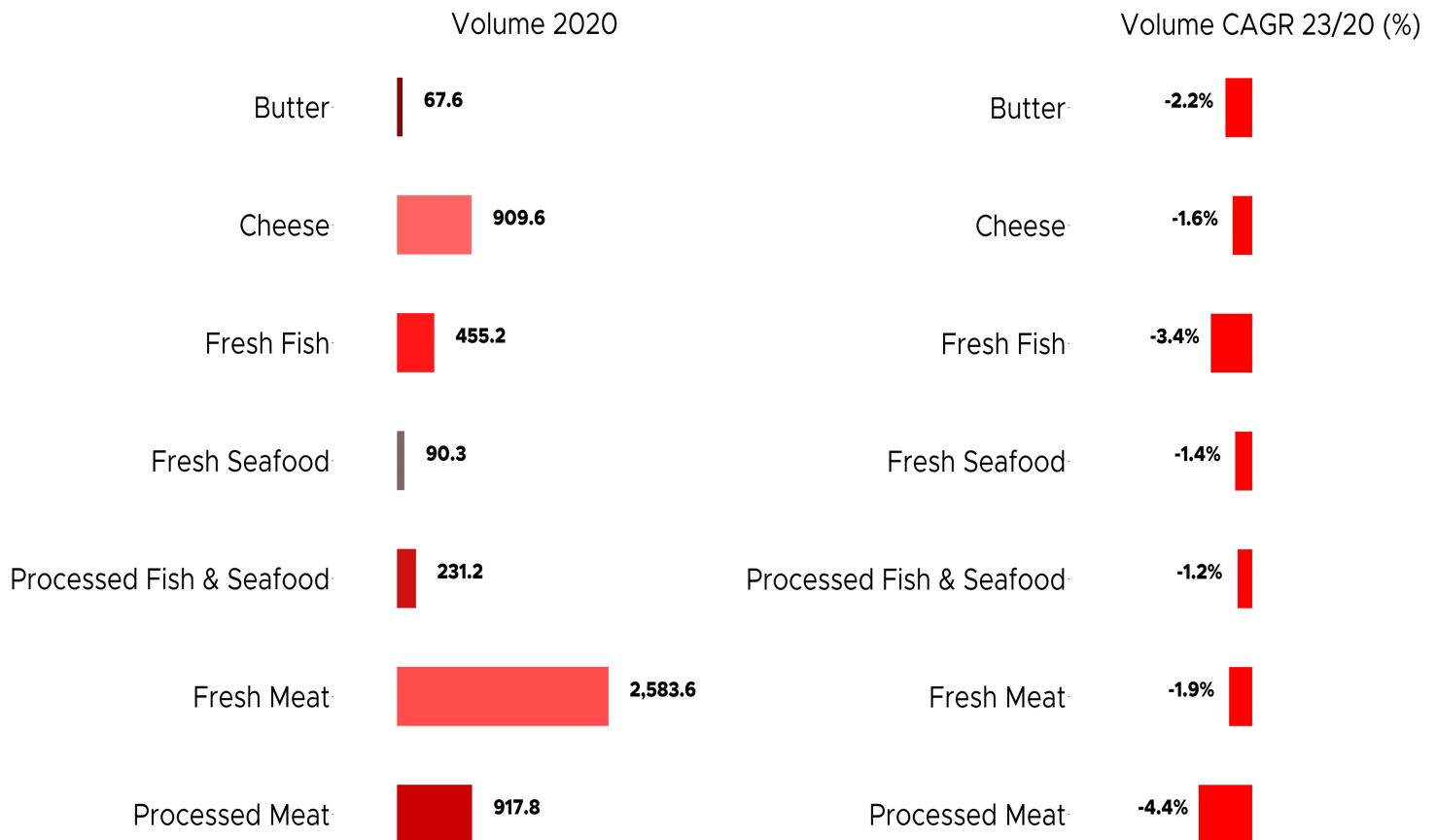




ITALY

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	65.5	62.5	67.6	63.2	-1.6%	-2.2%
Cheese	803.1	837.8	909.6	867.8	1.4%	-1.6%
Fresh Fish	440.9	415.9	455.2	410.1	-1.9%	-3.4%
Fresh Seafood	80.1	80.8	90.3	86.6	0.3%	-1.4%
Processed Fish & Seafood	197.0	207.1	231.2	222.7	1.7%	-1.2%
Fresh Meat	2,275.8	2,326.7	2,583.6	2,442.8	0.7%	-1.9%
Processed Meat	891.3	847.6	917.8	801.2	-1.7%	-4.4%





ITALY

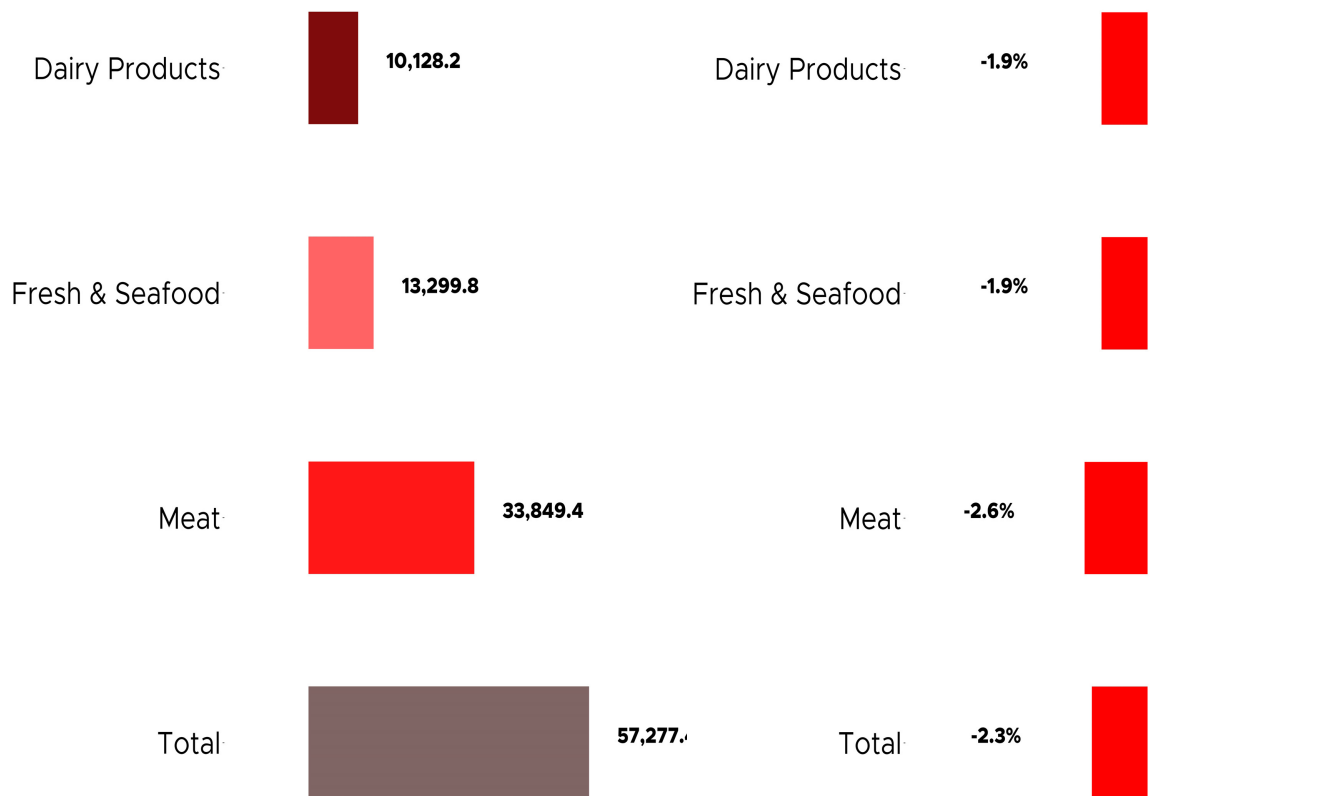


Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	9,313.8	9,341.5	10,128.2	9,562.8	0.1%	-1.9%
Fresh & Seafood	11,732.3	11,978.0	13,299.8	12,552.5	0.7%	-1.9%
Meat	30,741.0	30,706.8	33,849.4	31,263.4	-0.0%	-2.6%
Total	51,787.1	52,026.3	57,277.4	53,378.8	0.2%	-2.3%

Revenues 2020

Volume CAGR 23/20 (%)





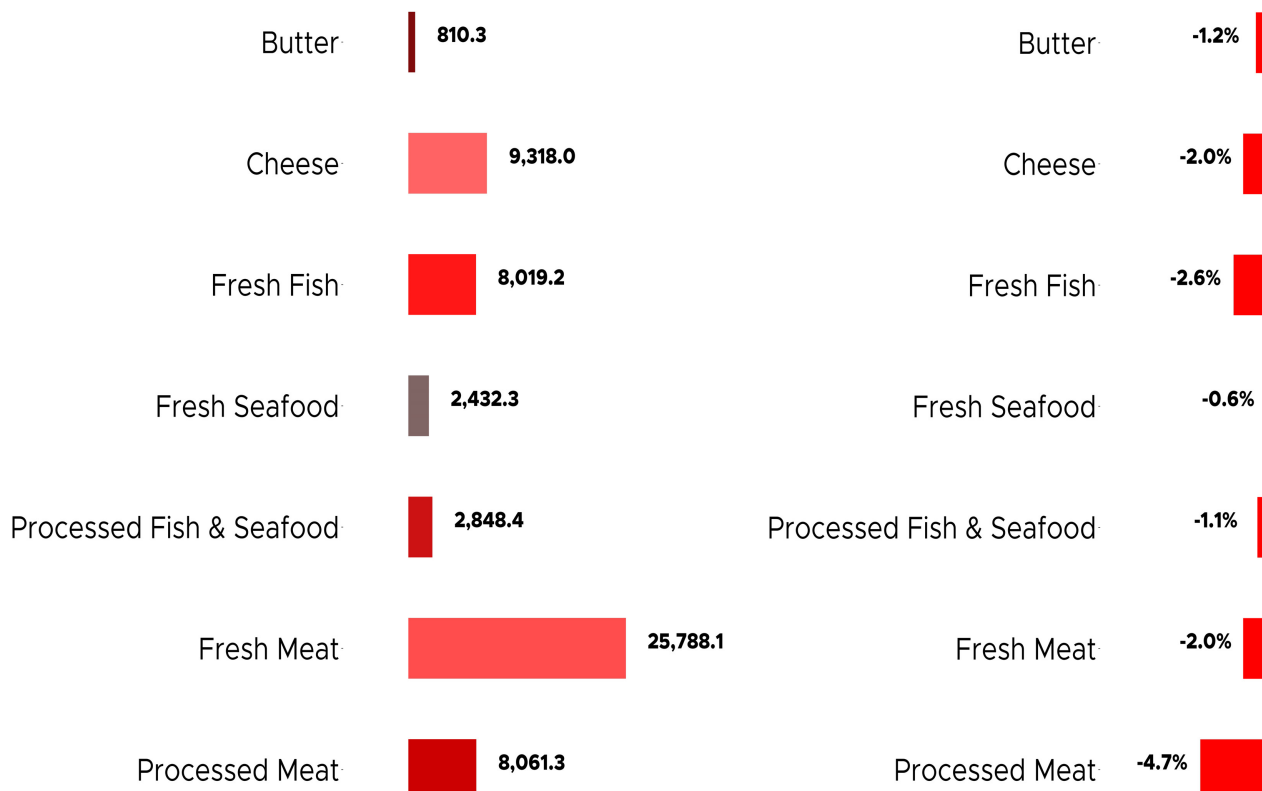
ITALY

Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	724.7	742.2	810.3	780.8	0.8%	-1.2%
Cheese	8,589.1	8,599.3	9,318.0	8,782.0	0.0%	-2.0%
Fresh Fish	7,283.9	7,275.0	8,019.2	7,405.7	-0.0%	-2.6%
Fresh Seafood	2,023.1	2,159.6	2,432.3	2,391.2	2.2%	-0.6%
Processed Fish & Seafood	2,425.4	2,543.4	2,848.4	2,755.7	1.6%	-1.1%
Fresh Meat	22,819.0	23,243.9	25,788.1	24,276.4	0.6%	-2.0%
Processed Meat	7,922.0	7,463.0	8,061.3	6,987.0	-2.0%	-4.7%

Revenues 2020

Revenue CAGR 23/20 (%)





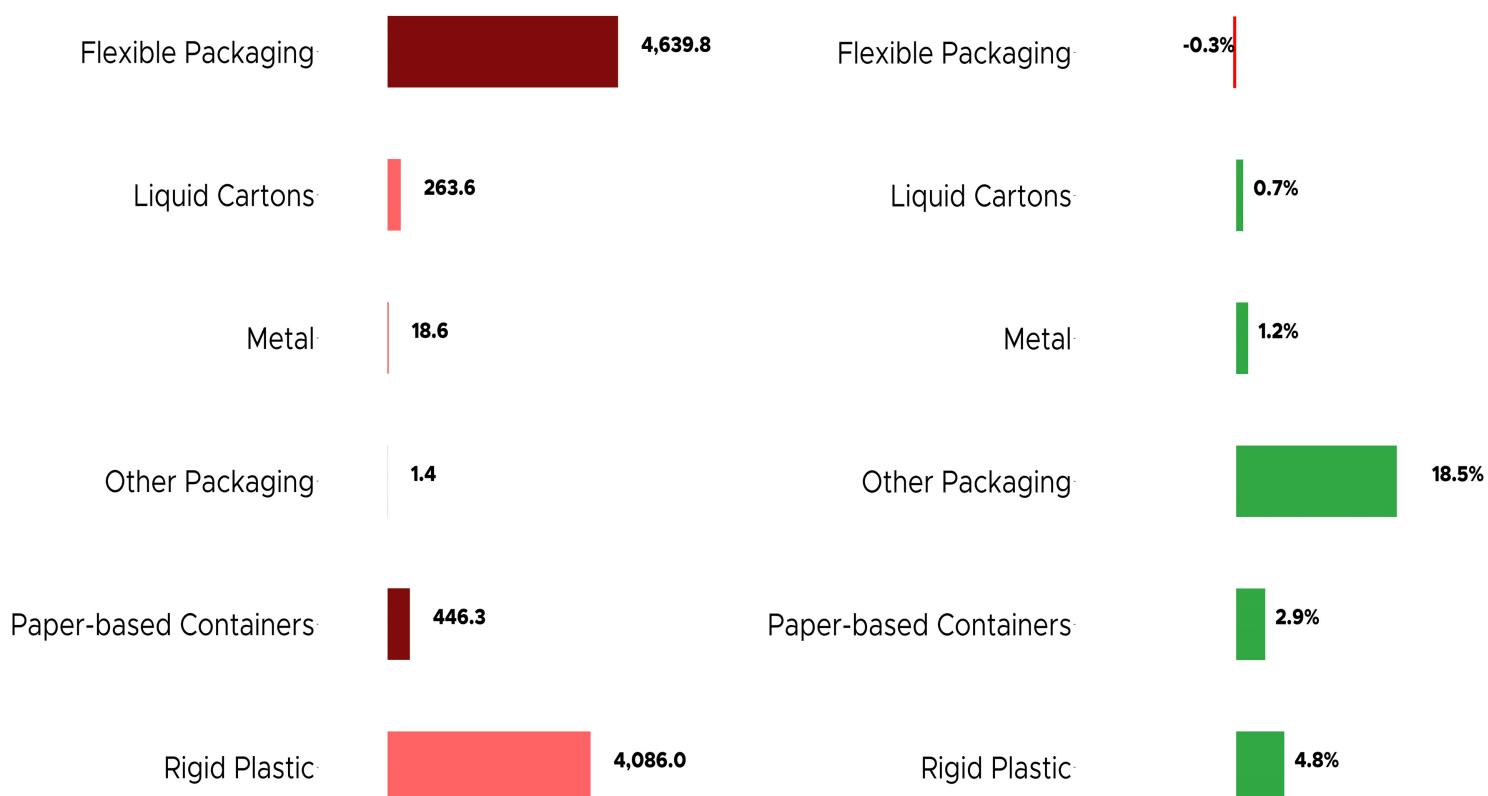
ITALY

Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	4,444.8	4,492.8	4,639.8	4,596.9	0.4%	-0.3%
Liquid Cartons	239.2	257.1	263.6	269.3	2.4%	0.7%
Metal	24.0	18.0	18.6	19.3	-9.2%	1.2%
Other Packaging	0.7	1.3	1.4	2.3	24.5%	18.5%
Paper-based Containers	348.3	413.5	446.3	485.6	5.9%	2.9%
Rigid Plastic	3,209.8	3,694.1	4,086.0	4,696.6	4.8%	4.8%

Pack type 2020 (mln units)

Pack type CAGR 23/20 (%)



MACEDONIA



Consumers
2,083,380

CAGR 15/20

+0.0%

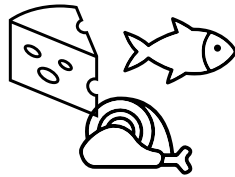


Gdp per capita
5.005 €

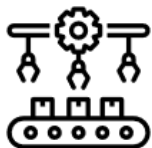
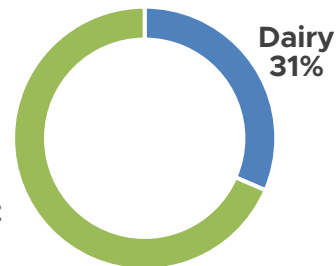
CAGR 15/20

+4.0%

Fresh food processing



Meat
69%



Food processing & packaging machinery market
4,9 mln €

Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



MACEDONIA

Meat Processing



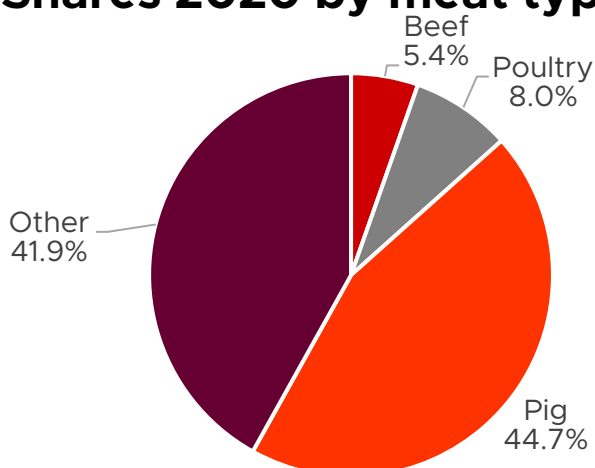
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	5.5	6.3	6.0	5.7	1.3	7%	-30.61%
Processed+Sausage	20.4	19.9	20.5	18.7	16.7	90%	-4.78%
Frozen	0.0	0.0	0.0	0.4	0.4	2%	n.a.
Others	0.0	0.0	0.0	0.0	0.1	1%	n.a.
Total	25.9	26.2	26.4	24.8	18.5	100%	-8.05%

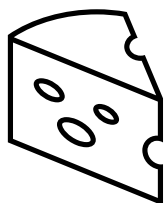
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	12.4	14.5	11.2	11.6	2.5	5%	-32.76%
Processed+Sausage	52.2	49.3	52.8	48.2	46.2	92%	-2.98%
Frozen	0.0	0.0	0.0	1.1	1.1	2%	n.a.
Others	0.0	0.0	0.0	0.0	0.4	1%	n.a.
Total	64.6	63.8	64.0	60.8	50.2	100%	-6.12%

Shares 2020 by meat type



Source: elaboration on data Eurostat



MACEDONIA

Dairy Processing



Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	13.3	14.7	10.9	11.2	6.9	99%	-15.2%
Butter	0.5	0.4	0.1	0.2	0.1	1%	-31.7%
Total	13.7	15.0	11.0	11.4	7.0	100%	-15.6%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	36.7	41.5	29.8	30.0	22.6	98%	-11.4%
Butter	1.7	1.4	0.6	1.0	0.4	2%	-29.8%
Total	38.5	42.9	30.4	31.0	23.0	100%	-12.0%

Source: elaboration on data Eurostat



MACEDONIA

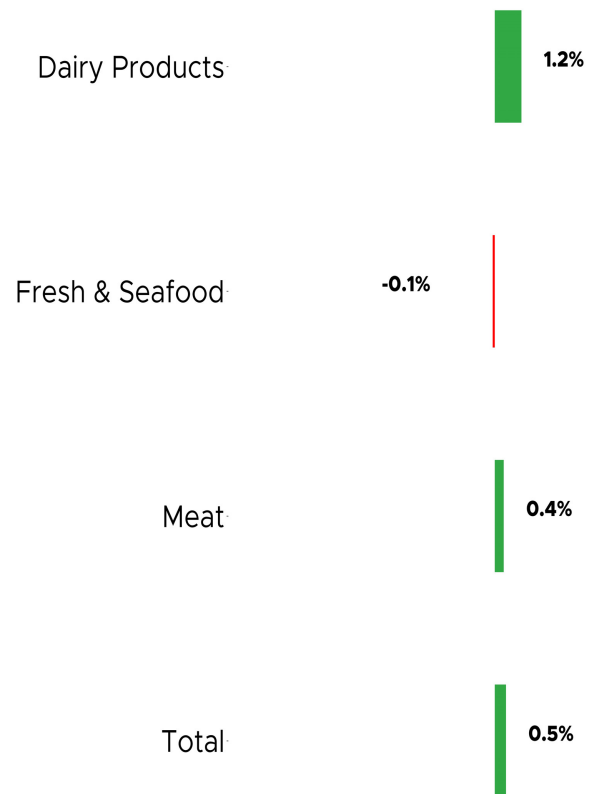
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	21.5	22.1	24.5	25.4	1.0%	1.2%
Fresh & Seafood	11.5	11.2	12.5	12.5	-0.8%	-0.1%
Meat	84.7	85.4	95.2	96.3	0.3%	0.4%
Total	117.7	118.8	132.3	134.1	0.3%	0.5%

Volume 2020



Volume CAGR 23/20 (%)

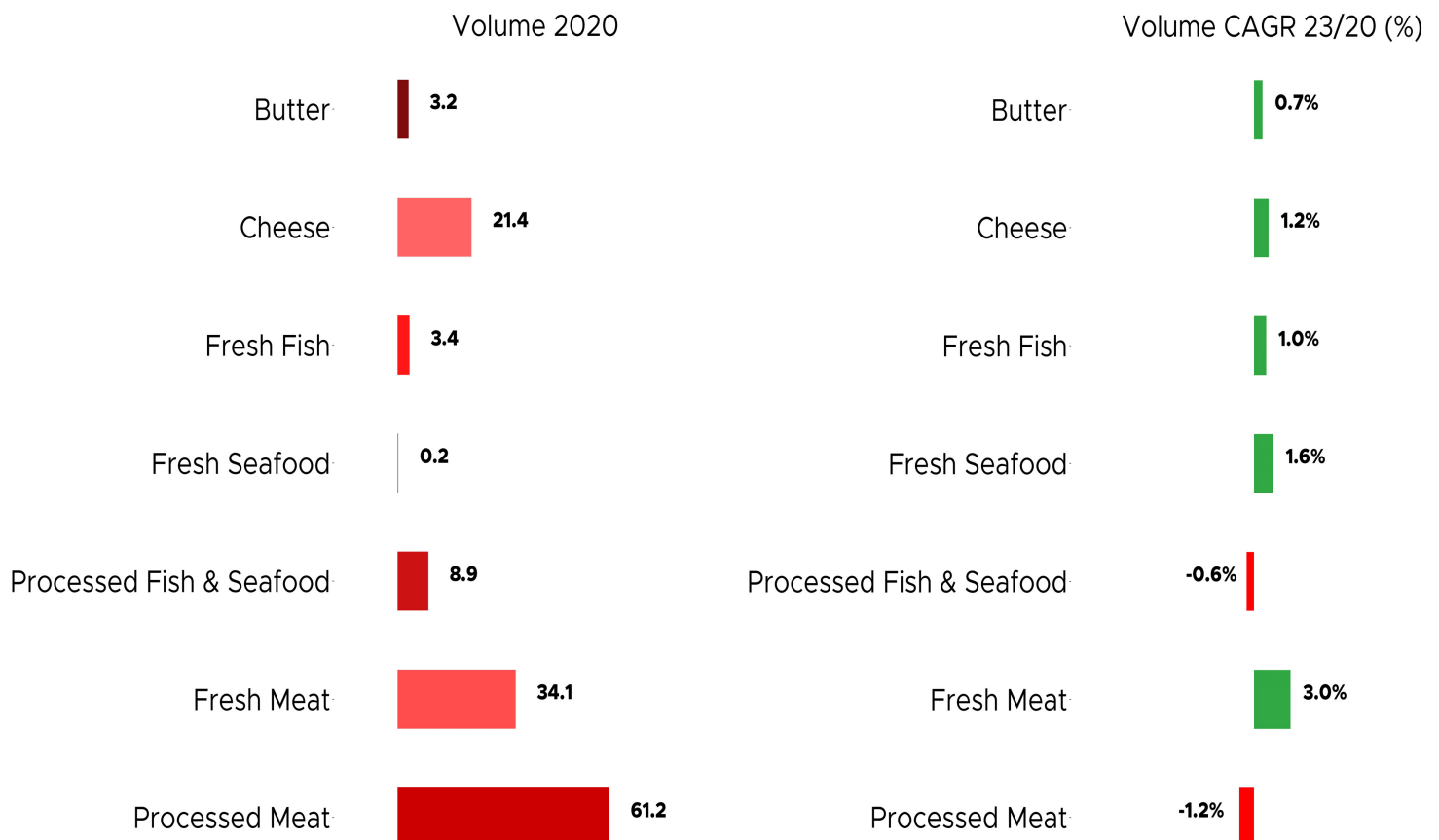




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Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	2.9	2.9	3.2	3.2	-0.5%	0.7%
Cheese	18.6	19.3	21.4	22.1	1.2%	1.2%
Fresh Fish	3.0	3.0	3.4	3.5	-0.1%	1.0%
Fresh Seafood	0.2	0.2	0.2	0.2	0.0%	1.6%
Processed Fish & Seafood	8.3	8.0	8.9	8.7	-1.1%	-0.6%
Fresh Meat	26.8	29.6	34.1	37.3	3.4%	3.0%
Processed Meat	57.8	55.8	61.2	59.0	-1.2%	-1.2%





MACEDONIA



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	172.5	181.8	201.9	210.8	1.8%	1.4%
Fresh & Seafood	118.0	125.5	142.1	148.4	2.1%	1.4%
Meat	552.9	587.7	664.0	695.3	2.1%	1.5%
Total	843.4	895.0	1,008.0	1,054.5	2.0%	1.5%

Revenues 2020

Volume CAGR 23/20 (%)





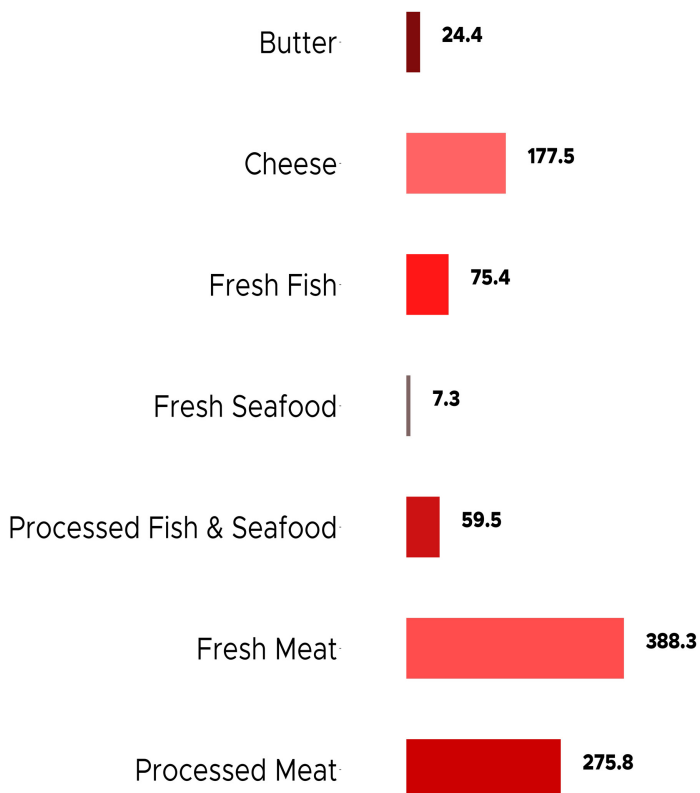
MACEDONIA



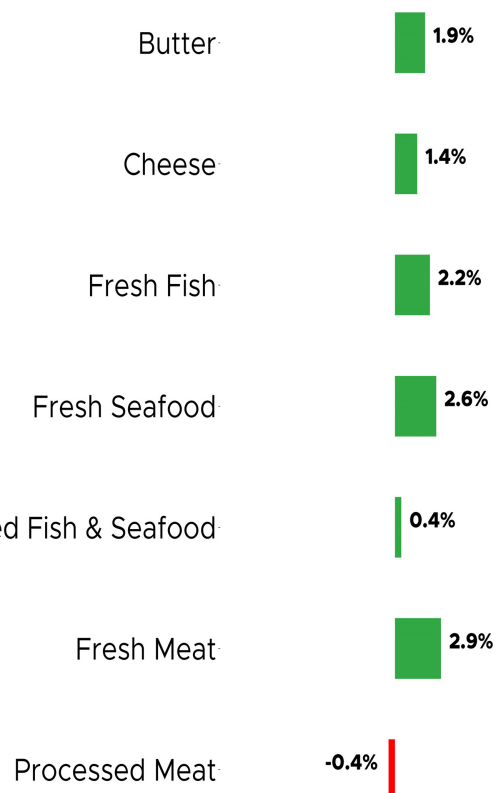
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	20.5	21.9	24.4	25.8	2.2%	1.9%
Cheese	152.0	159.9	177.5	185.0	1.7%	1.4%
Fresh Fish	60.8	66.1	75.4	80.5	2.8%	2.2%
Fresh Seafood	5.7	6.3	7.3	7.8	3.4%	2.6%
Processed Fish & Seafood	51.5	53.1	59.5	60.1	1.0%	0.4%
Fresh Meat	303.7	338.0	388.3	422.9	3.6%	2.9%
Processed Meat	249.2	249.7	275.8	272.4	0.1%	-0.4%

Revenues 2020



Revenue CAGR 23/20 (%)



MONTENEGRO



Consumers

621,718

CAGR 15/20

+0.0%

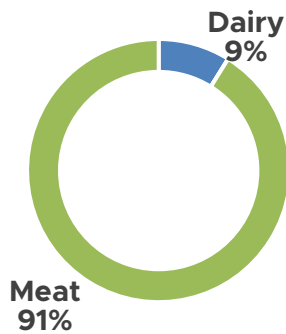
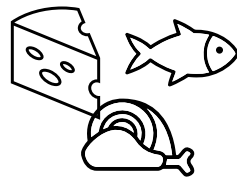


Gdp per capita

6.533 €

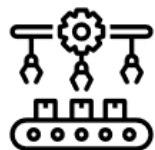
CAGR 15/20

+3.4%



Most growing category

Dairy +43.05% per year



Processing & packaging machinery market

0,6 mln €

Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



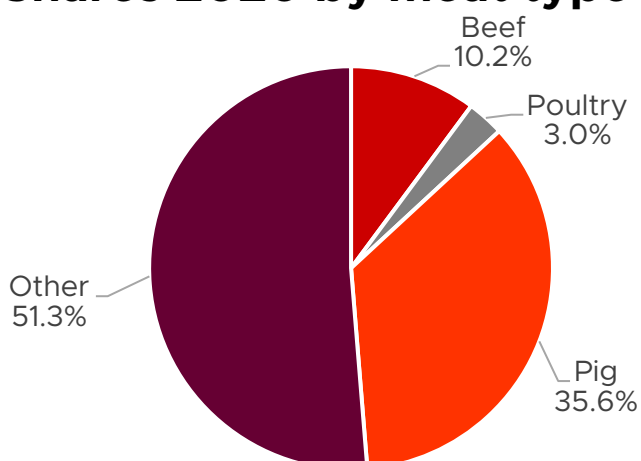
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	1.7	1.7	1.4	1.1	1.5	24%	-3.50%
Processed+Sausage	4.0	4.2	4.1	4.5	4.6	75%	3.46%
Frozen	0.0	0.0	0.0	0.0	0.0	0%	n.a.
Others	0.0	0.0	0.0	0.0	0.0	1%	n.a.
Total	5.7	5.9	5.5	5.7	6.1	100%	1.69%

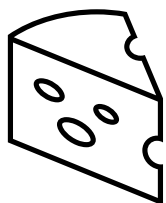
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	6.1	6.0	4.6	4.8	5.5	18%	-2.68%
Processed+Sausage	20.7	22.8	21.4	24.0	25.2	82%	5.06%
Frozen	0.0	0.0	0.0	0.0	0.0	0%	n.a.
Others	0.0	0.0	0.0	0.0	0.2	0%	n.a.
Total	26.8	28.8	26.0	28.8	30.8	100%	3.57%

Shares 2020 by meat type



Source: elaboration on data Eurostat



MONTENEGRO

Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	0.4	0.4	0.6	0.8	1.0	100%	25.5%
Butter	0.0	0.0	0.0	0.0	0.0	0%	n.a.
Total	0.4	0.4	0.6	0.8	1.0	100%	25.5%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	0.7	1.2	2.0	2.5	3.0	100%	43.0%
Butter	0.0	0.0	0.0	0.0	0.0	0%	n.a.
Total	0.7	1.2	2.0	2.5	3.0	100%	43.0%

Source: elaboration on data Eurostat



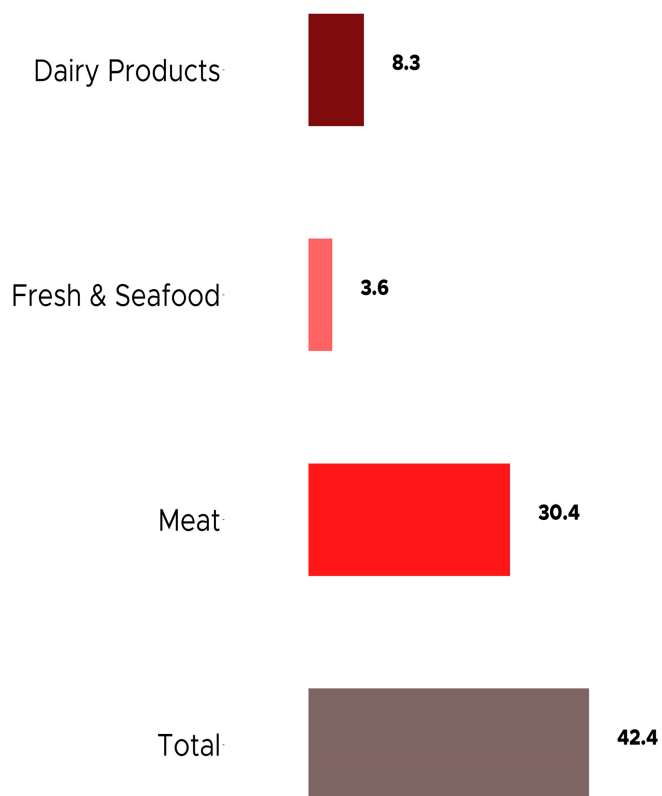
MONTENEGRO



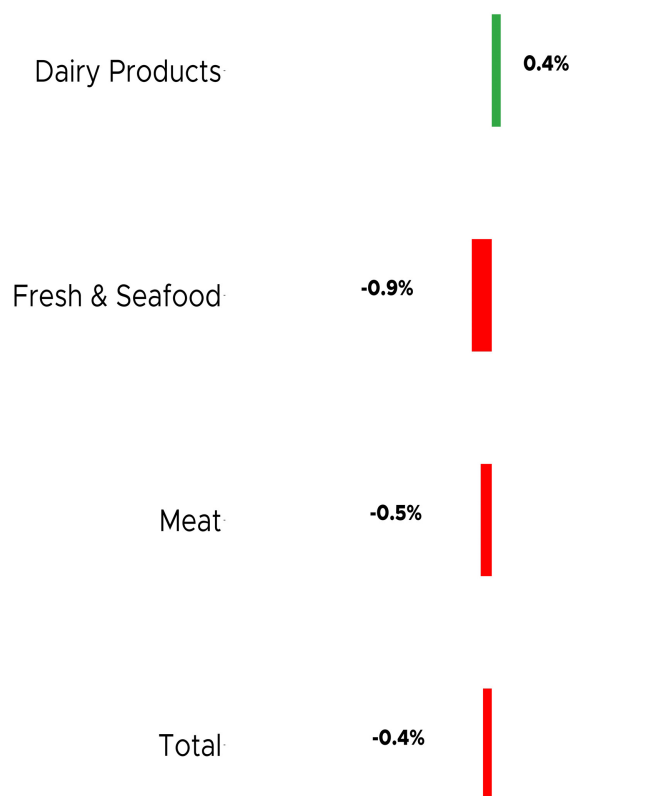
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	7.2	7.6	8.3	8.4	2.0%	0.4%
Fresh & Seafood	3.3	3.3	3.6	3.5	-0.5%	-0.9%
Meat	26.6	27.6	30.4	29.9	1.2%	-0.5%
Total	37.1	38.5	42.4	41.9	1.2%	-0.4%

Volume 2020



Volume CAGR 23/20 (%)

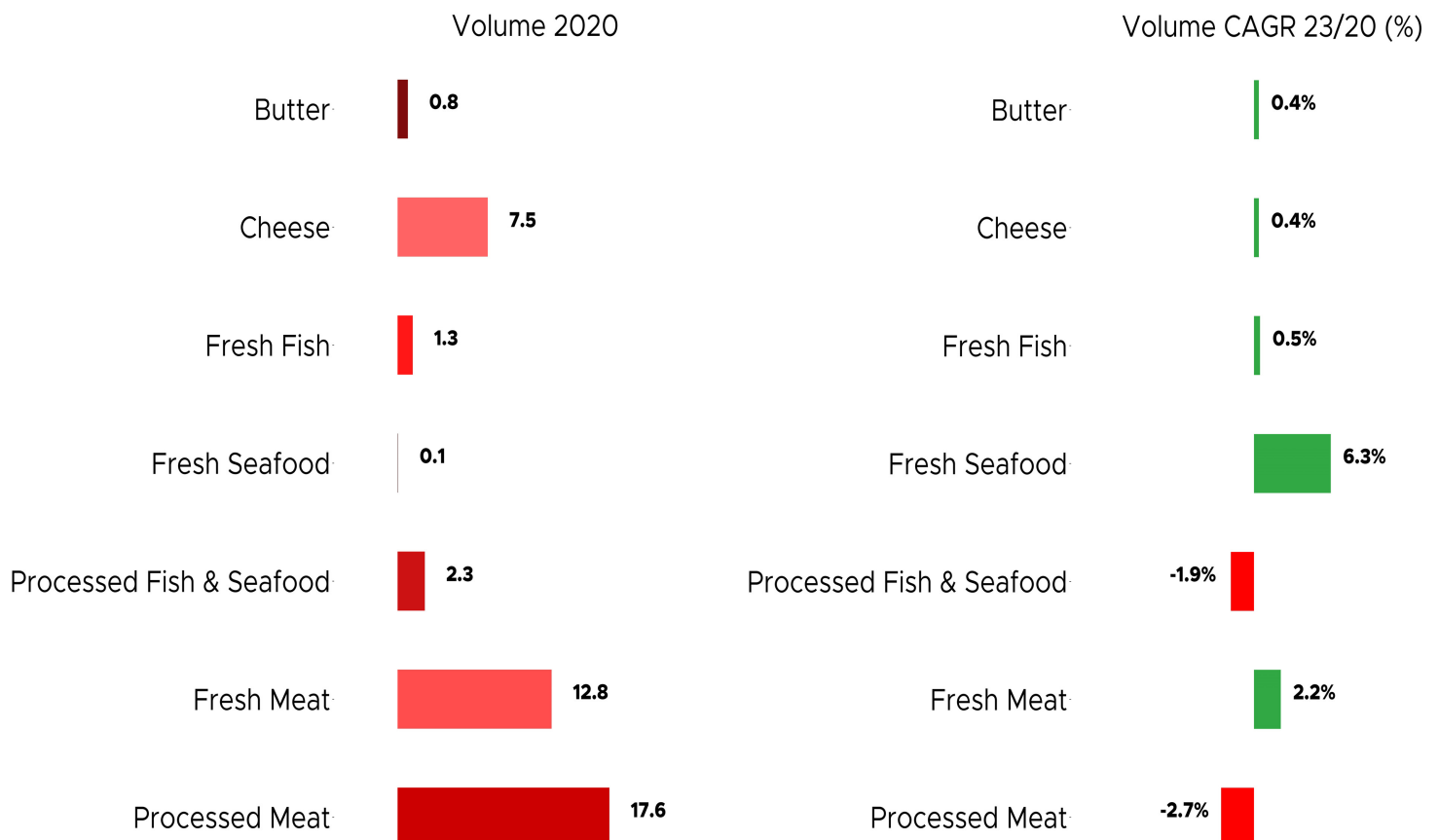




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Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	0.7	0.8	0.8	0.9	2.3%	0.4%
Cheese	6.5	6.9	7.5	7.6	2.0%	0.4%
Fresh Fish	1.1	1.1	1.3	1.3	0.9%	0.5%
Fresh Seafood	0.1	0.1	0.1	0.1	0.0%	6.3%
Processed Fish & Seafood	2.2	2.1	2.3	2.1	-1.2%	-1.9%
Fresh Meat	9.9	11.3	12.8	13.7	4.6%	2.2%
Processed Meat	16.8	16.3	17.6	16.2	-0.9%	-2.7%





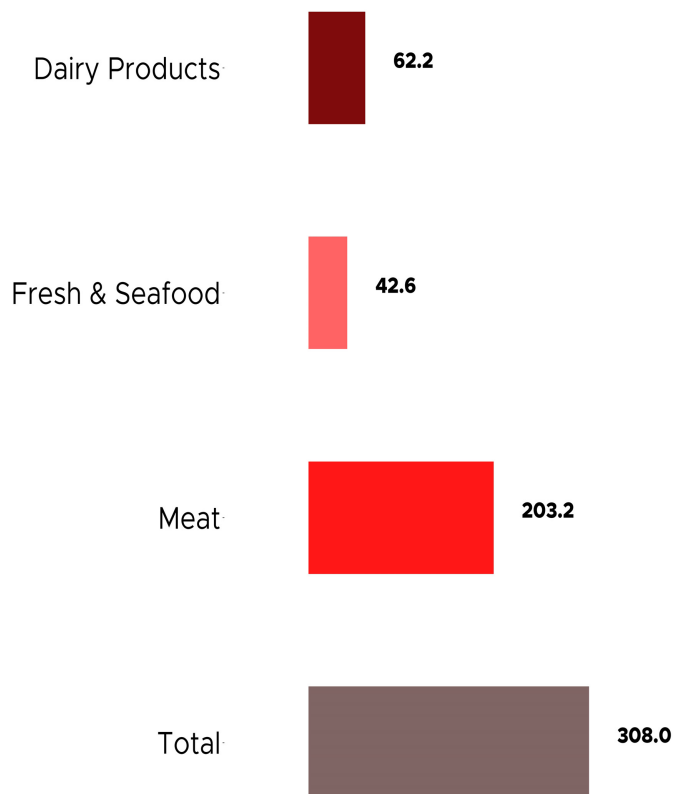
MONTENEGRO



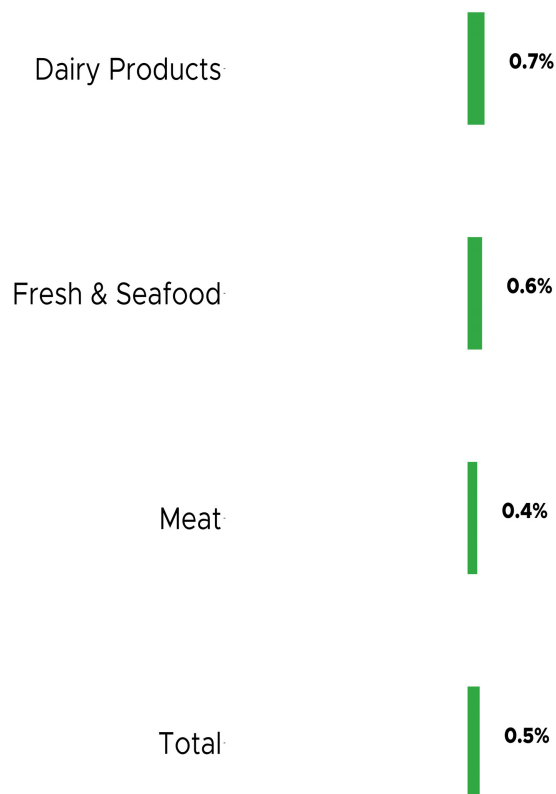
Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	52.3	56.8	62.2	63.5	2.8%	0.7%
Fresh & Seafood	34.8	38.1	42.6	43.4	3.1%	0.6%
Meat	167.6	182.4	203.2	205.6	2.9%	0.4%
Total	254.7	277.4	308.0	312.5	2.9%	0.5%

Revenues 2020



Volume CAGR 23/20 (%)





MONTENEGRO



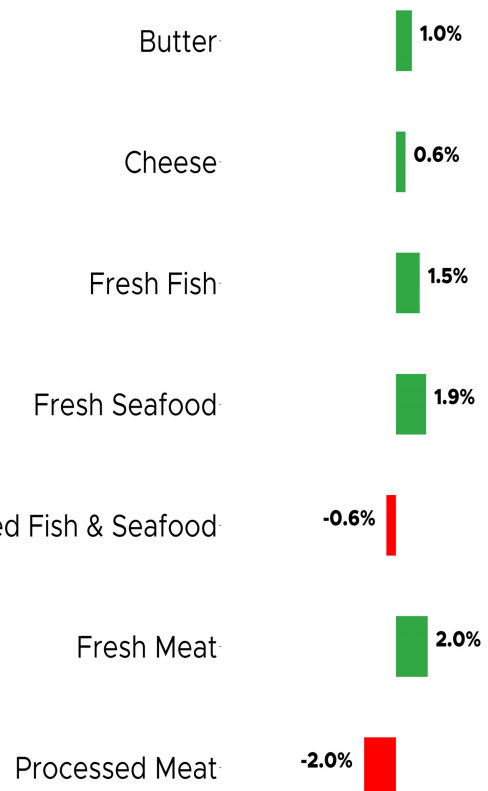
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	6.2	6.8	7.5	7.7	3.1%	1.0%
Cheese	46.1	50.0	54.8	55.8	2.8%	0.6%
Fresh Fish	17.8	20.1	22.6	23.6	4.0%	1.5%
Fresh Seafood	1.2	1.4	1.5	1.6	4.8%	1.9%
Processed Fish & Seafood	15.8	16.7	18.4	18.1	1.9%	-0.6%
Fresh Meat	90.6	103.8	117.6	124.9	4.7%	2.0%
Processed Meat	77.0	78.6	85.6	80.7	0.7%	-2.0%

Revenues 2020



Revenue CAGR 23/20 (%)



MOROCCO



Consumers
36,910,558

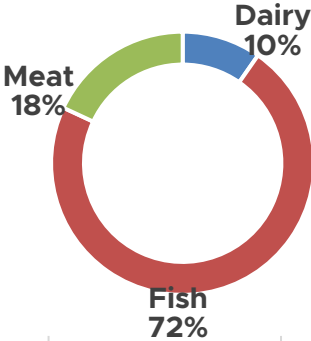
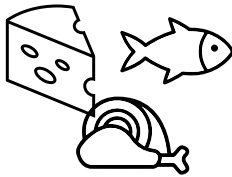
CAGR 15/20
+1.3%



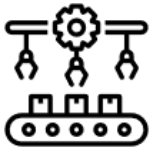
Gdp per capita
2.599 €

CAGR 15/20
+0.9%

Fresh food processing



0% 20% 40% 60% 80% 100%



Food processing & packaging machinery market
46,2 mln €

Packaging type

Most consumed
Rigid Plastic
64.9%



Most growing 20/23
Rigid Plastic
+40.8 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



MOROCCO

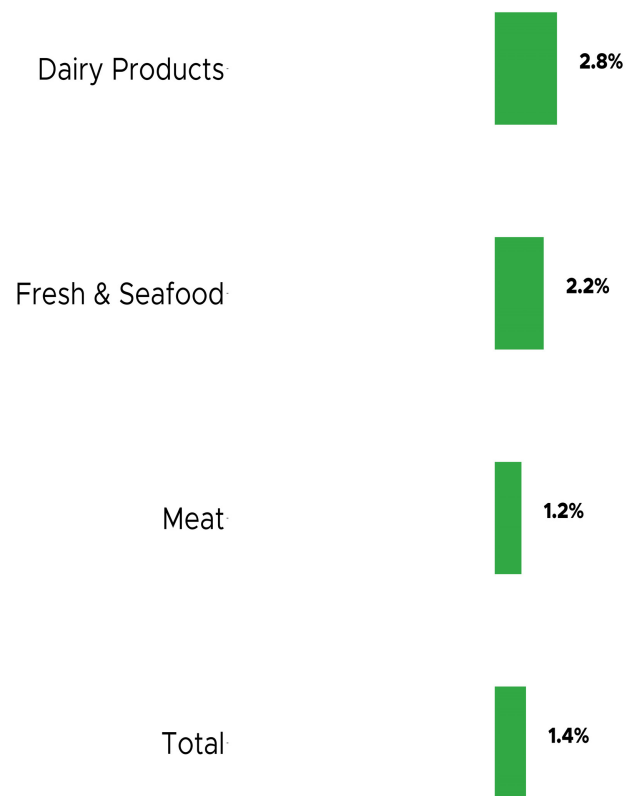
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	29.0	31.9	36.9	40.2	3.1%	2.8%
Fresh & Seafood	80.9	86.9	104.7	111.7	2.4%	2.2%
Meat	510.6	528.4	628.9	651.8	1.1%	1.2%
Total	620.5	647.2	770.5	803.6	1.4%	1.4%

Volume 2020



Volume CAGR 23/20 (%)

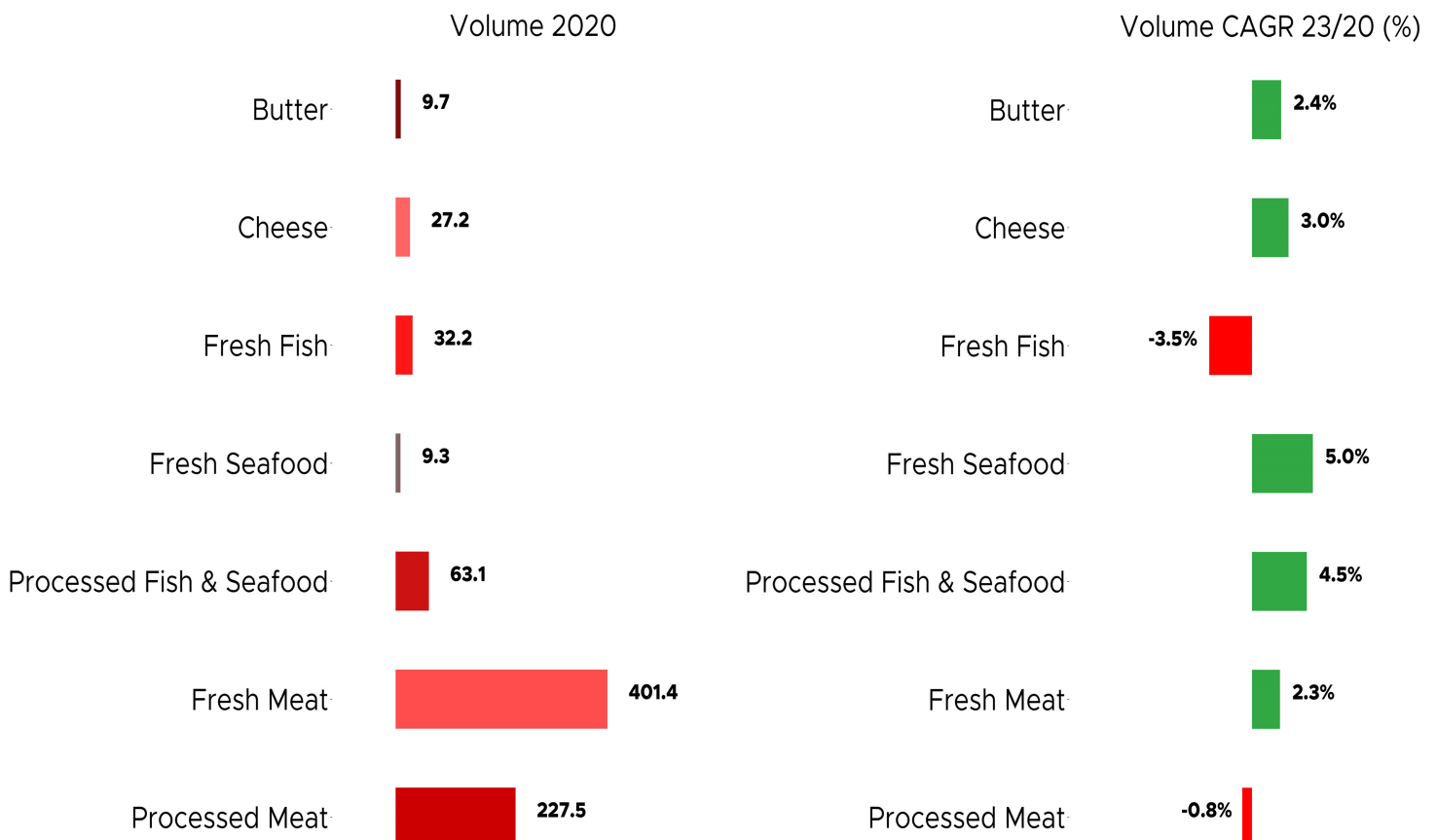




MOROCCO

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	7.9	8.4	9.7	10.4	2.2%	2.4%
Cheese	21.2	23.5	27.2	29.8	3.5%	3.0%
Fresh Fish	32.9	28.4	32.2	29.0	-4.8%	-3.5%
Fresh Seafood	6.0	7.4	9.3	10.7	7.5%	5.0%
Processed Fish & Seafood	42.0	51.1	63.1	72.0	6.8%	4.5%
Fresh Meat	317.4	333.5	401.4	429.4	1.7%	2.3%
Processed Meat	193.2	194.9	227.5	222.4	0.3%	-0.8%





MOROCCO

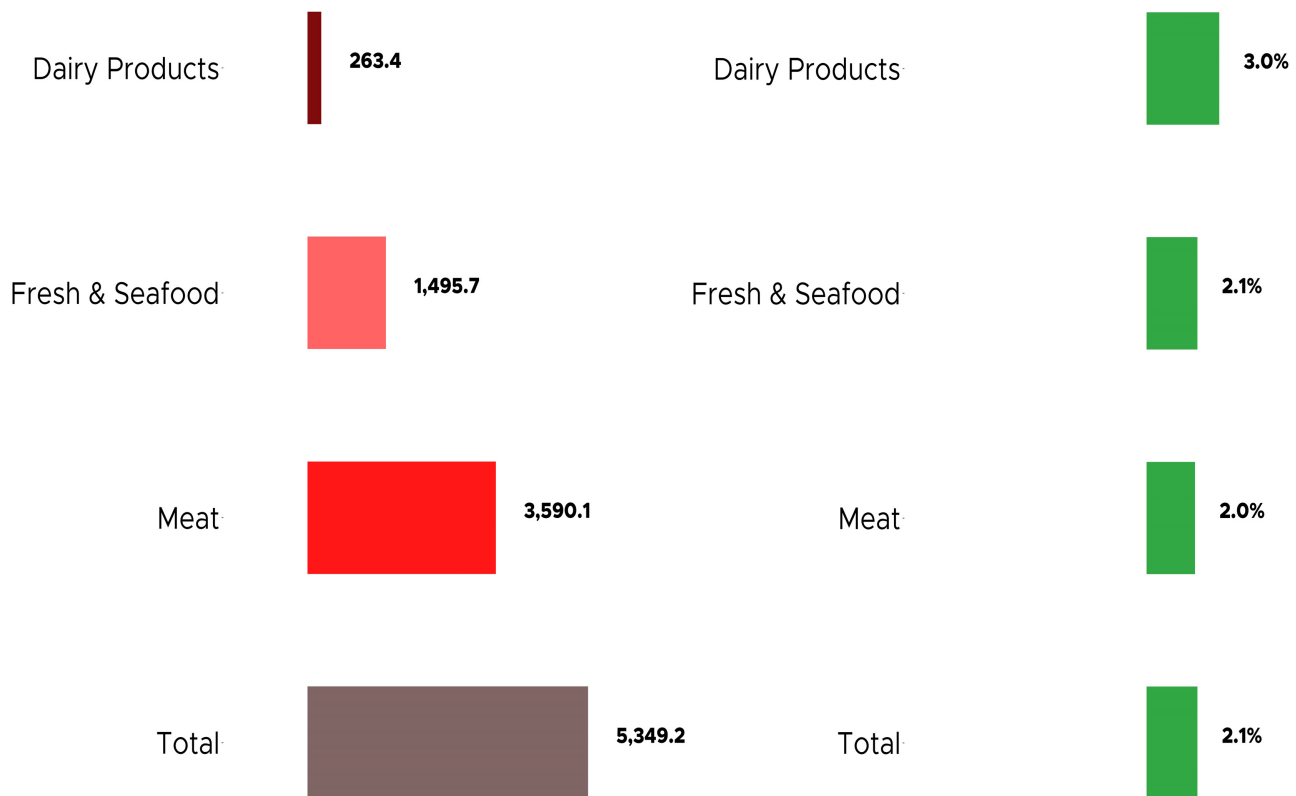


Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	204.4	226.8	263.4	287.8	3.5%	3.0%
Fresh & Seafood	1,134.0	1,247.4	1,495.7	1,590.0	3.2%	2.1%
Meat	2,729.9	2,996.3	3,590.1	3,808.2	3.2%	2.0%
Total	4,068.3	4,470.5	5,349.2	5,686.1	3.2%	2.1%

Revenues 2020

Volume CAGR 23/20 (%)





MOROCCO

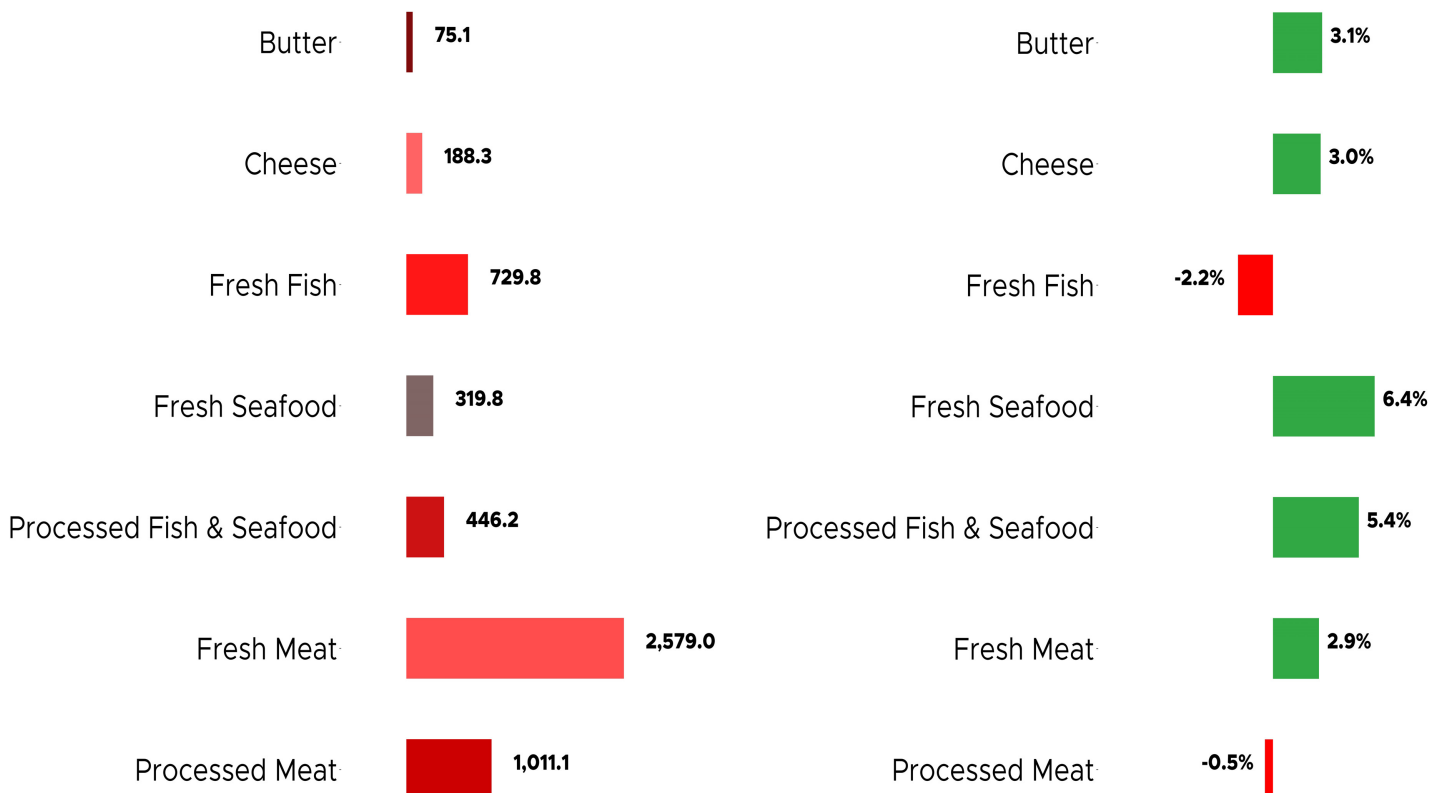


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	58.1	64.6	75.1	82.2	3.6%	3.1%
Cheese	146.3	162.2	188.3	205.6	3.5%	3.0%
Fresh Fish	670.8	637.2	729.8	682.6	-1.7%	-2.2%
Fresh Seafood	185.1	252.8	319.8	385.0	10.9%	6.4%
Processed Fish & Seafood	278.1	357.5	446.2	522.4	8.7%	5.4%
Fresh Meat	1,888.4	2,132.5	2,579.0	2,811.6	4.1%	2.9%
Processed Meat	841.4	863.8	1,011.1	996.5	0.9%	-0.5%

Revenues 2020

Revenue CAGR 23/20 (%)



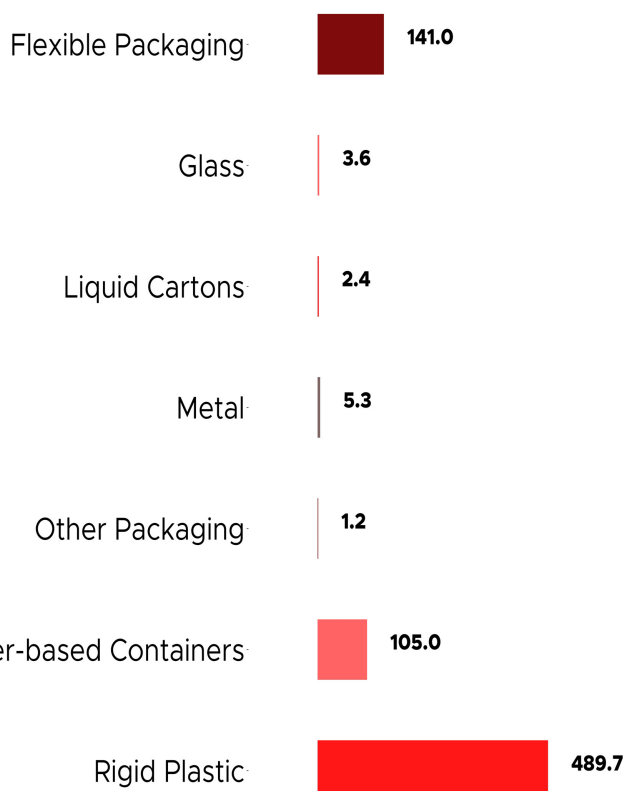


MOROCCO

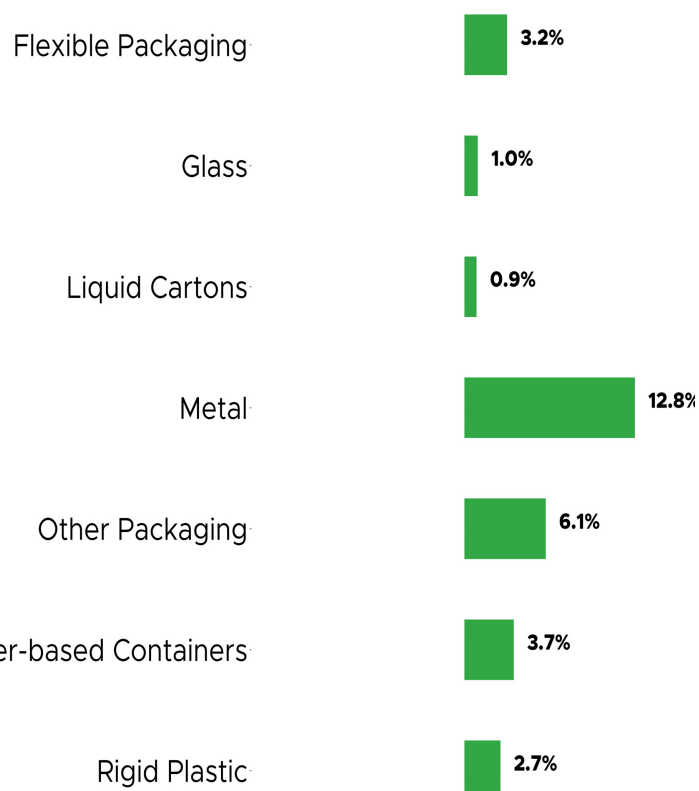
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	124.3	136.1	141.0	154.9	3.1%	3.2%
Glass	3.4	3.5	3.6	3.7	0.9%	1.0%
Liquid Cartons	2.2	2.3	2.4	2.5	1.3%	0.9%
Metal	2.8	4.5	5.3	7.7	17.1%	12.8%
Other Packaging	1.0	1.1	1.2	1.4	5.9%	6.1%
Paper-based Containers	90.8	100.5	105.0	117.1	3.4%	3.7%
Rigid Plastic	427.9	470.4	489.7	530.5	3.2%	2.7%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



POLAND



Consumers
37,950,802

CAGR 15/20

+0.0%

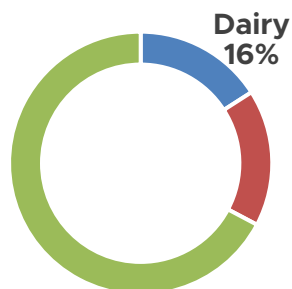
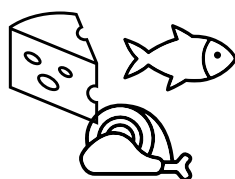


Gdp per capita
13.308 €

CAGR 15/20

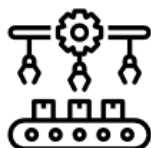
+4.5%

Fresh food processing



Most growing category 16/20

Fish +14.08% per year



Food processing & packaging machinery market

371,3 mln €

Packaging type

Most consumed

Flexible
Packaging 47.4%



Most growing

Rigid Plastic
+ 283.0 mln
pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



POLAND

Meat Processing

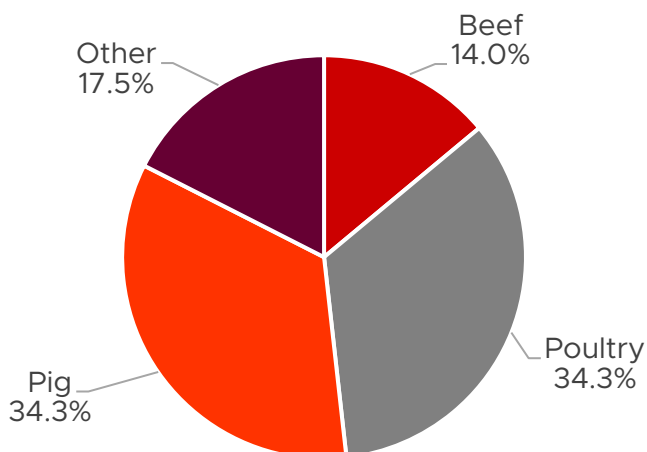
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	4,271.3	4,563.5	4,635.2	4,527.8	4,636.2	61%	2.07%
Processed+Sausage	1,522.6	1,554.1	1,514.4	1,500.2	1,459.5	19%	-1.05%
Frozen	578.1	586.0	615.9	672.5	719.2	9%	5.61%
Others	707.6	754.5	765.1	768.4	823.5	11%	3.86%
Total	7,079.6	7,458.1	7,530.6	7,468.9	7,638.3	100%	1.92%

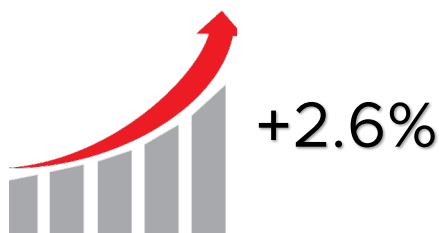
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	7,633.6	8,714.5	8,810.9	9,325.2	8,724.8	58%	3.40%
Processed+Sausage	3,901.9	4,191.0	4,302.5	4,508.6	4,528.3	30%	3.79%
Frozen	975.1	1,056.3	1,140.7	1,119.5	1,099.8	7%	3.05%
Others	411.7	533.0	541.9	569.1	604.1	4%	10.06%
Total	12,922.4	14,494.8	14,795.9	15,522.5	14,956.9	100%	3.72%

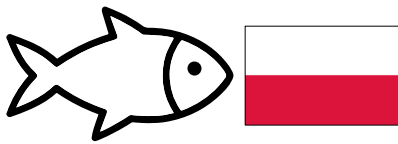
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



POLAND

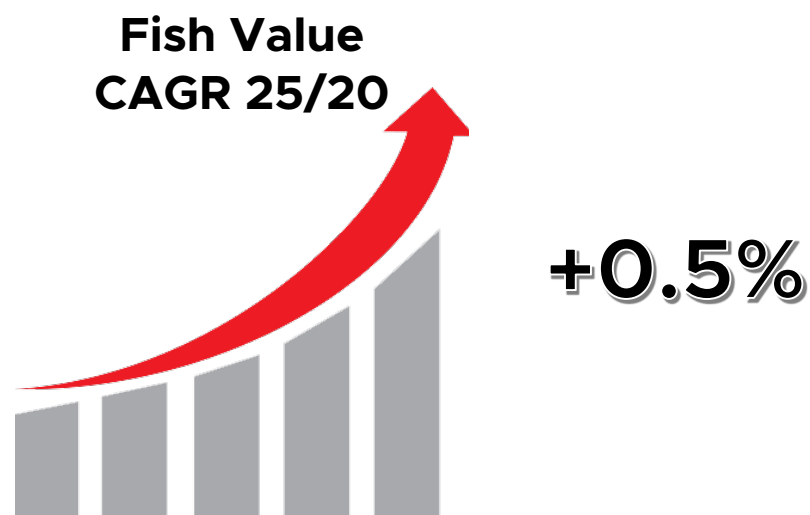
Fish Processing

Fish Volume by categories (mln Kg)

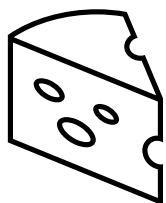
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	76.2	80.8	88.5	181.9	203.6	27%	27.9%
Frozen	62.6	56.7	74.3	84.0	87.6	12%	8.7%
Processed	370.2	368.7	394.7	432.1	449.9	61%	5.0%
Total	509.0	506.2	557.5	698.0	741.1	100%	9.8%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	407.0	496.0	543.9	994.0	1,142.9	31%	29.4%
Frozen	190.6	333.4	355.1	376.0	449.1	12%	23.9%
Processed	1,610.4	1,708.2	1,825.9	2,024.7	2,147.9	57%	7.5%
Total	2,208.0	2,537.5	2,724.9	3,394.6	3,739.8	100%	14.1%



Source: elaboration on data Eurostat



POLAND

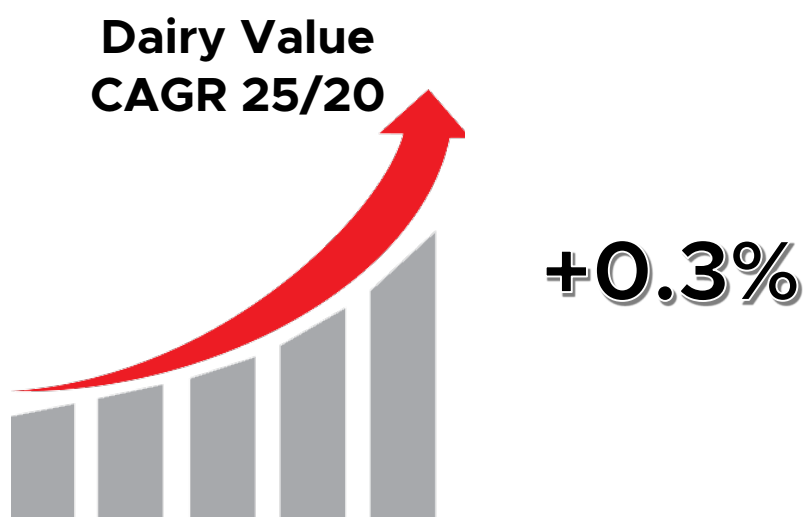
Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	771.3	795.0	914.8	943.5	954.8	79%	5.5%
Butter	181.4	198.9	213.3	232.3	250.3	21%	8.4%
Total	952.7	993.9	1,128.1	1,175.8	1,205.0	100%	6.1%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	1,813.1	2,141.4	2,454.8	2,567.2	2,594.4	73%	9.4%
Butter	563.1	973.3	1,060.7	983.4	947.8	27%	13.9%
Total	2,376.2	3,114.7	3,515.5	3,550.6	3,542.3	100%	10.5%



Source: elaboration on data Eurostat



POLAND

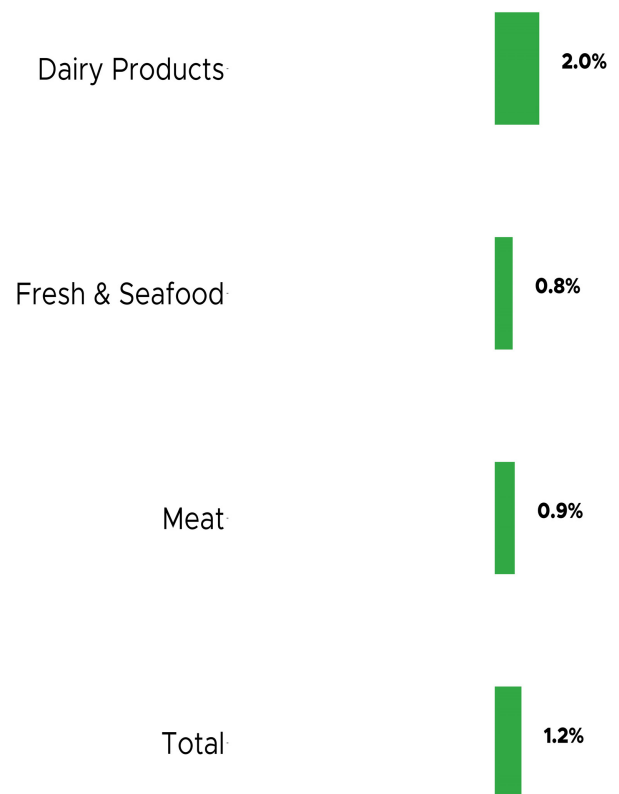
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	619.1	689.4	760.3	807.5	3.6%	2.0%
Fresh & Seafood	196.1	201.0	222.6	227.9	0.8%	0.8%
Meat	1,860.3	1,980.1	2,195.4	2,257.9	2.1%	0.9%
Total	2,675.5	2,870.4	3,178.3	3,293.2	2.4%	1.2%

Volume 2020



Volume CAGR 23/20 (%)





POLAND

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	47.5	43.2	46.7	46.1	-3.1%	-0.4%
Cheese	571.7	646.2	713.6	761.4	4.2%	2.2%
Fresh Fish	93.1	96.8	107.7	111.2	1.3%	1.1%
Fresh Seafood	12.2	12.5	13.9	14.2	0.9%	0.7%
Processed Fish & Seafood	90.8	91.7	101.1	102.4	0.3%	0.4%
Fresh Meat	878.7	989.8	1,118.0	1,212.4	4.0%	2.7%
Processed Meat	981.6	990.3	1,077.4	1,045.5	0.3%	-1.0%





POLAND

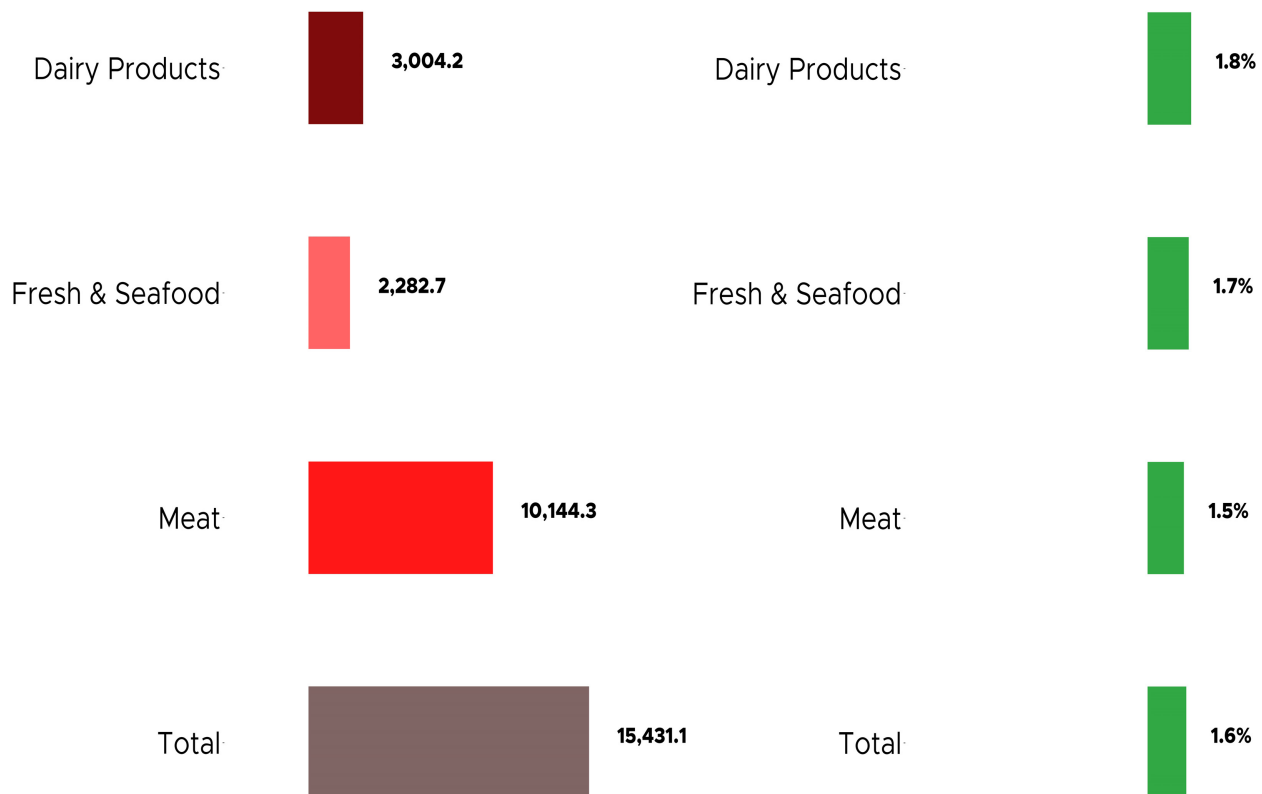


Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	2,527.9	2,724.2	3,004.2	3,166.4	2.5%	1.8%
Fresh & Seafood	1,882.9	2,041.2	2,282.7	2,403.5	2.7%	1.7%
Meat	8,439.7	9,093.2	10,144.3	10,610.7	2.5%	1.5%
Total	12,850.5	13,858.6	15,431.1	16,180.6	2.5%	1.6%

Revenues 2020

Volume CAGR 23/20 (%)





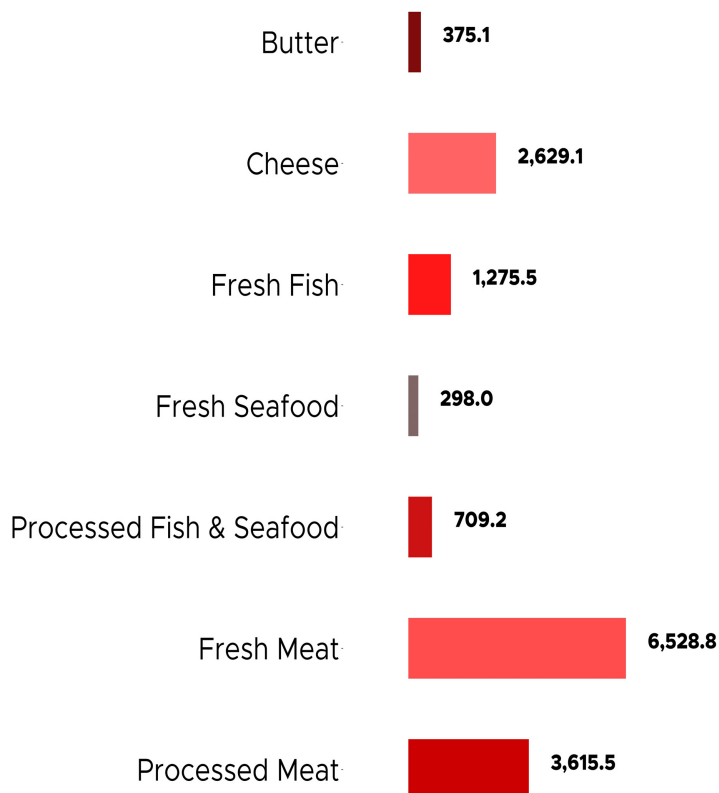
POLAND



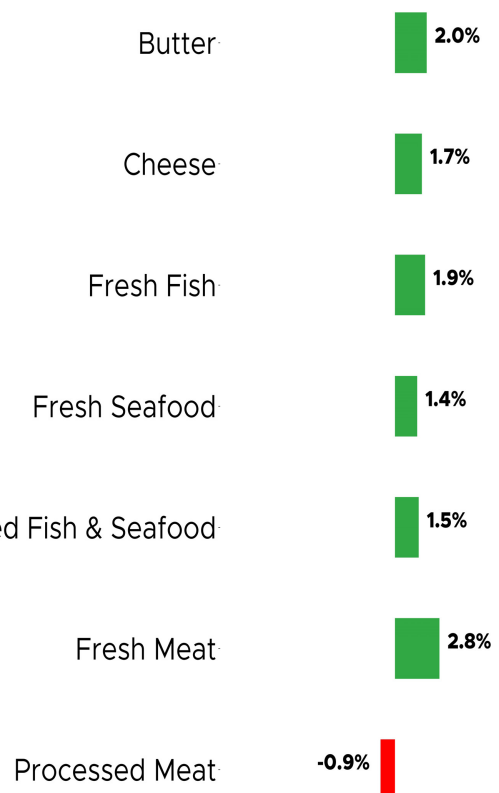
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	312.3	339.2	375.1	398.4	2.8%	2.0%
Cheese	2,215.6	2,385.0	2,629.1	2,768.0	2.5%	1.7%
Fresh Fish	1,045.1	1,138.7	1,275.5	1,349.8	2.9%	1.9%
Fresh Seafood	248.6	267.2	298.0	311.1	2.4%	1.4%
Processed Fish & Seafood	589.3	635.3	709.2	742.6	2.5%	1.5%
Fresh Meat	5,153.4	5,775.6	6,528.8	7,092.8	3.9%	2.8%
Processed Meat	3,286.2	3,317.6	3,615.5	3,517.8	0.3%	-0.9%

Revenues 2020



Revenue CAGR 23/20 (%)



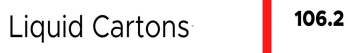


POLAND

Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	2,496.8	2,662.3	2,809.0	3,079.3	2.2%	3.1%
Glass	21.6	24.7	26.2	30.8	4.6%	5.5%
Liquid Cartons	87.2	99.6	106.2	121.1	4.5%	4.5%
Metal	19.0	20.1	20.8	22.0	1.8%	1.9%
Paper-based Containers	187.2	211.1	225.7	259.7	4.1%	4.8%
Rigid Plastic	2,364.7	2,596.7	2,704.3	2,987.2	3.2%	3.4%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



PORTUGAL



Consumers
10,305,564

CAGR 15/20

-0.1%

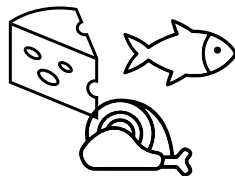


Gdp per capita
19.074 €

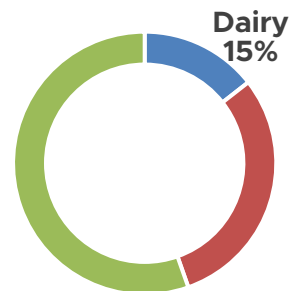
CAGR 15/20

+3.1%

Fresh food processing



Meat
55%

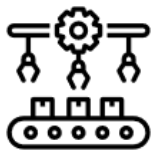


Fish
30%



Most growing category 16/20

Fish +6.13% per year



Food processing & packaging machinery market

72,7 mln €

Packaging type

Most consumed

Rigid Plastic
56.3%



Most growing 20/23

Flexible Packaging
18.4 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



PORTUGAL

Meat Processing

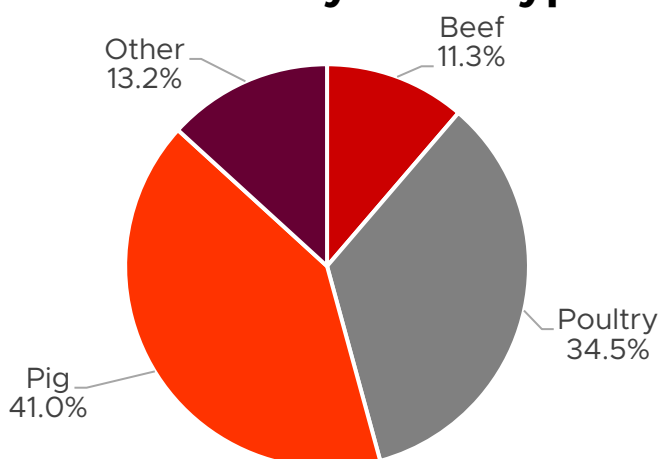
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	655.7	644.5	642.8	681.9	684.3	72%	1.07%
Processed+Sausage	180.6	181.2	176.1	175.4	153.8	16%	-3.93%
Frozen	50.0	43.6	50.2	39.8	40.8	4%	-4.94%
Others	90.0	94.8	84.9	99.6	75.7	8%	-4.23%
Total	976.2	964.2	954.0	996.6	954.6	100%	-0.56%

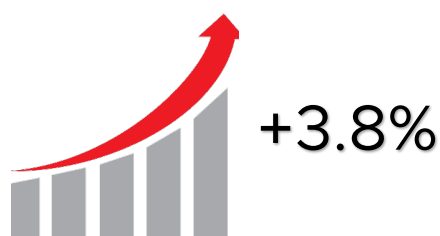
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	1,405.7	1,474.6	1,445.6	1,590.0	1,578.5	66%	2.94%
Processed+Sausage	608.3	626.9	661.8	680.6	625.0	26%	0.68%
Frozen	96.7	82.3	90.1	76.7	74.1	3%	-6.46%
Others	108.8	119.0	117.9	122.7	111.9	5%	0.69%
Total	2,219.6	2,302.8	2,315.5	2,470.0	2,389.4	100%	1.86%

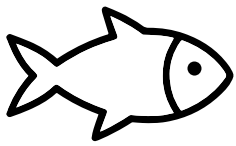
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



PORTUGAL

Fish Processing

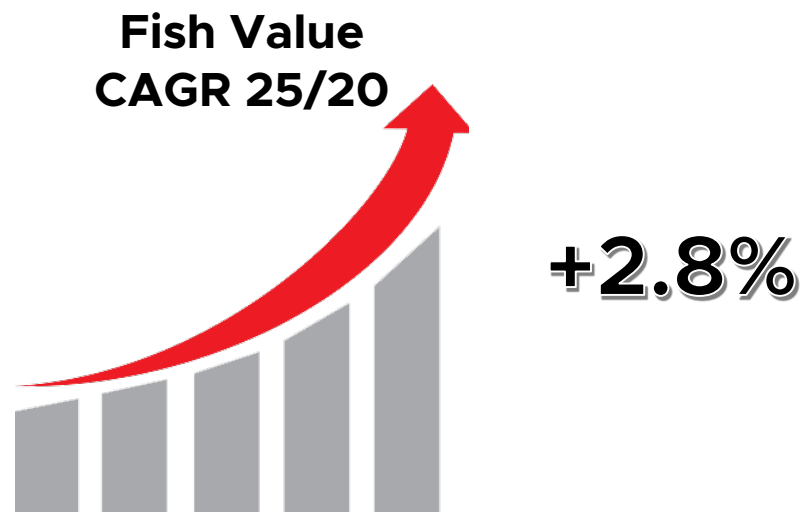


Fish Volume by categories (mln Kg)

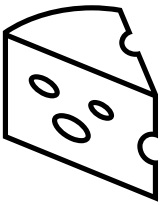
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	2.6	5.6	4.8	12.2	14.8	6%	55.1%
Frozen	94.7	90.1	97.2	108.3	102.1	38%	1.9%
Processed	129.9	130.1	135.6	139.3	151.1	56%	3.8%
Total	227.2	225.7	237.6	259.9	268.0	100%	4.2%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	12.3	26.6	26.5	64.9	61.0	5%	49.3%
Frozen	375.4	387.5	417.1	475.9	417.2	32%	2.7%
Processed	638.5	663.7	700.3	769.0	823.5	63%	6.6%
Total	1,026.2	1,077.8	1,143.8	1,309.8	1,301.7	100%	6.1%



Source: elaboration on data Eurostat



PORTUGAL

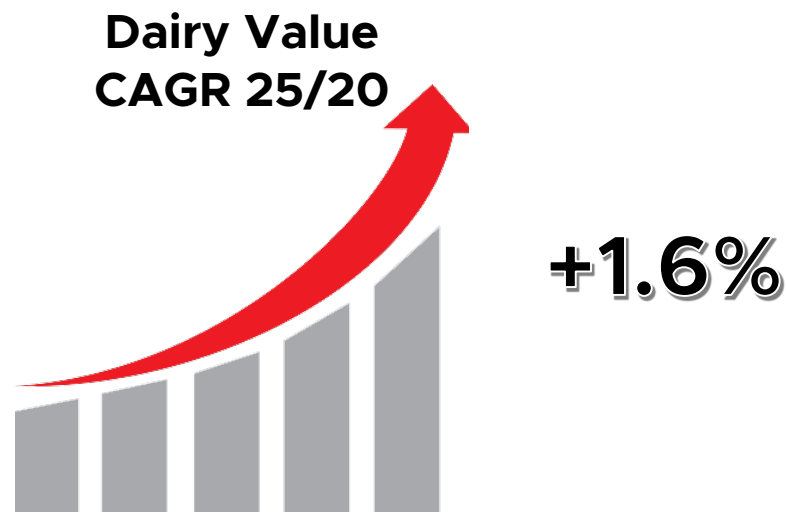
Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	82.8	88.9	87.7	97.7	102.7	77%	5.5%
Butter	31.5	29.6	29.2	30.7	31.0	23%	-0.4%
Total	114.3	118.5	116.9	128.5	133.7	100%	4.0%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	406.9	432.3	441.4	490.0	496.5	80%	5.1%
Butter	106.3	130.9	135.1	133.0	126.6	20%	4.5%
Total	513.2	563.1	576.5	623.0	623.1	100%	5.0%



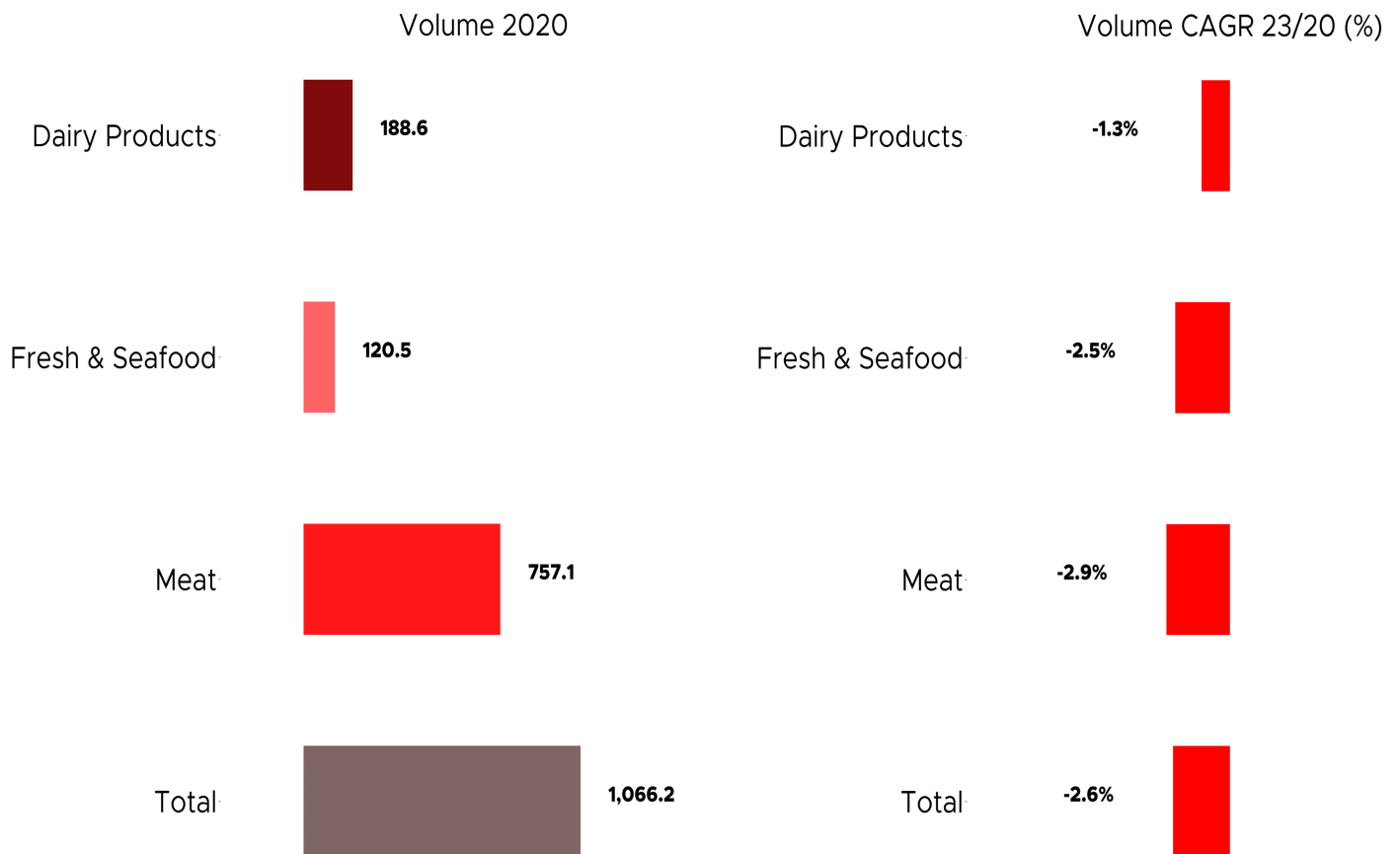
Source: elaboration on data Eurostat



PORTUGAL

Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	158.2	168.8	188.6	181.2	2.2%	-1.3%
Fresh & Seafood	102.2	105.5	120.5	111.6	1.0%	-2.5%
Meat	652.4	664.7	757.1	692.9	0.6%	-2.9%
Total	912.8	939.0	1,066.2	985.7	0.9%	-2.6%

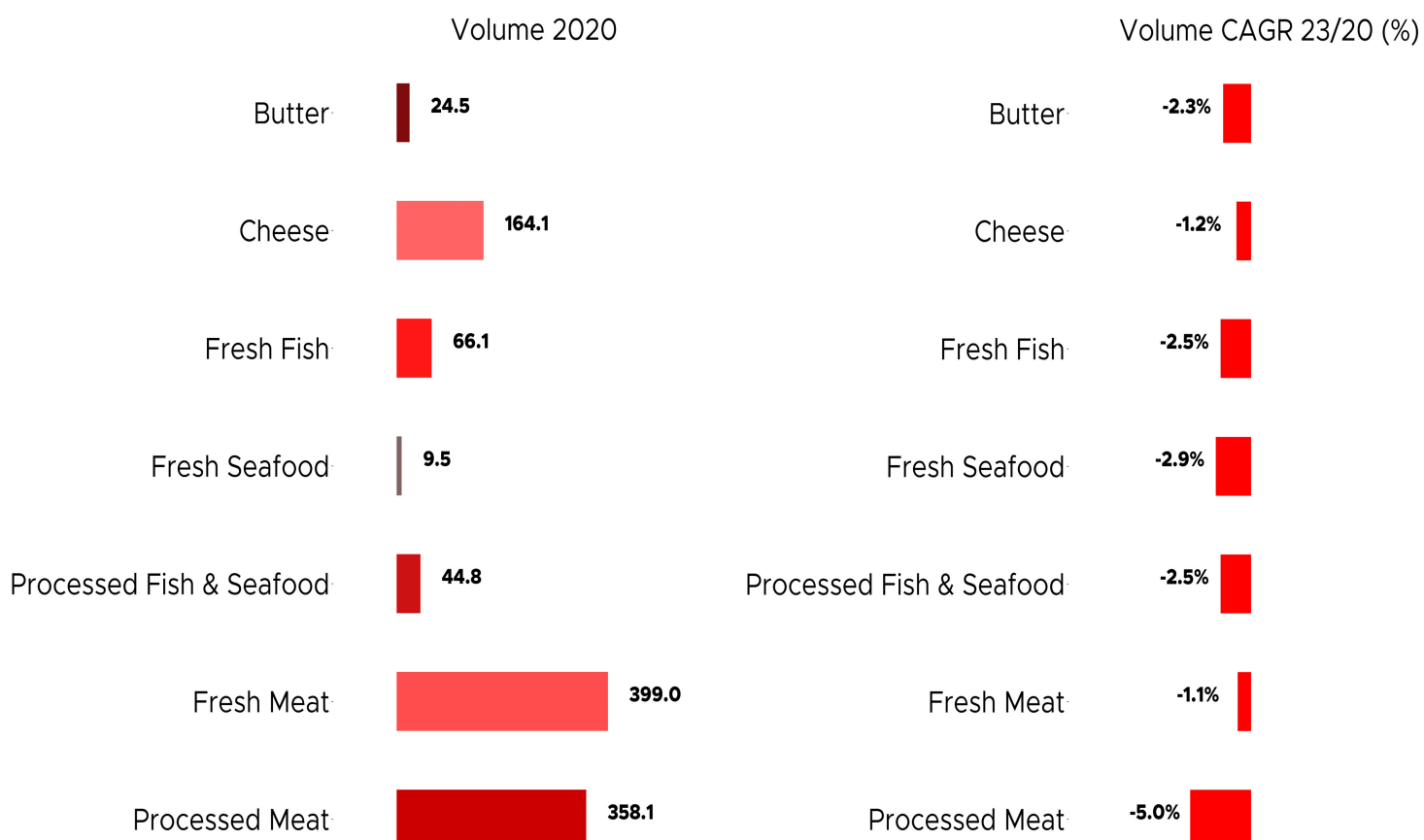




PORTUGAL

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	22.6	22.0	24.5	22.8	-0.9%	-2.3%
Cheese	135.6	146.8	164.1	158.3	2.7%	-1.2%
Fresh Fish	56.3	57.8	66.1	61.3	0.9%	-2.5%
Fresh Seafood	8.2	8.4	9.5	8.7	0.5%	-2.9%
Processed Fish & Seafood	37.7	39.3	44.8	41.5	1.4%	-2.5%
Fresh Meat	319.2	343.5	399.0	385.9	2.5%	-1.1%
Processed Meat	333.2	321.2	358.1	307.1	-1.2%	-5.0%



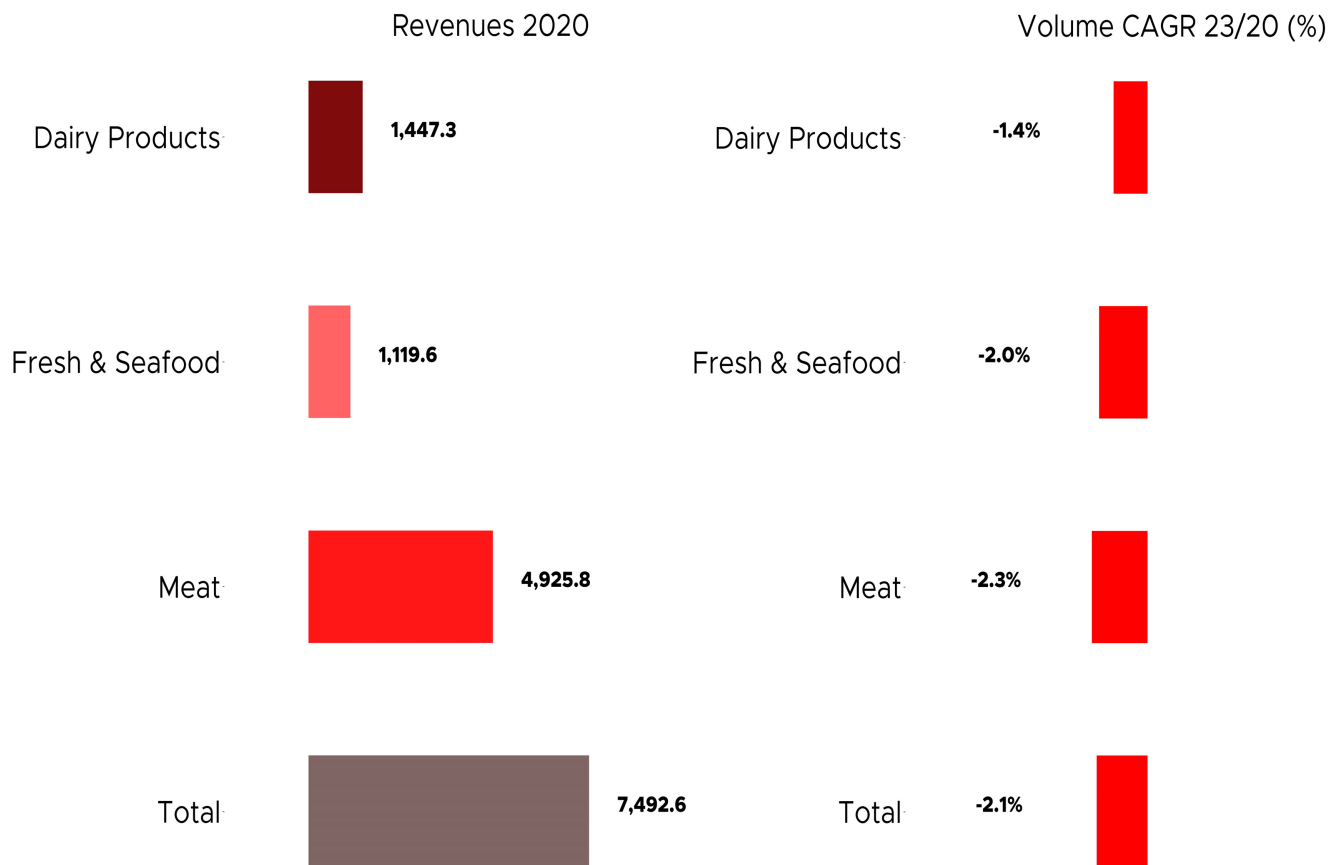


PORTUGAL



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	1,230.1	1,296.5	1,447.3	1,387.0	1.8%	-1.4%
Fresh & Seafood	917.7	974.8	1,119.6	1,053.8	2.0%	-2.0%
Meat	4,079.9	4,299.5	4,925.8	4,598.8	1.8%	-2.3%
Total	6,227.7	6,570.7	7,492.6	7,039.6	1.8%	-2.1%





PORTUGAL

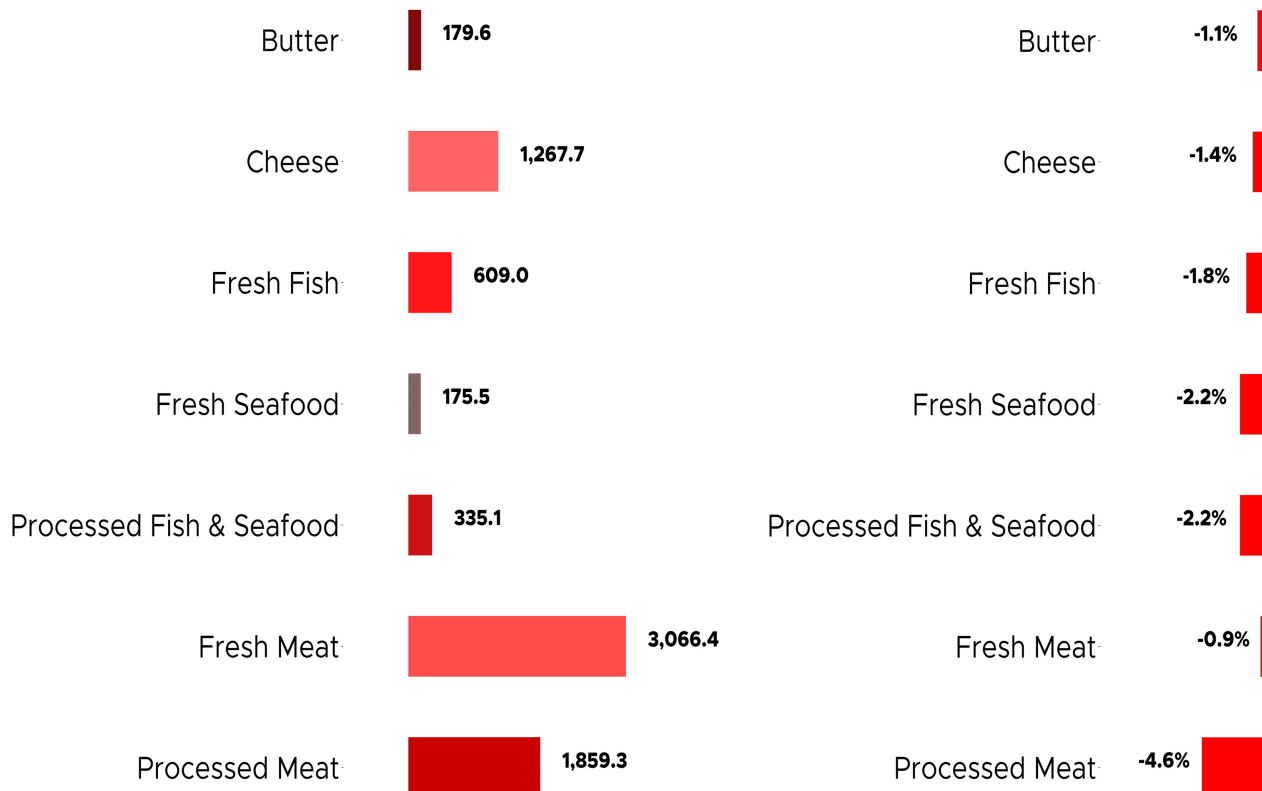


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	150.9	160.4	179.6	173.6	2.1%	-1.1%
Cheese	1,079.2	1,136.0	1,267.7	1,213.5	1.7%	-1.4%
Fresh Fish	495.5	529.2	609.0	576.4	2.2%	-1.8%
Fresh Seafood	145.1	153.1	175.5	164.1	1.8%	-2.2%
Processed Fish & Seafood	277.1	292.4	335.1	313.3	1.8%	-2.2%
Fresh Meat	2,397.5	2,639.3	3,066.4	2,984.2	3.3%	-0.9%
Processed Meat	1,682.3	1,660.1	1,859.3	1,614.7	-0.4%	-4.6%

Revenues 2020

Revenue CAGR 23/20 (%)



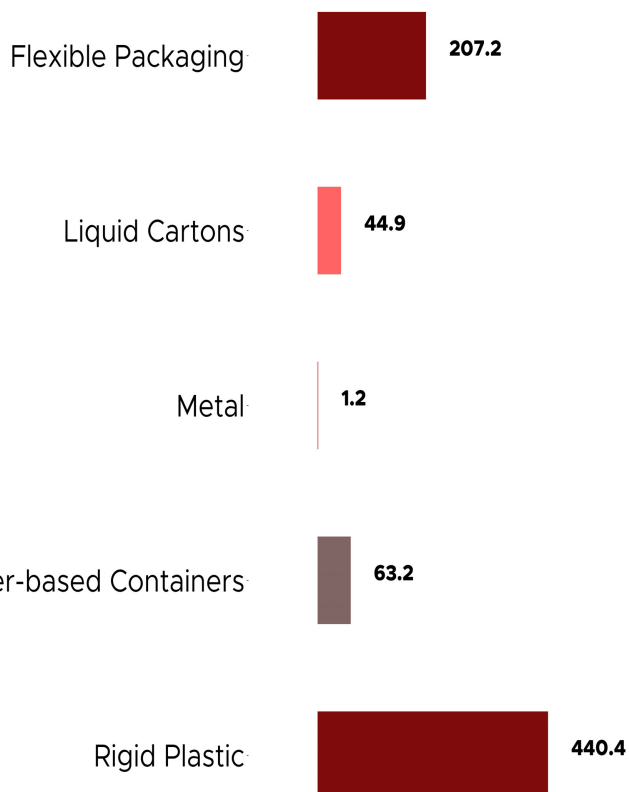


PORTUGAL

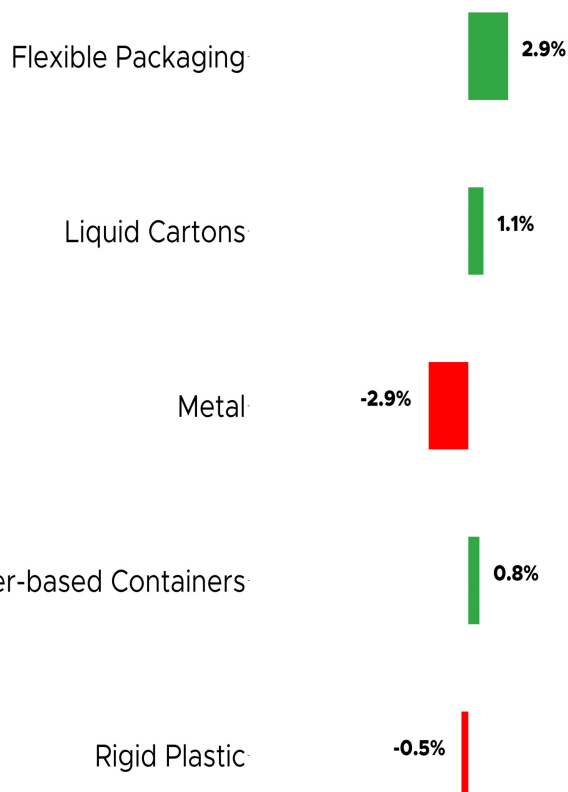
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	174.8	193.9	207.2	225.6	3.5%	2.9%
Liquid Cartons	39.4	42.7	44.9	46.4	2.7%	1.1%
Metal	1.3	1.2	1.2	1.1	-1.4%	-2.9%
Paper-based Containers	56.5	59.8	63.2	64.6	1.9%	0.8%
Rigid Plastic	426.7	427.2	440.4	434.4	0.0%	-0.5%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



ROMANIA



Consumers

19,286,123

CAGR 15/20

-0.5%



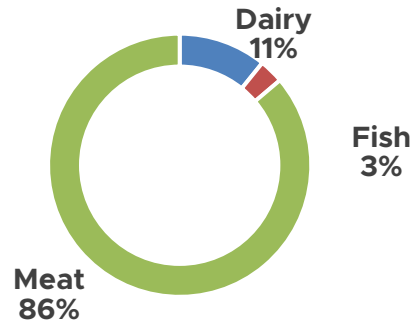
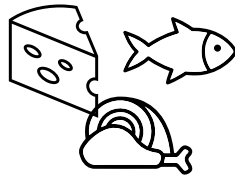
Gdp per capita

10.962 €

CAGR 15/20

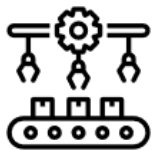
+7.5%

Fresh food processing



Most growing category 16/20

Fish +11.88% per year



Food processing & packaging machinery market

96,1 mln €

Packaging type

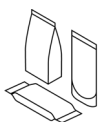
Most consumed

Flexible
Packaging 60.7%



Most growing 20/23

Flexible Packaging
+47.9 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



ROMANIA

Meat Processing

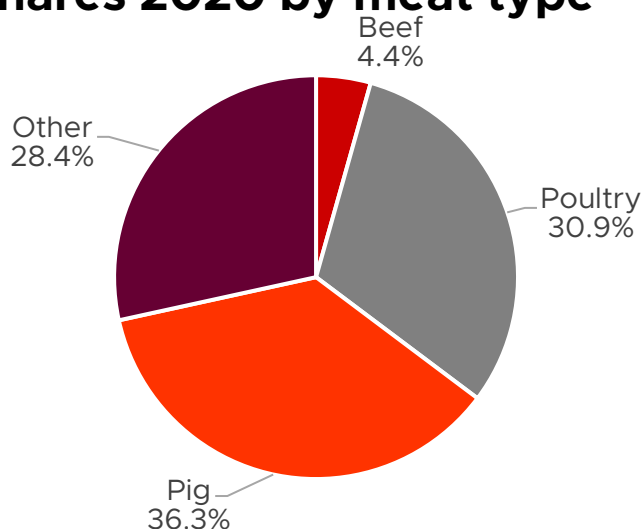
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	645.9	663.8	661.3	674.3	649.4	50%	0.14%
Processed+Sausage	401.7	410.6	433.3	442.8	412.5	32%	0.66%
Frozen	156.5	163.0	175.7	197.7	183.3	14%	4.03%
Others	38.3	41.5	54.6	54.2	52.5	4%	8.20%
Total	1,242.4	1,278.8	1,324.9	1,369.1	1,297.8	100%	1.10%

Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	1,231.4	1,345.2	1,315.7	1,434.4	1,364.6	45%	2.60%
Processed+Sausage	1,059.7	1,144.9	1,209.2	1,327.1	1,318.3	43%	5.61%
Frozen	256.3	272.0	301.8	311.2	293.2	10%	3.42%
Others	47.5	63.0	68.7	76.1	72.1	2%	10.98%
Total	2,594.9	2,825.0	2,895.4	3,148.9	3,048.2	100%	4.11%

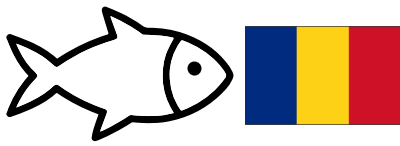
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



ROMANIA

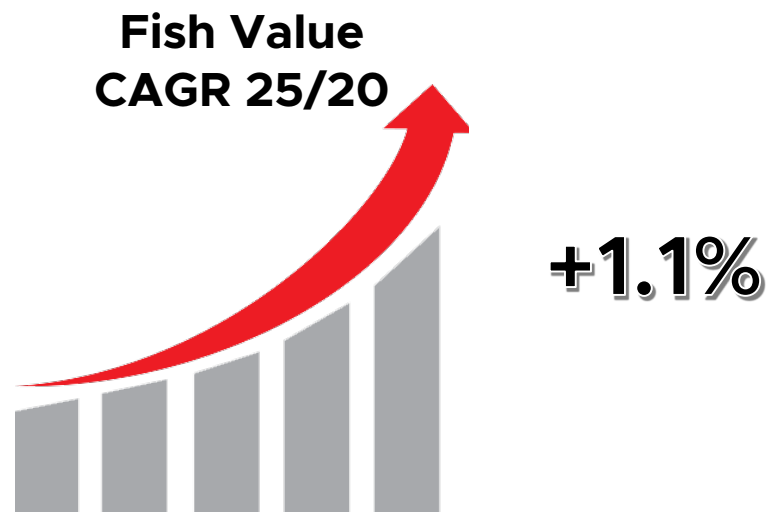
Fish Processing

Fish Volume by categories (mln Kg)

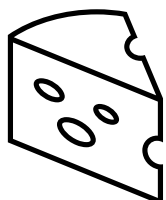
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	0.0	0.0	0.0	0.2	1%	n.a.
Frozen	5.1	6.5	6.5	6.5	6.5	29%	5.9%
Processed	15.0	15.5	16.3	17.7	15.7	70%	1.1%
Total	20.1	21.9	22.8	24.2	22.4	100%	2.6%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	0.0	0.0	0.7	0.6	1.6	2%	n.a.
Frozen	7.6	10.3	10.3	10.3	10.3	10%	7.9%
Processed	59.9	67.5	73.5	86.4	93.9	89%	11.9%
Total	67.6	77.8	84.5	97.3	105.9	100%	11.9%



Source: elaboration on data Eurostat



ROMANIA

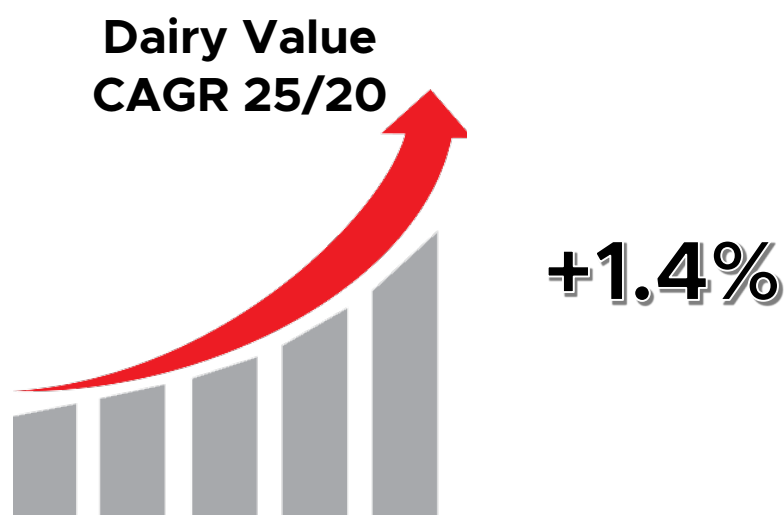
Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	83.9	86.3	91.5	96.4	95.0	92%	3.1%
Butter	11.4	11.6	10.1	9.7	8.3	8%	-7.6%
Total	95.4	97.9	101.6	106.1	103.3	100%	2.0%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	267.8	285.5	301.4	311.0	324.6	85%	4.9%
Butter	51.2	61.4	62.6	59.5	57.7	15%	3.0%
Total	319.0	346.9	364.0	370.4	382.3	100%	4.6%



Source: elaboration on data Eurostat



ROMANIA

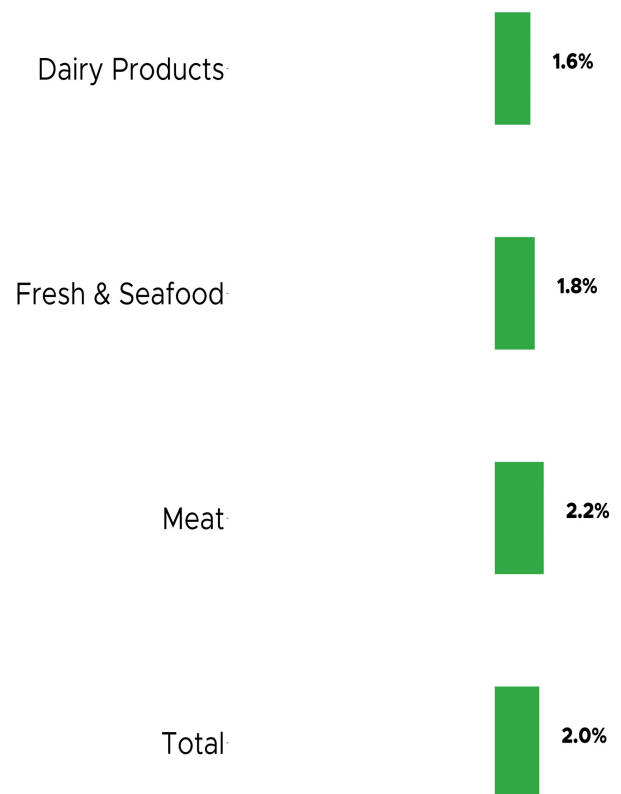
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	324.2	367.6	404.3	423.6	4.3%	1.6%
Fresh & Seafood	129.2	150.6	169.3	178.4	5.3%	1.8%
Meat	1,101.2	1,338.1	1,507.0	1,607.3	6.7%	2.2%
Total	1,554.6	1,856.3	2,080.6	2,209.3	6.1%	2.0%

Volume 2020



Volume CAGR 23/20 (%)





ROMANIA

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	28.6	30.6	33.7	34.8	2.3%	1.1%
Cheese	295.6	337.0	370.6	388.7	4.5%	1.6%
Fresh Fish	52.5	61.8	69.6	74.1	5.6%	2.1%
Fresh Seafood	6.3	7.5	8.4	8.9	5.5%	2.1%
Processed Fish & Seafood	70.4	81.4	91.2	95.4	5.0%	1.5%
Fresh Meat	507.6	670.2	772.1	878.5	9.7%	4.4%
Processed Meat	593.6	667.9	735.0	728.8	4.0%	-0.3%



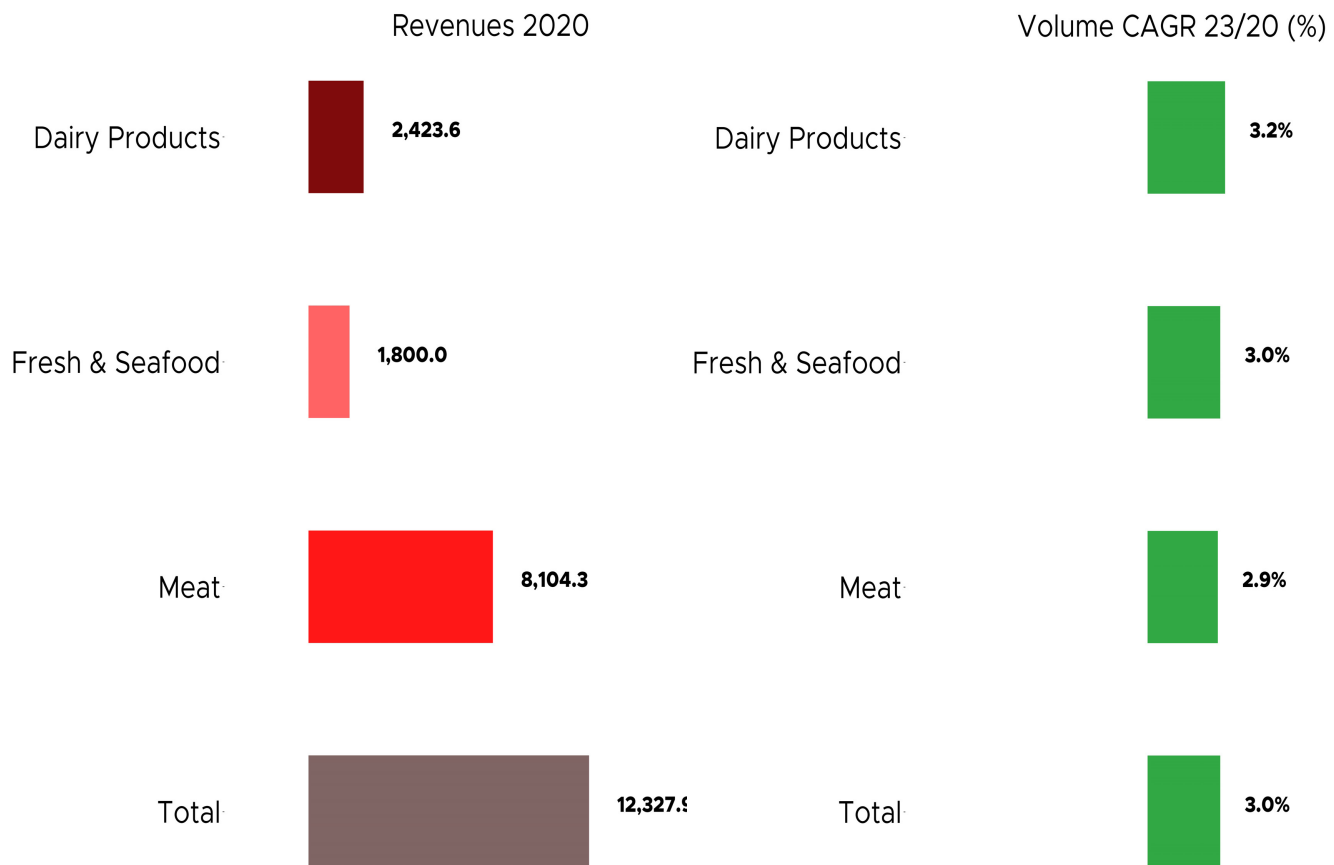


ROMANIA



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	1,740.1	2,165.5	2,423.6	2,661.4	7.6%	3.2%
Fresh & Seafood	1,266.1	1,582.6	1,800.0	1,968.8	7.7%	3.0%
Meat	5,731.7	7,134.0	8,104.3	8,828.6	7.6%	2.9%
Total	8,738.0	10,882.1	12,327.9	13,458.8	7.6%	3.0%





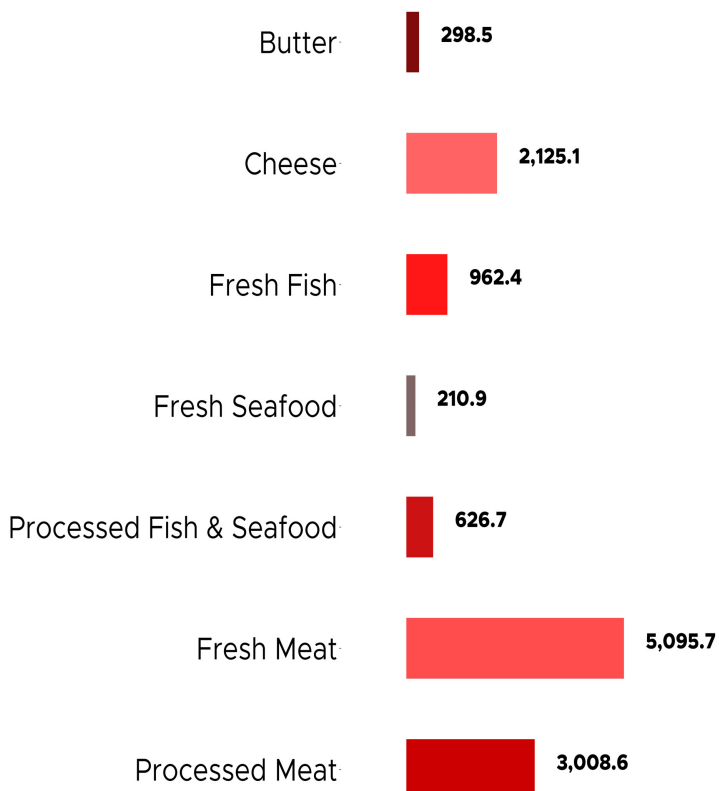
ROMANIA



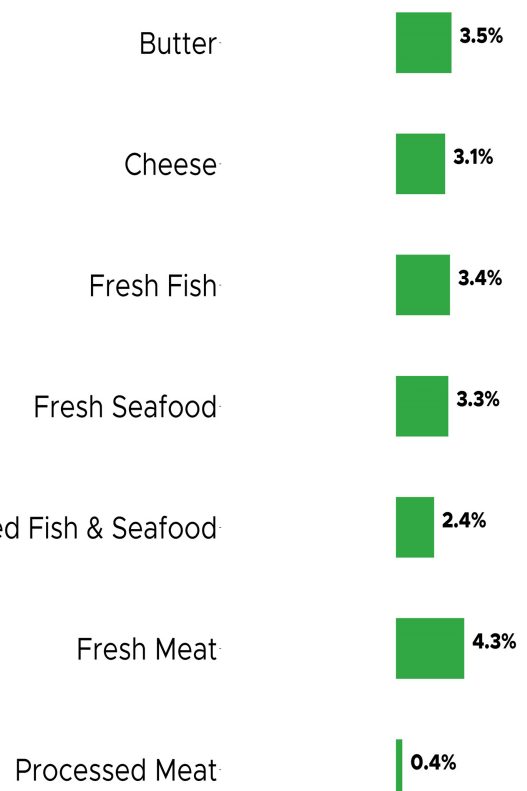
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	211.7	265.9	298.5	330.8	7.9%	3.5%
Cheese	1,528.4	1,899.6	2,125.1	2,330.7	7.5%	3.1%
Fresh Fish	668.0	843.3	962.4	1,063.1	8.1%	3.4%
Fresh Seafood	146.6	184.9	210.9	232.8	8.1%	3.3%
Processed Fish & Seafood	451.6	554.4	626.7	672.9	7.1%	2.4%
Fresh Meat	3,403.5	4,424.0	5,095.7	5,782.5	9.1%	4.3%
Processed Meat	2,328.2	2,710.0	3,008.6	3,046.1	5.2%	0.4%

Revenues 2020



Revenue CAGR 23/20 (%)



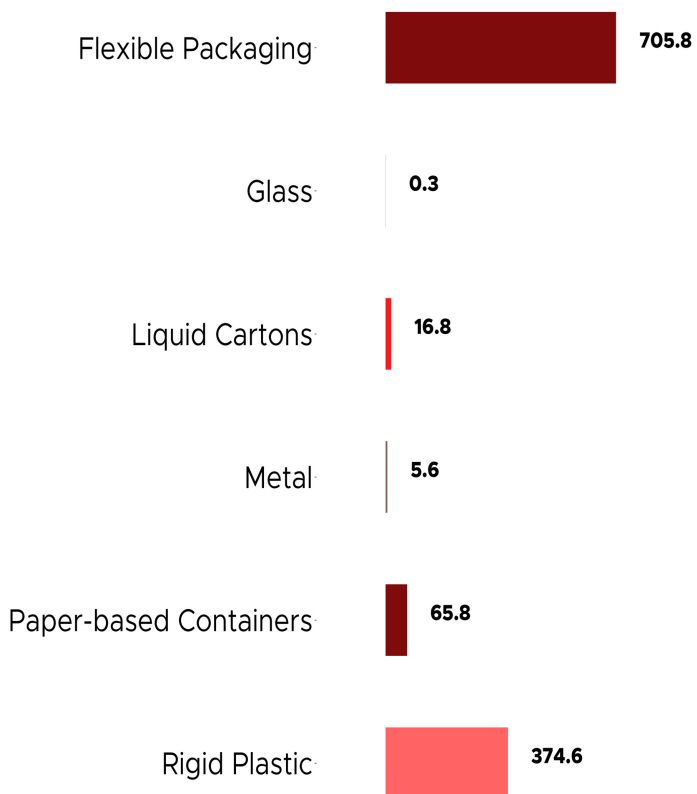


ROMANIA

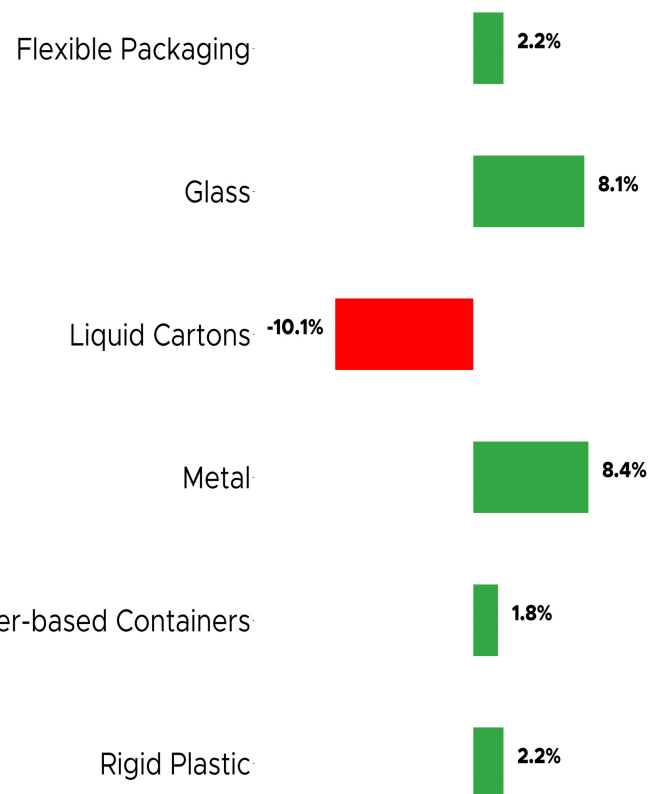
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	619.6	680.4	705.8	753.7	3.2%	2.2%
Glass	0.2	0.3	0.3	0.4	11.0%	8.1%
Liquid Cartons	36.5	18.5	16.8	12.2	-20.3%	-10.1%
Metal	3.7	5.0	5.6	7.2	11.4%	8.4%
Paper-based Containers	58.1	64.3	65.8	69.5	3.4%	1.8%
Rigid Plastic	324.1	363.7	374.6	399.6	3.9%	2.2%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



SERBIA



Consumers
6,908,224

CAGR 15/20

-0.5%

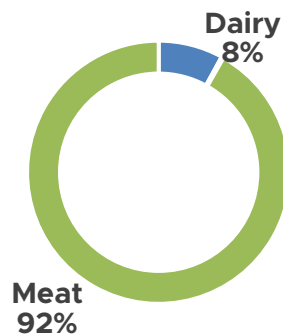
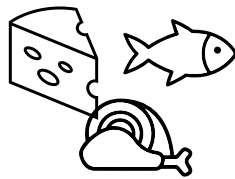


Gdp per capita
6.516 €

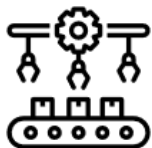
CAGR 15/20

+6.5%

Fresh food processing



Most growing category 16/20
Meat +33.81% per year



Food processing & packaging machinery market
41,3 mln €

Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



SERBIA

Meat Processing

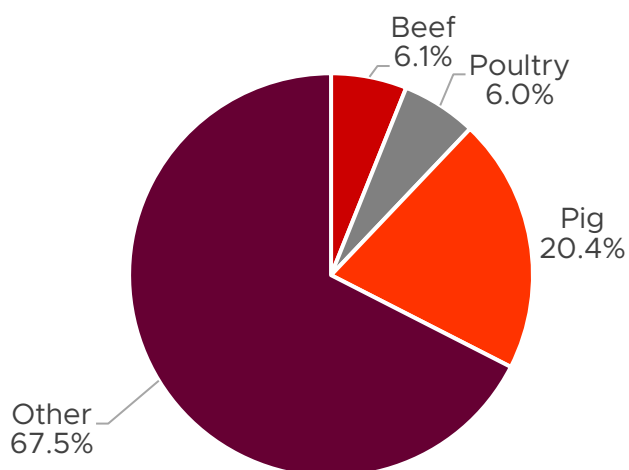
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	88.7	101.9	123.7	128.3	138.3	16%	11.74%
Processed+Sausage	102.6	111.0	108.5	116.2	120.3	14%	4.06%
Frozen	2.0	3.9	7.0	12.3	9.3	1%	46.79%
Others	13.4	19.3	18.9	37.6	594.0	69%	157.92%
Total	206.7	236.2	258.0	294.3	861.8	100%	42.89%

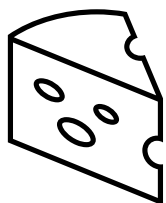
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	210.1	281.7	275.8	317.9	349.4	21%	13.55%
Processed+Sausage	282.4	330.8	322.6	350.6	374.8	23%	7.33%
Frozen	2.9	7.8	10.1	15.8	14.3	1%	49.10%
Others	14.3	24.5	23.4	33.0	895.7	55%	181.36%
Total	509.7	644.8	631.8	717.4	1,634.1	100%	33.81%

Shares 2020 by meat type



Source: elaboration on data Eurostat



SERBIA

Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	35.6	32.5	52.4	46.0	44.6	83%	5.8%
Butter	5.6	7.3	9.2	9.3	9.0	17%	12.8%
Total	41.2	39.8	61.6	55.3	53.7	100%	6.8%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	94.7	87.2	126.5	124.4	110.5	78%	3.9%
Butter	20.1	27.7	33.0	31.7	31.1	22%	11.5%
Total	114.9	114.9	159.5	156.1	141.6	100%	5.4%

Source: elaboration on data Eurostat



SERBIA

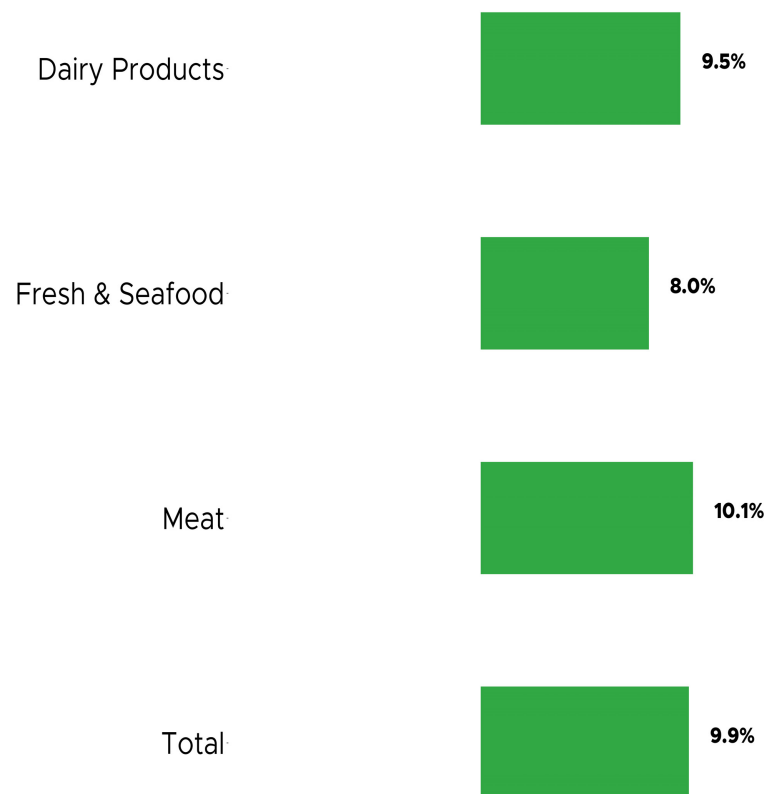
Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	47.7	50.0	53.7	70.6	1.6%	9.5%
Fresh & Seafood	21.5	20.8	22.5	28.3	-1.0%	8.0%
Meat	224.3	241.0	266.2	355.3	2.4%	10.1%
Total	293.5	311.8	342.4	454.1	2.0%	9.9%

Volume 2020



Volume CAGR 23/20 (%)

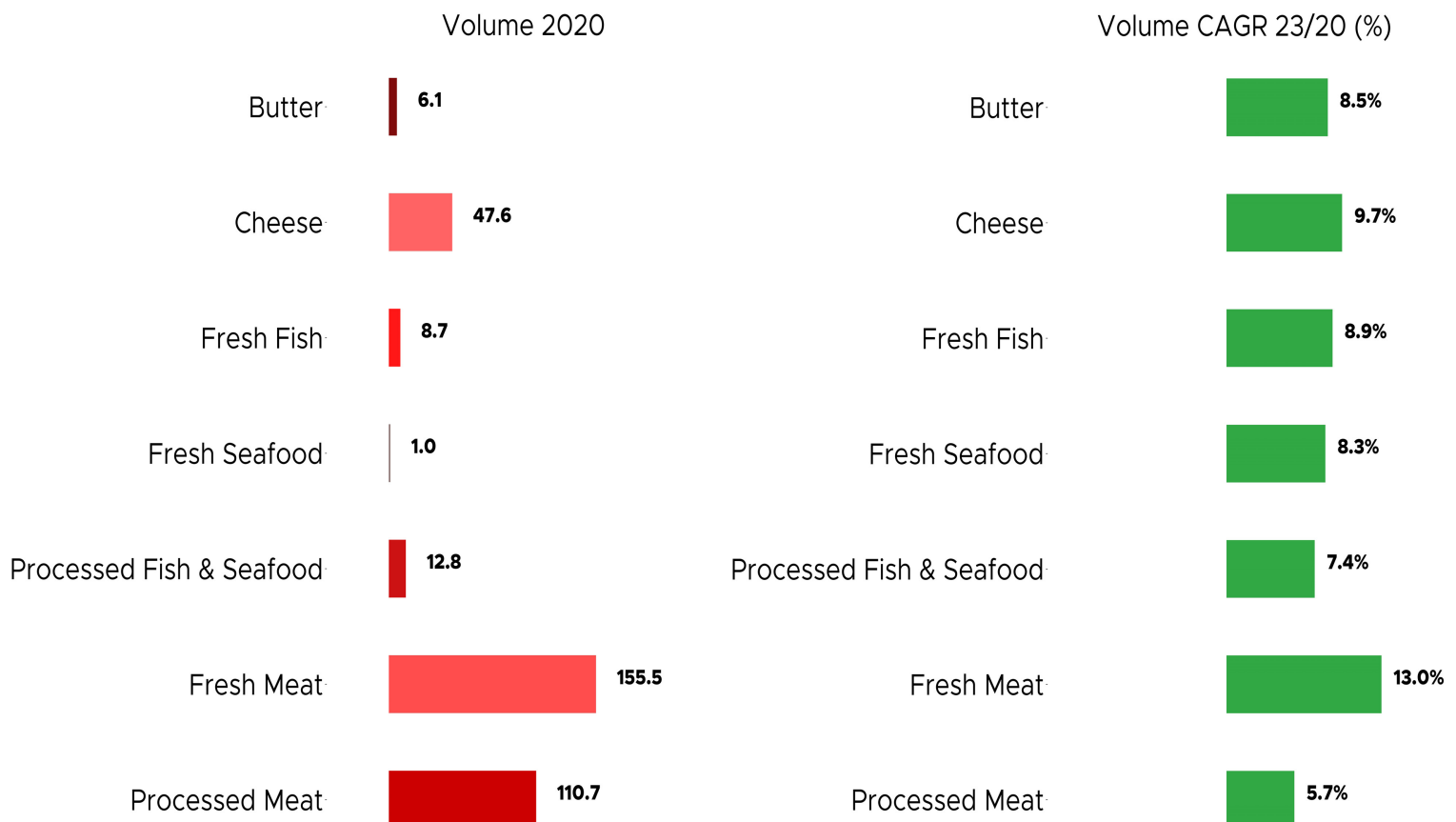




SERBIA

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	5.8	5.7	6.1	7.8	-0.7%	8.5%
Cheese	41.9	44.3	47.6	62.8	1.9%	9.7%
Fresh Fish	8.0	7.9	8.7	11.2	-0.3%	8.9%
Fresh Seafood	1.0	0.9	1.0	1.3	-0.7%	8.3%
Processed Fish & Seafood	12.5	11.9	12.8	15.8	-1.5%	7.4%
Fresh Meat	115.2	137.8	155.5	224.5	6.1%	13.0%
Processed Meat	109.1	103.3	110.7	130.7	-1.8%	5.7%





SERBIA



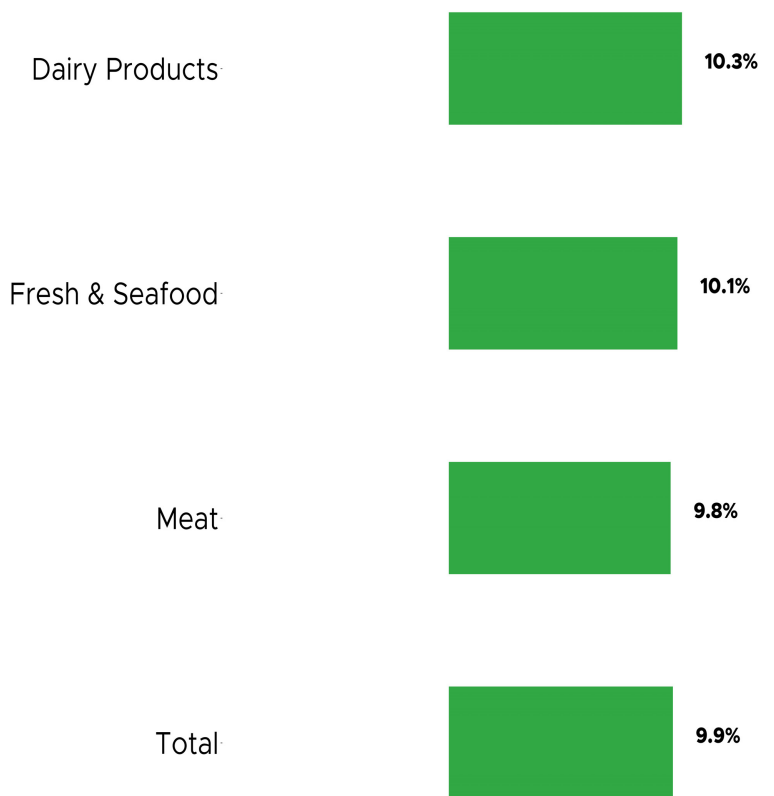
Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	361.9	393.4	425.9	571.0	2.8%	10.3%
Fresh & Seafood	256.4	280.0	308.4	411.7	3.0%	10.1%
Meat	1,189.2	1,290.7	1,426.7	1,887.6	2.8%	9.8%
Total	1,807.6	1,964.2	2,161.0	2,870.3	2.8%	9.9%

Revenues 2020



Volume CAGR 23/20 (%)





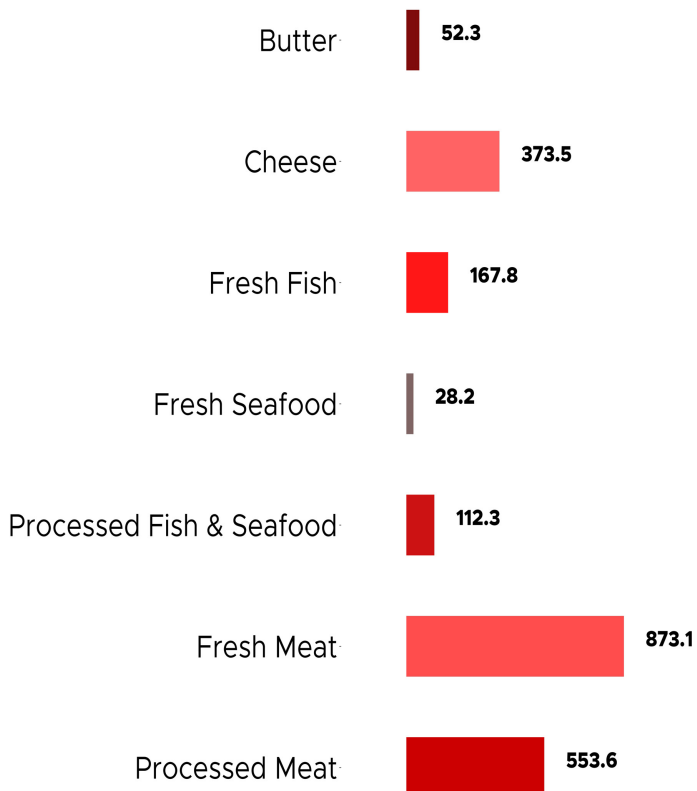
SERBIA



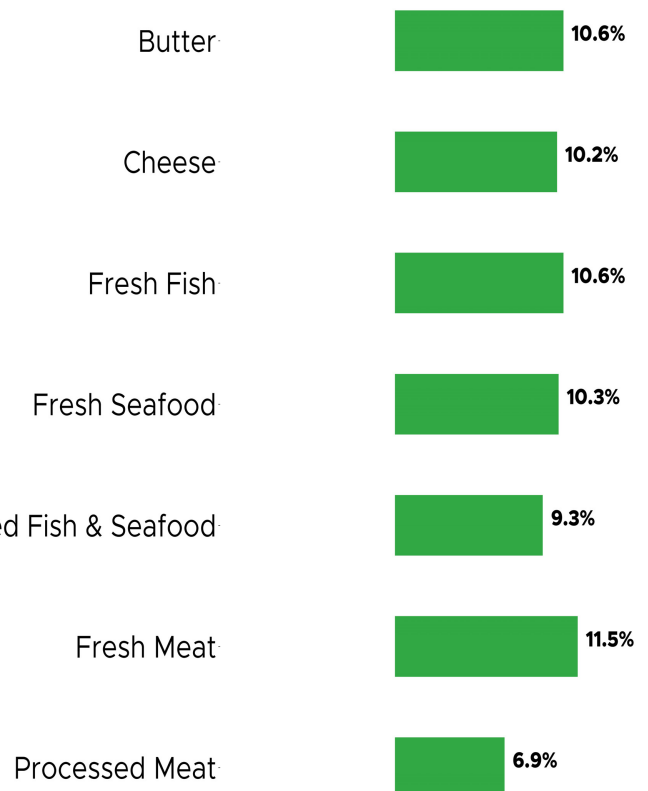
Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	44.0	48.2	52.3	70.8	3.1%	10.6%
Cheese	318.0	345.2	373.5	500.3	2.8%	10.2%
Fresh Fish	137.1	151.7	167.8	227.1	3.4%	10.6%
Fresh Seafood	23.3	25.6	28.2	37.9	3.2%	10.3%
Processed Fish & Seafood	96.0	102.7	112.3	146.8	2.3%	9.3%
Fresh Meat	687.1	782.2	873.1	1,211.8	4.4%	11.5%
Processed Meat	502.1	508.5	553.6	675.7	0.4%	6.9%

Revenues 2020



Revenue CAGR 23/20 (%)



SLOVENIA



Consumers

2,100,126

CAGR 15/20

+0.4%



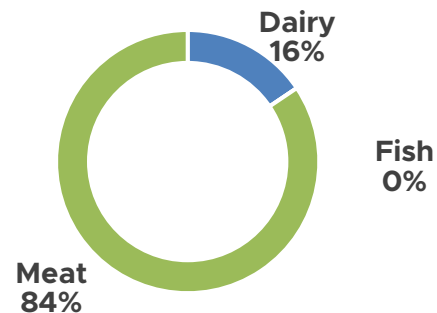
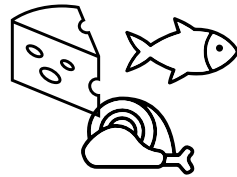
Gdp per capita

21.403 €

CAGR 15/20

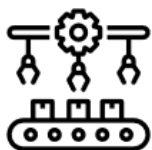
+3.8%

Fresh food processing



Most growing category 16/20

Meat +4.35% per year



Food processing & packaging machinery market

35,1 mln €

Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



SLOVENIA

Meat Processing



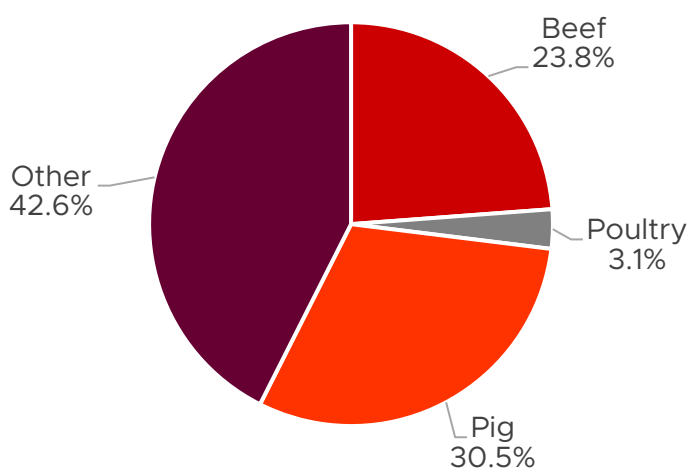
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	48.5	50.8	46.4	43.7	41.2	39%	-4.01%
Processed+Sausage	50.7	53.1	52.1	50.8	53.4	51%	1.30%
Frozen	0.1	0.1	0.6	7.0	7.0	7%	222.92%
Others	3.6	3.8	3.7	3.6	3.0	3%	-4.18%
Total	102.9	107.7	102.7	105.2	104.6	100%	0.42%

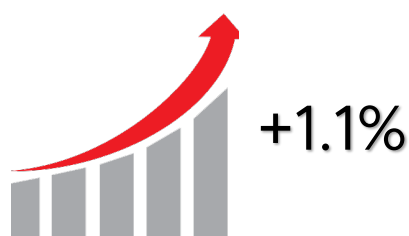
Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	157.5	183.1	165.1	168.9	164.2	41%	1.06%
Processed+Sausage	174.4	193.5	203.2	203.1	215.5	54%	5.44%
Frozen	0.2	0.2	0.3	12.9	13.0	3%	183.27%
Others	4.1	4.4	4.4	5.1	5.8	1%	8.95%
Total	336.2	381.2	372.9	390.0	398.6	100%	4.35%

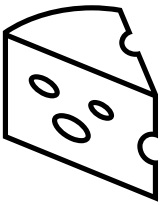
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



SLOVENIA

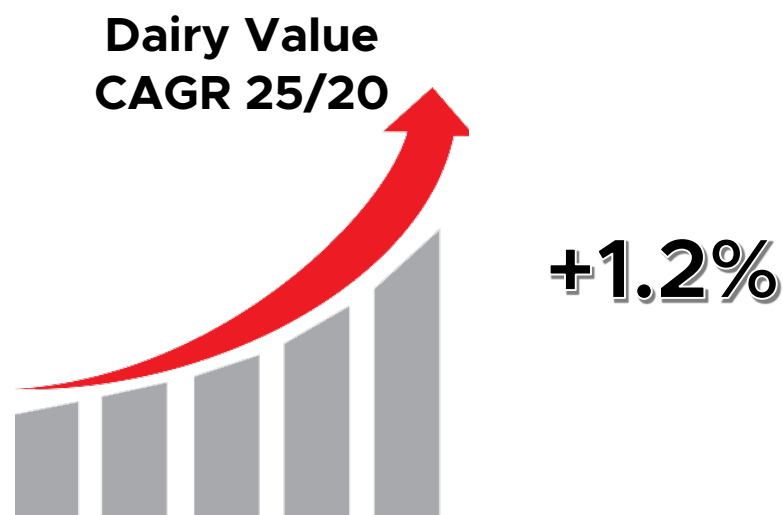
Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	15.4	16.0	17.0	16.1	15.7	84%	0.3%
Butter	2.7	3.0	2.9	2.8	2.9	16%	2.1%
Total	18.1	19.0	19.9	18.9	18.5	100%	0.6%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	49.6	54.5	55.8	56.0	56.4	77%	3.3%
Butter	12.7	15.8	16.5	16.4	17.0	23%	7.7%
Total	62.3	70.3	72.3	72.4	73.5	100%	4.2%



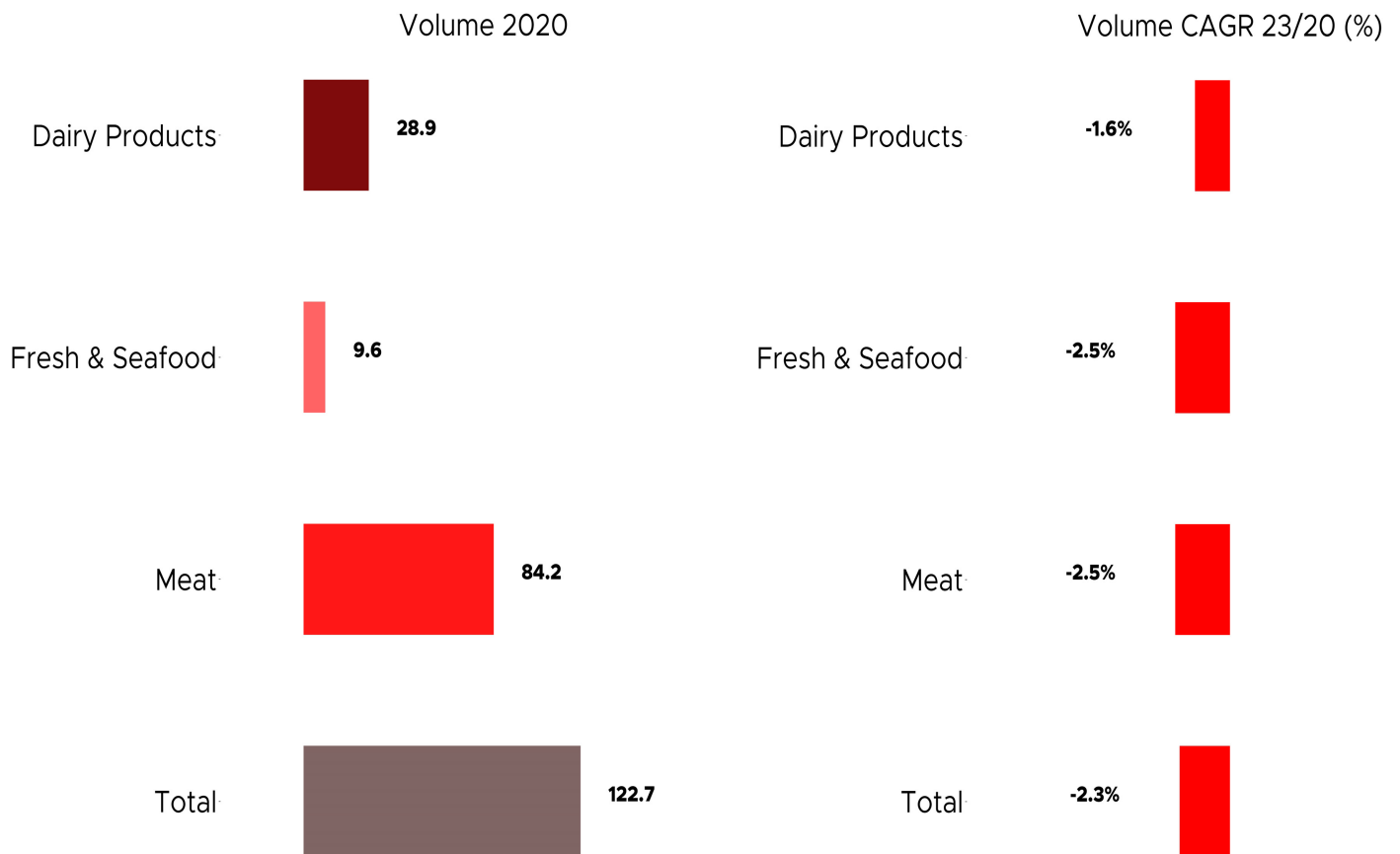
Source: elaboration on data Eurostat



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Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	27.6	27.1	28.9	27.5	-0.6%	-1.6%
Fresh & Seafood	9.4	8.9	9.6	8.9	-1.9%	-2.5%
Meat	81.7	78.2	84.2	78.2	-1.5%	-2.5%
Total	118.7	114.1	122.7	114.6	-1.3%	-2.3%





SLOVENIA

Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	3.1	2.9	3.1	2.9	-2.4%	-2.0%
Cheese	24.5	24.2	25.8	24.6	-0.4%	-1.6%
Fresh Fish	3.3	3.1	3.3	3.1	-2.3%	-1.8%
Fresh Seafood	0.2	0.2	0.2	0.2	-1.4%	-1.4%
Processed Fish & Seafood	5.9	5.6	6.0	5.5	-1.7%	-2.9%
Fresh Meat	31.7	32.8	36.3	36.4	1.1%	0.0%
Processed Meat	50.0	45.3	47.9	41.8	-3.2%	-4.4%



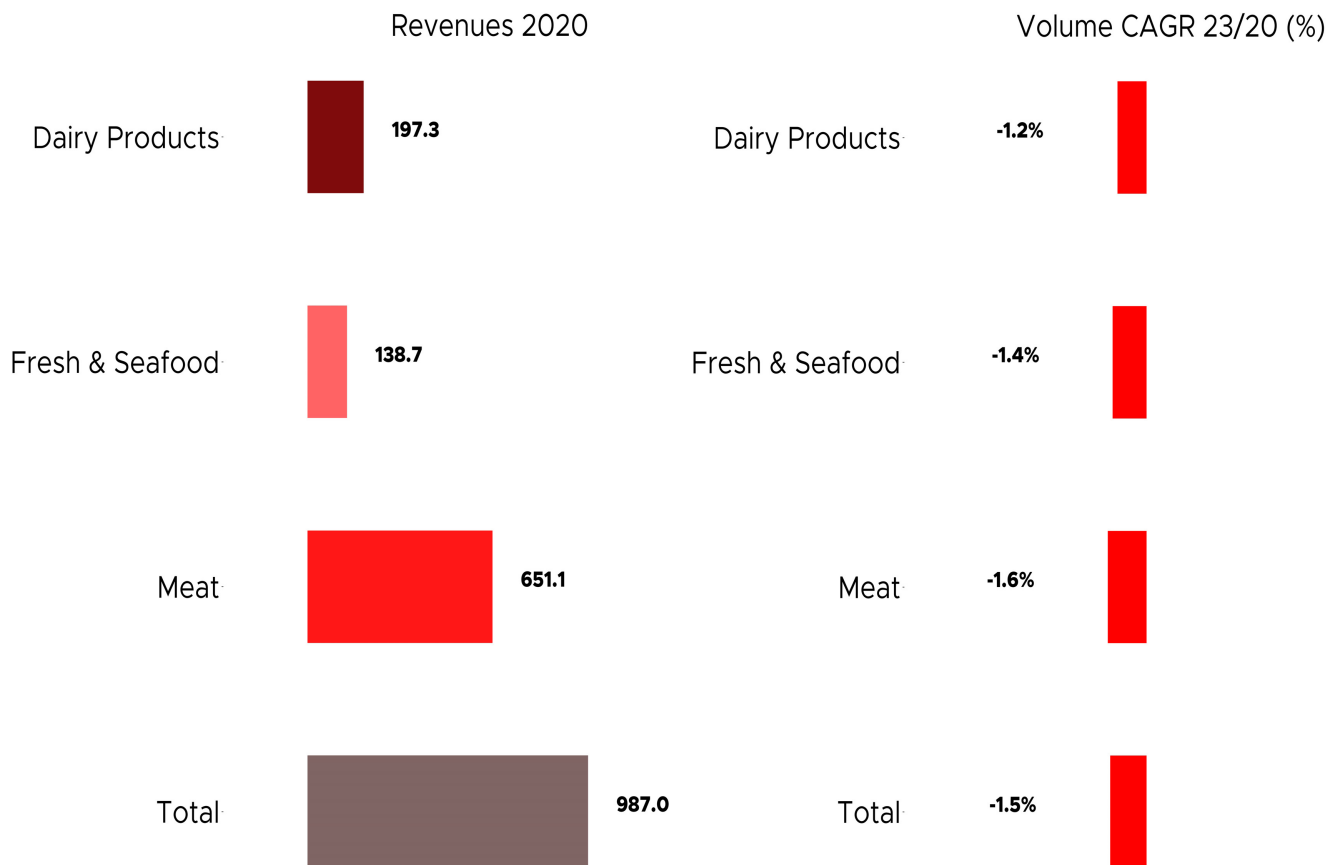


SLOVENIA



Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	185.1	183.7	197.3	190.4	-0.3%	-1.2%
Fresh & Seafood	127.4	127.2	138.7	132.9	-0.0%	-1.4%
Meat	602.3	598.1	651.1	620.6	-0.2%	-1.6%
Total	914.8	909.0	987.0	944.0	-0.2%	-1.5%





SLOVENIA

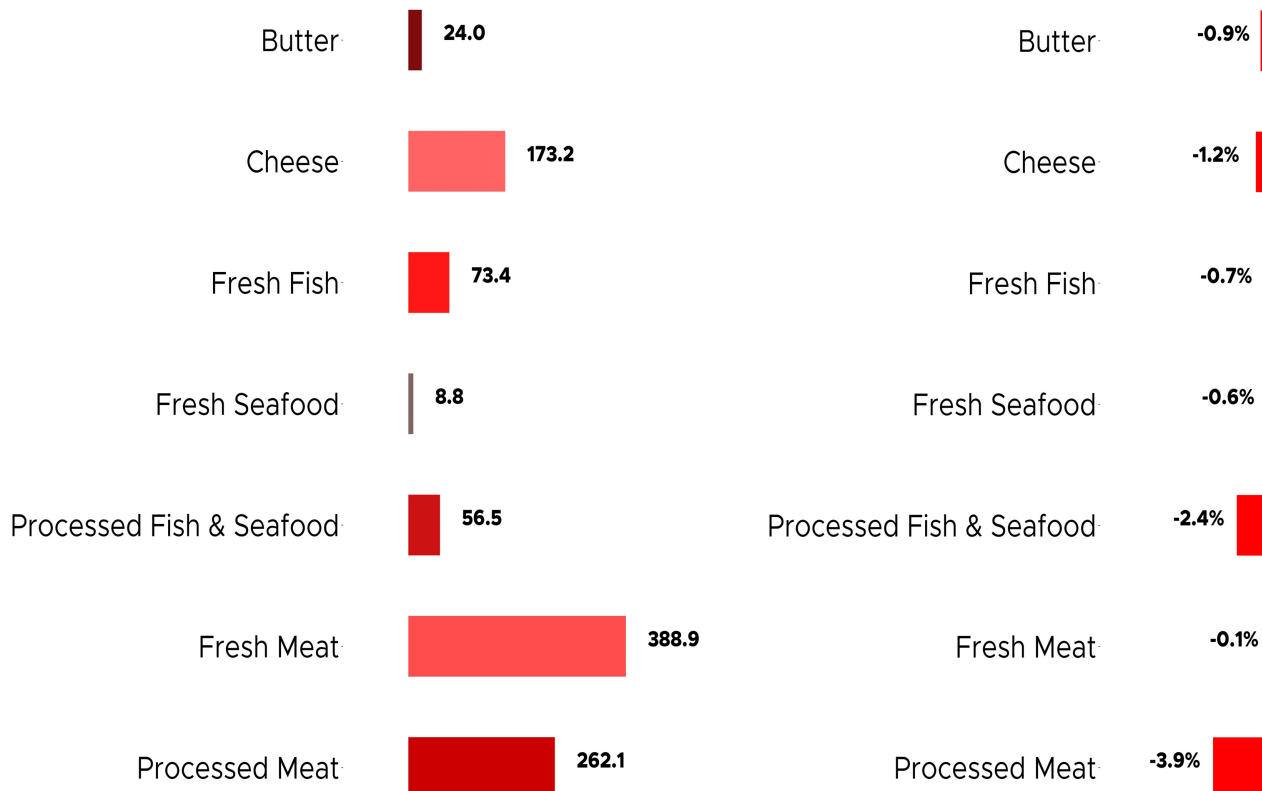


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	22.3	22.3	24.0	23.4	0.0%	-0.9%
Cheese	162.8	161.4	173.2	167.0	-0.3%	-1.2%
Fresh Fish	65.5	66.8	73.4	71.8	0.7%	-0.7%
Fresh Seafood	7.8	8.0	8.8	8.6	0.9%	-0.6%
Processed Fish & Seafood	54.1	52.4	56.5	52.5	-1.1%	-2.4%
Fresh Meat	337.5	351.7	388.9	388.0	1.4%	-0.1%
Processed Meat	264.9	246.4	262.1	232.6	-2.4%	-3.9%

Revenues 2020

Revenue CAGR 23/20 (%)



SPAIN



Consumers
47,351,567

CAGR 15/20

+0.4%

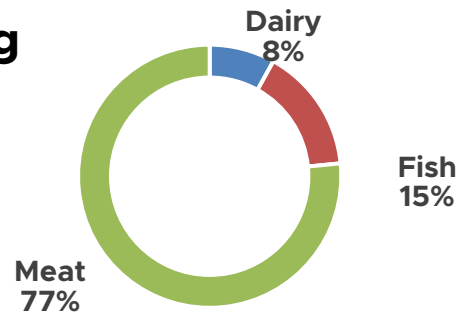
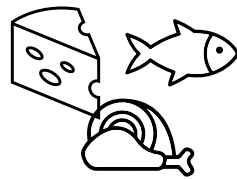


Gdp per capita
22.999 €

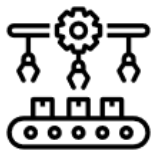
CAGR 15/20

+1.0%

Fresh food processing



Most growing category 16/20
Meat +5.52% per year



Food processing & packaging machinery market
562,8 mln €

Packaging type

Most consumed
Rigid Plastic
49.0%



Most growing 20/23
Rigid Plastic
+64.2 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA



SPAIN

Meat Processing

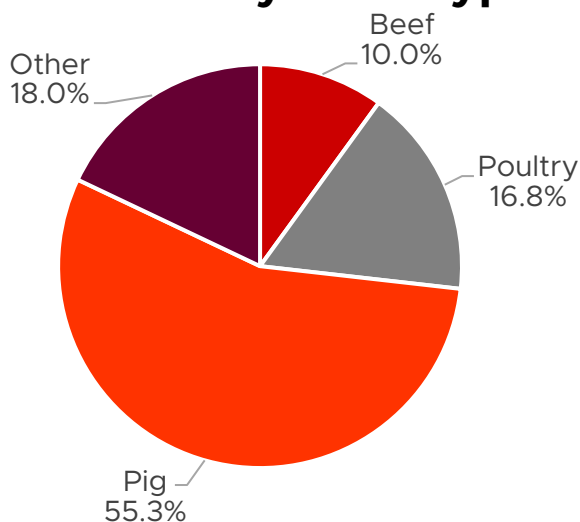
Meat Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	6,489.4	6,368.2	6,711.9	6,756.0	7,053.3	56%	2.11%
Processed+Sausage	1,266.2	1,357.6	1,443.4	1,415.7	1,449.0	11%	3.43%
Frozen	1,125.2	1,140.2	1,205.9	1,459.1	1,648.0	13%	10.01%
Others	2,148.2	2,290.7	2,376.0	2,446.0	2,481.1	20%	3.67%
Total	11,029.0	11,156.7	11,737.2	12,076.9	12,631.5	100%	3.45%

Meat Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	Cagr 20/16
Fresh	10,118.6	10,977.7	11,186.1	11,707.5	11,616.7	46%	3.51%
Processed+Sausage	6,308.9	6,771.7	6,979.4	7,256.0	7,472.7	30%	4.32%
Frozen	2,136.9	2,357.1	2,282.7	3,196.1	3,935.5	16%	16.49%
Others	1,674.7	1,901.9	1,934.1	1,877.1	2,065.0	8%	5.38%
Total	20,239.2	22,008.4	22,382.3	24,036.7	25,089.8	100%	5.52%

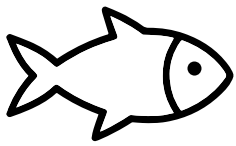
Shares 2020 by meat type



Meat Value CAGR 25/20



Source: elaboration on data Eurostat



SPAIN

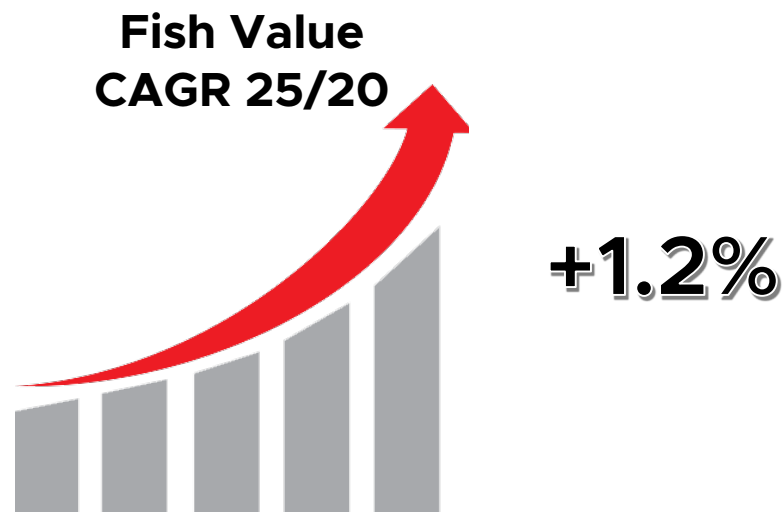
Fish Processing

Fish Volume by categories (mln Kg)

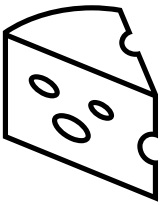
Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	17.8	16.1	13.2	28.4	31.3	3%	15.2%
Frozen	180.9	193.0	157.6	178.5	190.7	18%	1.3%
Processed	687.6	686.9	697.4	754.4	816.4	79%	4.4%
Total	886.3	896.1	868.2	961.3	1038.4	100%	4.0%

Fish Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Fresh	112.3	114.8	89.5	206.8	239.7	5%	20.9%
Frozen	546.3	618.7	553.3	662.0	677.2	13%	5.5%
Processed	3,622.2	3,941.6	4,043.3	4,220.4	4,124.4	82%	3.3%
Total	4,280.8	4,675.1	4,686.2	5,089.2	5,041.3	100%	4.2%



Source: elaboration on data Eurostat



SPAIN

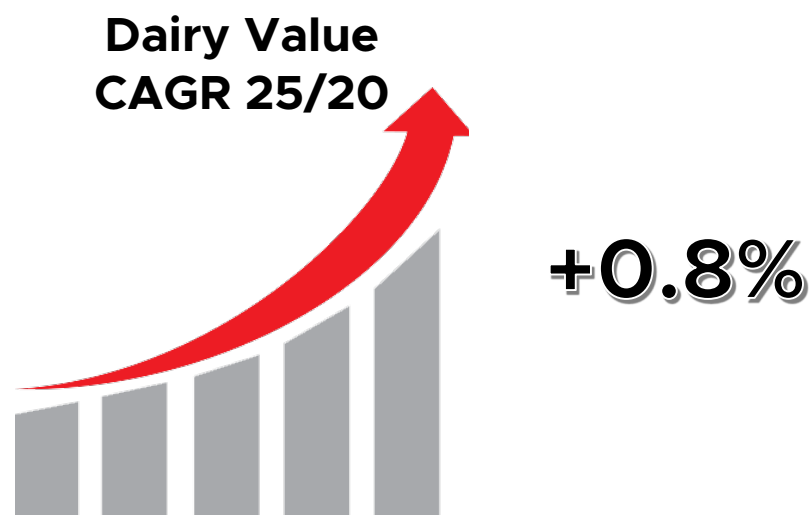
Dairy Processing

Dairy Volume by categories (mln Kg)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	495.0	511.2	504.7	511.5	519.9	91%	1.2%
Butter	49.2	50.8	52.1	47.8	49.4	9%	0.1%
Total	544.3	562.0	556.8	559.3	569.3	100%	1.1%

Dairy Value by categories (mln euro)

Type	2016	2017	2018	2019	2020	Shares%	cagr 20/16
Cheese	726.7	717.8	763.0	832.0	933.0	85%	6.4%
Butter	143.9	175.0	182.9	175.1	170.6	15%	4.3%
Total	870.6	892.7	945.9	1,007.0	1,103.7	100%	6.1%



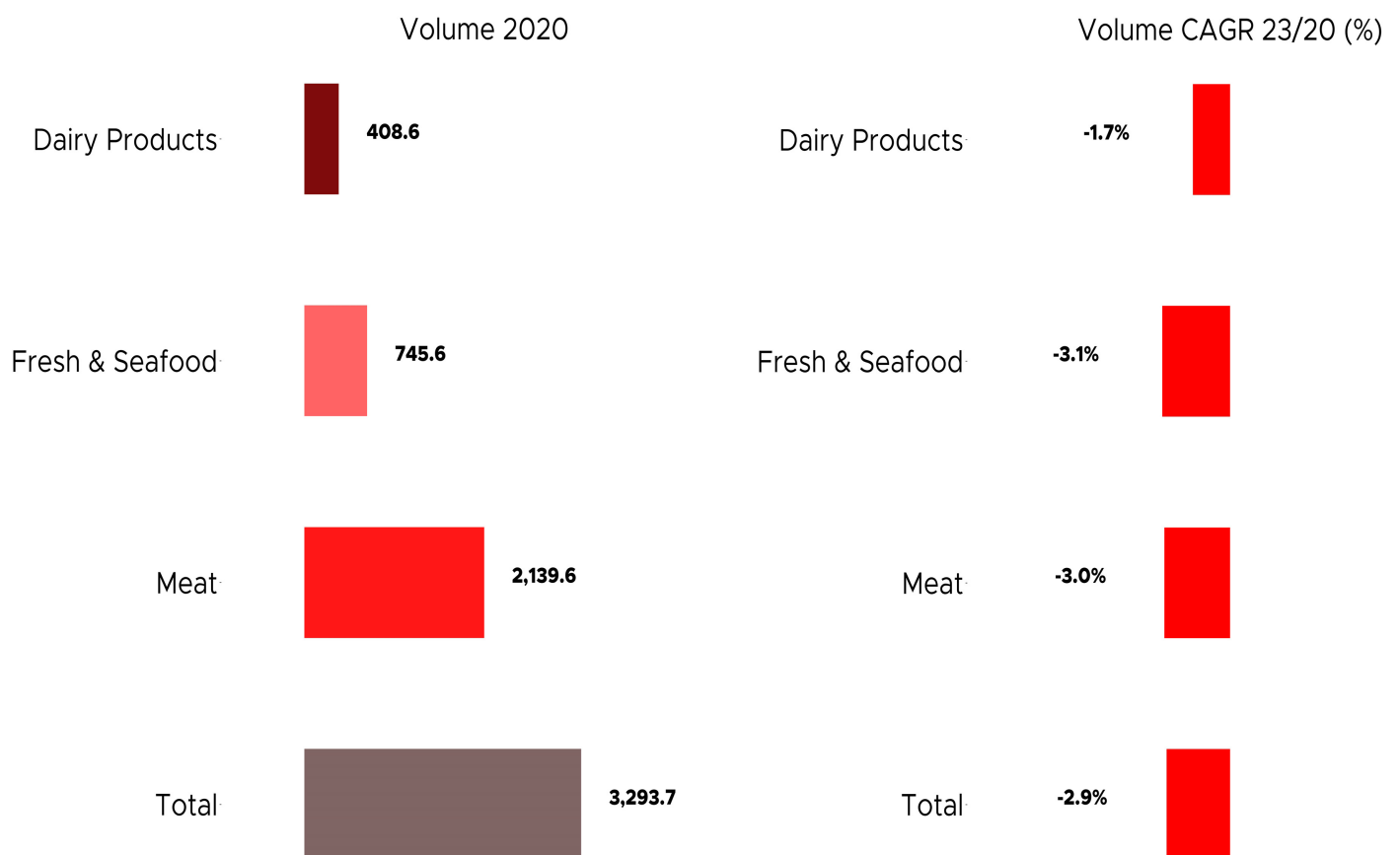
Source: elaboration on data Eurostat



SPAIN

Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	367.0	373.2	408.6	388.1	0.6%	-1.7%
Fresh & Seafood	702.5	672.0	745.6	677.6	-1.5%	-3.1%
Meat	1,995.2	1,927.2	2,139.6	1,949.9	-1.1%	-3.0%
Total	3,064.6	2,972.4	3,293.7	3,015.6	-1.0%	-2.9%

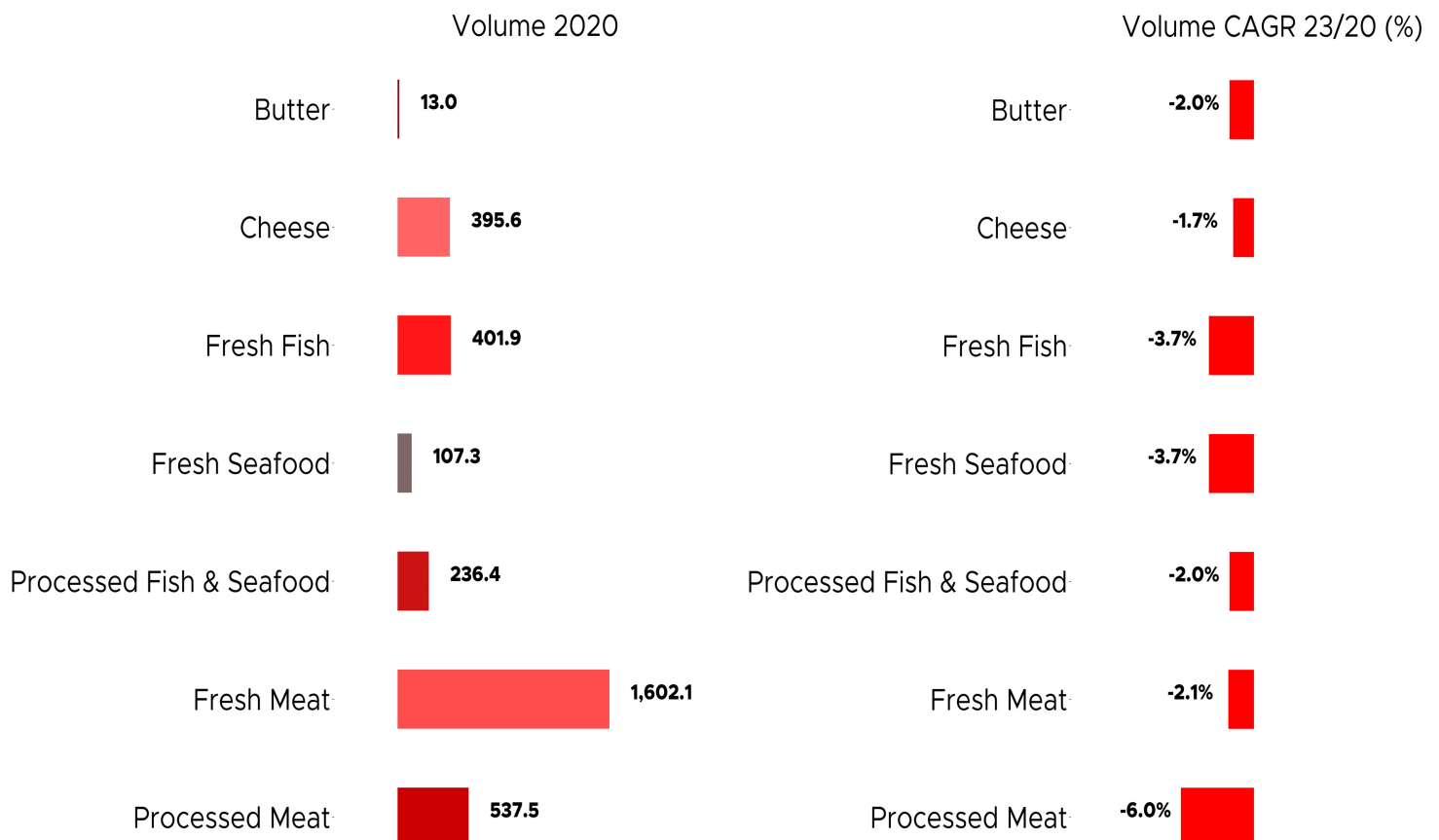




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Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	12.3	11.9	13.0	12.3	-1.1%	-2.0%
Cheese	354.7	361.3	395.6	375.8	0.6%	-1.7%
Fresh Fish	394.2	363.7	401.9	359.3	-2.7%	-3.7%
Fresh Seafood	105.3	97.1	107.3	96.0	-2.6%	-3.7%
Processed Fish & Seafood	203.0	211.2	236.4	222.4	1.3%	-2.0%
Fresh Meat	1,422.0	1,428.8	1,602.1	1,503.0	0.2%	-2.1%
Processed Meat	573.2	498.4	537.5	446.9	-4.6%	-6.0%





SPAIN

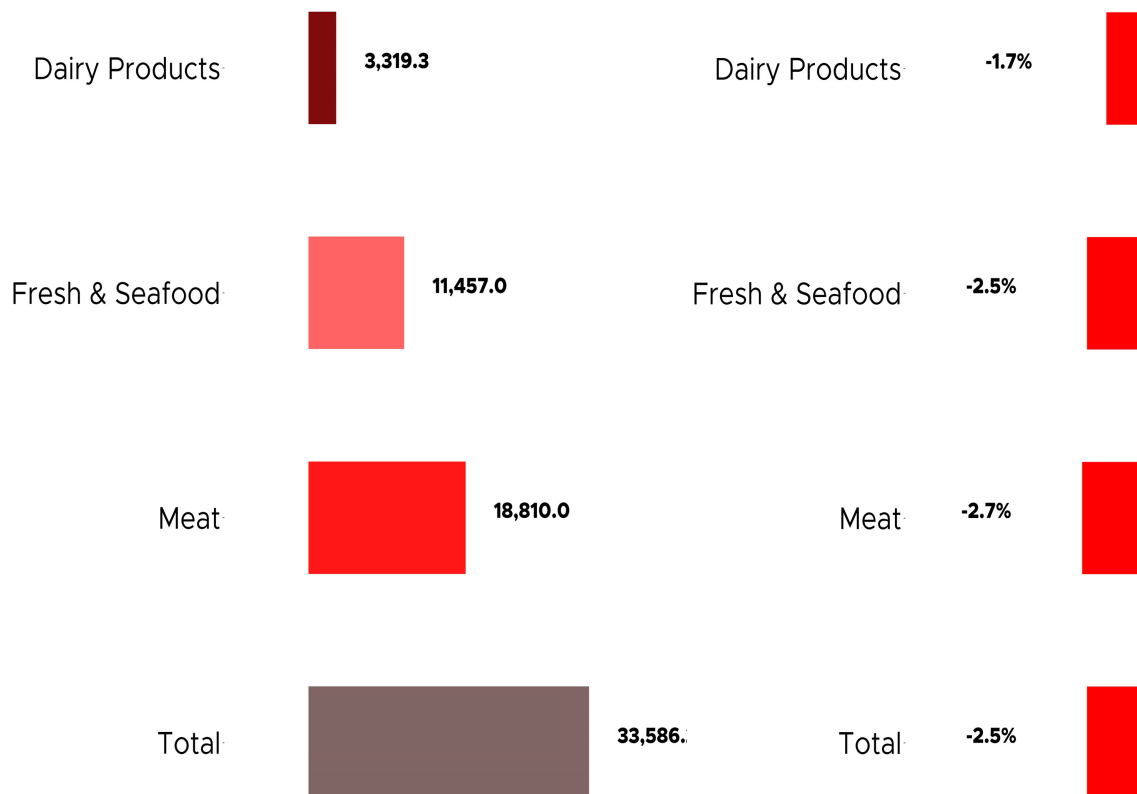


Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	3,010.4	3,030.9	3,319.3	3,148.5	0.2%	-1.7%
Fresh & Seafood	10,231.2	10,262.1	11,457.0	10,625.4	0.1%	-2.5%
Meat	16,930.3	16,881.5	18,810.0	17,340.9	-0.1%	-2.7%
Total	30,171.9	30,174.5	33,586.2	31,114.8	0.0%	-2.5%

Revenues 2020

Volume CAGR 23/20 (%)





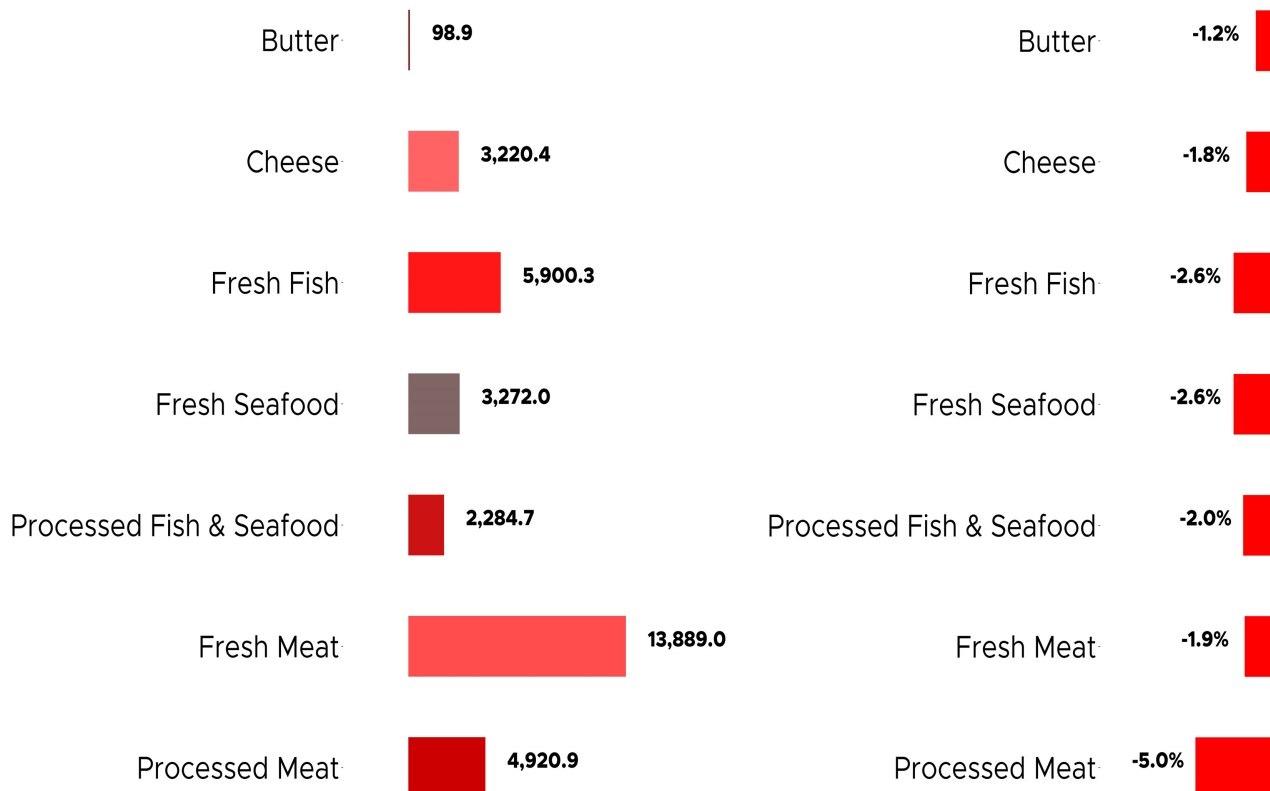
SPAIN

Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	87.8	89.8	98.9	95.3	0.8%	-1.2%
Cheese	2,922.6	2,941.1	3,220.4	3,053.2	0.2%	-1.8%
Fresh Fish	5,293.5	5,291.1	5,900.3	5,453.1	-0.0%	-2.6%
Fresh Seafood	2,934.8	2,934.0	3,272.0	3,024.4	-0.0%	-2.6%
Processed Fish & Seafood	2,002.9	2,037.0	2,284.7	2,147.8	0.6%	-2.0%
Fresh Meat	12,084.6	12,361.2	13,889.0	13,124.2	0.8%	-1.9%
Processed Meat	4,845.7	4,520.3	4,920.9	4,216.7	-2.3%	-5.0%

Revenues 2020

Revenue CAGR 23/20 (%)



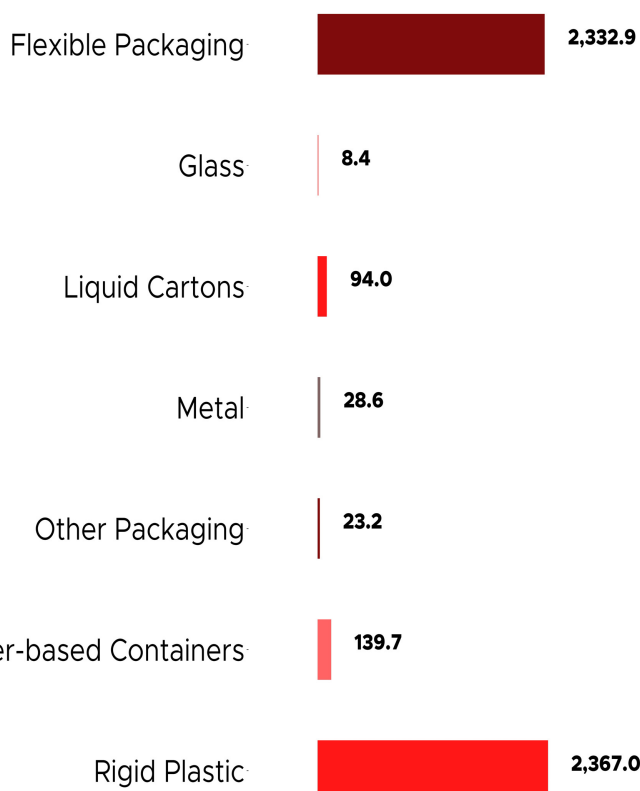


SPAIN

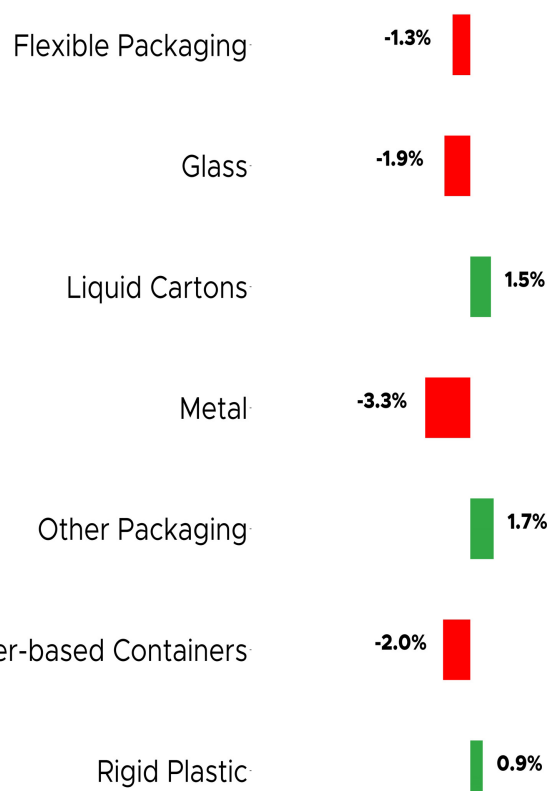
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	2,130.3	2,188.2	2,332.9	2,239.9	0.9%	-1.3%
Glass	9.2	8.4	8.4	7.9	-3.1%	-1.9%
Liquid Cartons	90.9	90.8	94.0	98.2	-0.0%	1.5%
Metal	32.4	29.0	28.6	25.8	-3.7%	-3.3%
Other Packaging	21.1	22.4	23.2	24.4	2.0%	1.7%
Paper-based Containers	144.5	135.6	139.7	131.4	-2.1%	-2.0%
Rigid Plastic	2,249.9	2,263.9	2,367.0	2,431.2	0.2%	0.9%

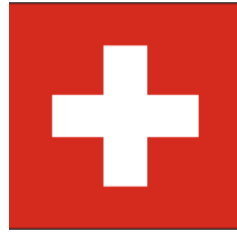
Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)



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Consumers

8,636,896

CAGR 15/20

+0.8%



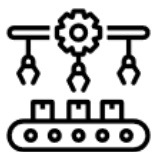
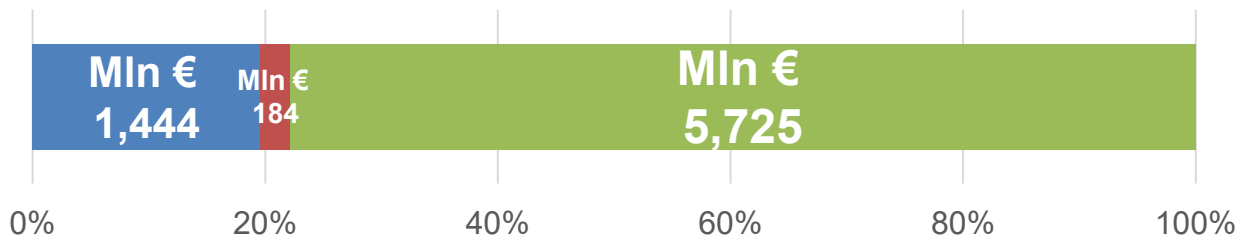
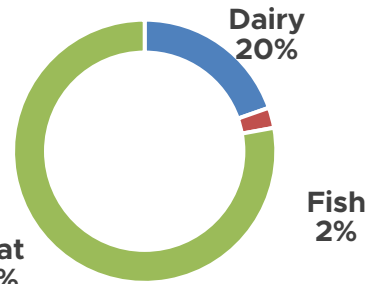
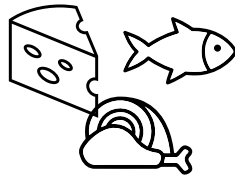
Gdp per capita

73.611 €

CAGR 15/20

+0.4%

Fresh food processing



Food processing & packaging machinery market

113,9 mln €

Packaging type

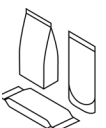
Most consumed

Flexible Packaging 55.7%



Most growing 20/23

Flexible Packaging + 19.0 mln pieces



Source: elaboration on data World Bank, Eurostat, Euromonitor, UCIMA

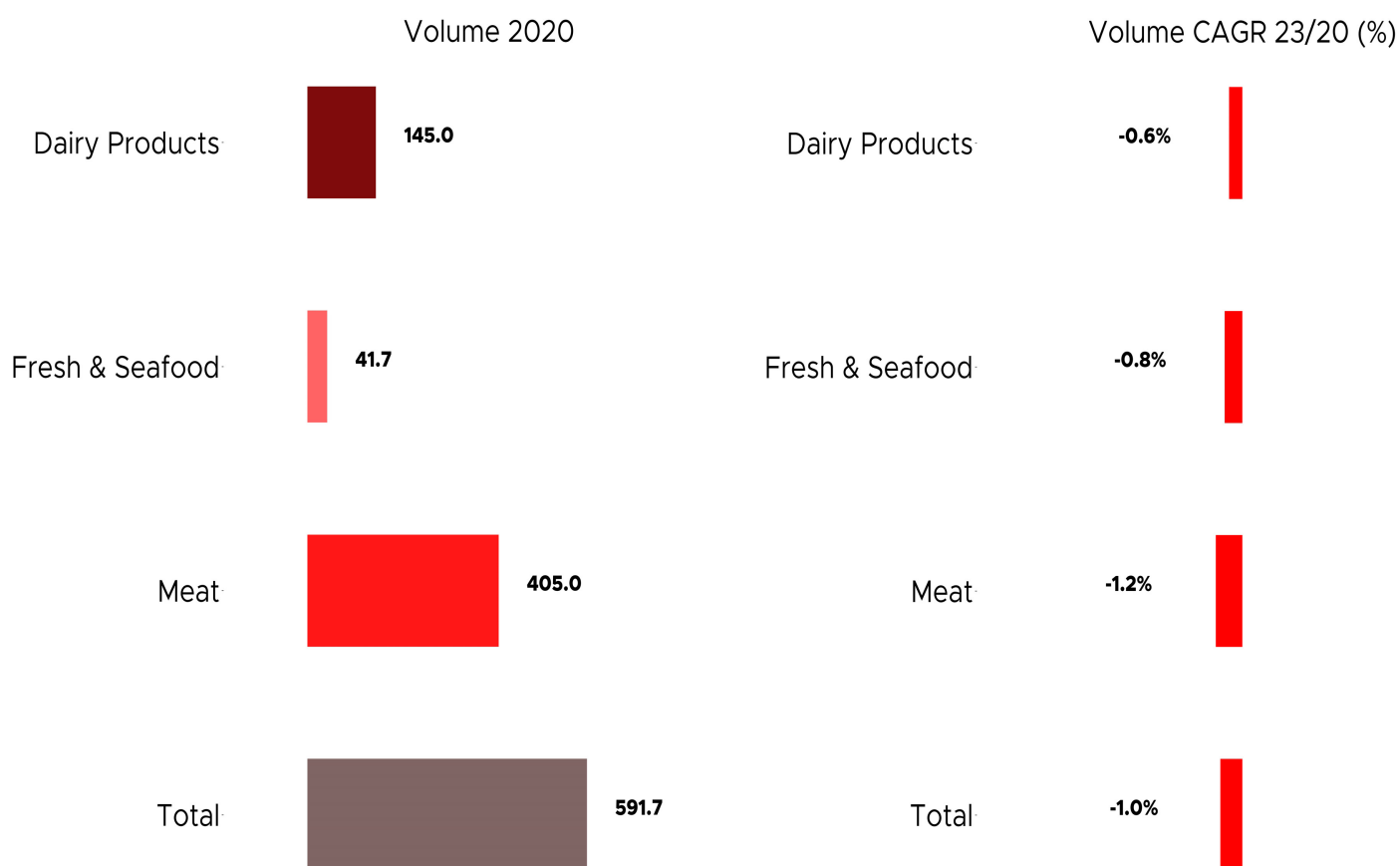


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Fresh Food Consumption Total Volume (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	139.0	137.6	145.0	142.3	-0.3%	-0.6%
Fresh & Seafood	40.7	39.4	41.7	40.6	-1.1%	-0.8%
Meat	397.6	383.1	405.0	390.3	-1.2%	-1.2%
Total	577.2	560.1	591.7	573.3	-1.0%	-1.0%

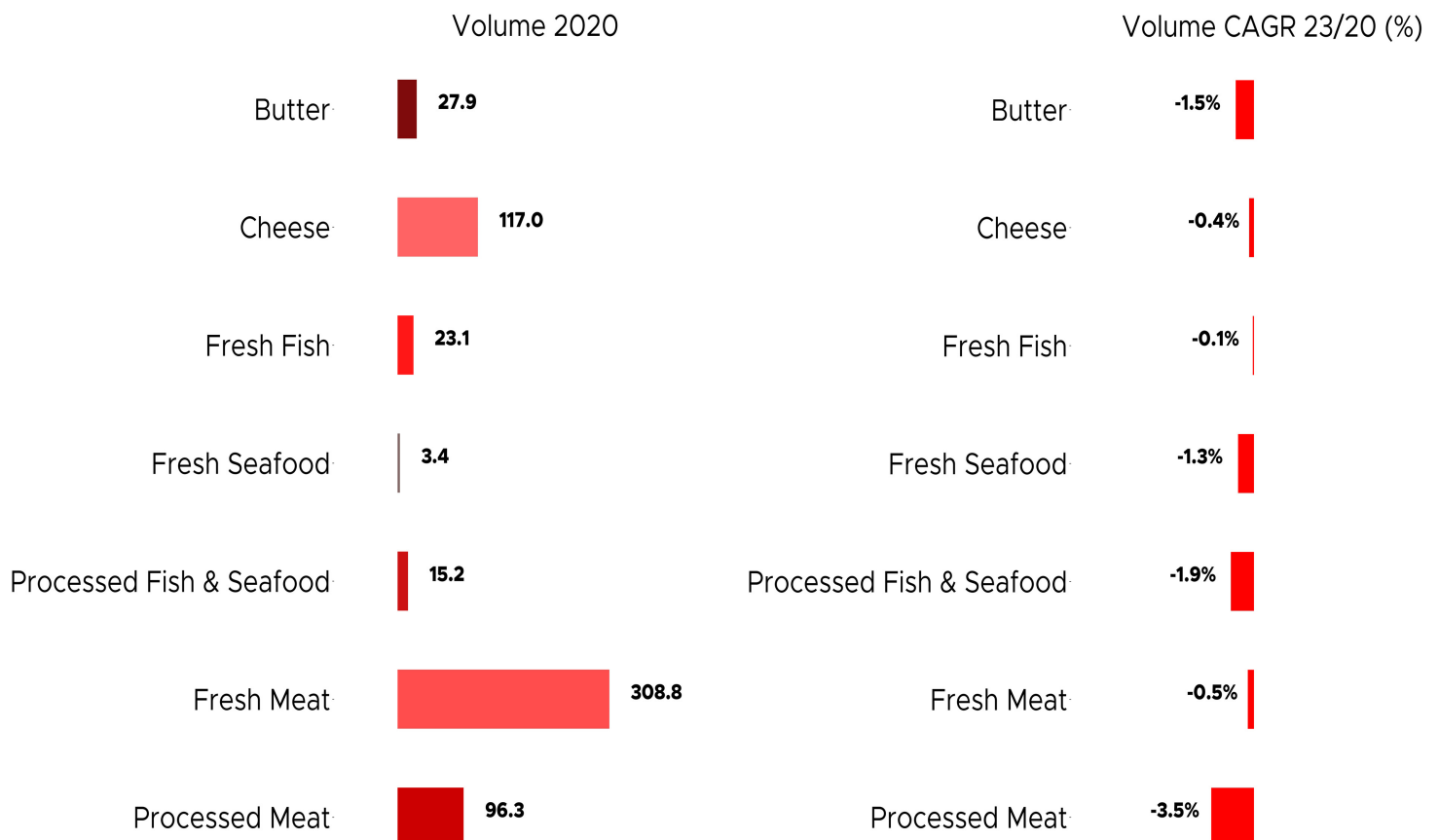




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Fresh Food Consumption Volume by subcategories (mln Kg)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	28.6	26.7	27.9	26.8	-2.3%	-1.5%
Cheese	110.4	110.9	117.0	115.6	0.2%	-0.4%
Fresh Fish	21.7	21.7	23.1	23.0	-0.0%	-0.1%
Fresh Seafood	3.3	3.2	3.4	3.3	-1.1%	-1.3%
Processed Fish & Seafood	15.6	14.5	15.2	14.3	-2.5%	-1.9%
Fresh Meat	293.6	289.8	308.8	303.8	-0.4%	-0.5%
Processed Meat	104.0	93.3	96.3	86.5	-3.6%	-3.5%





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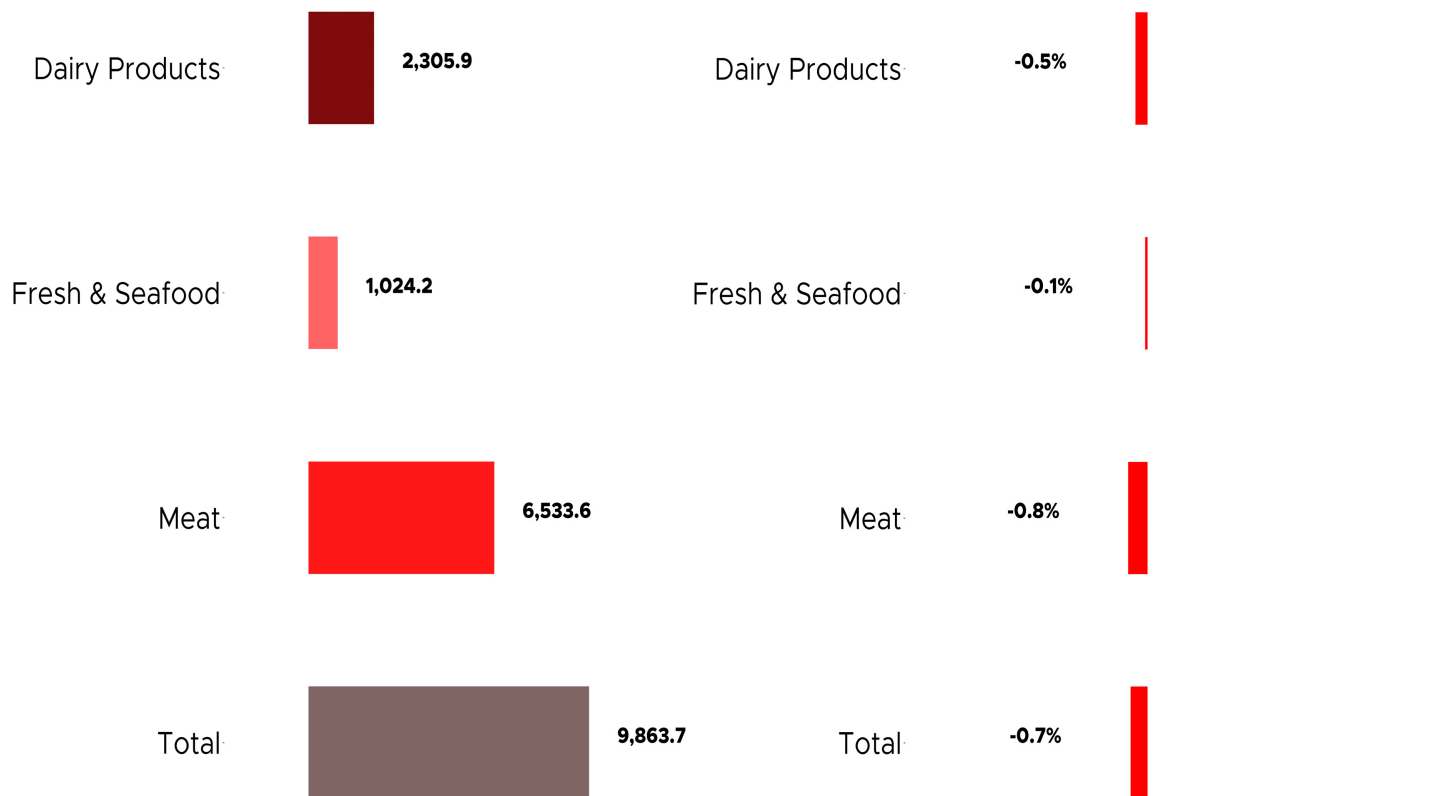


Fresh Food Consumption Total Value (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Dairy Products	2,196.4	2,188.5	2,305.9	2,268.5	-0.1%	-0.5%
Fresh & Seafood	947.2	960.9	1,024.2	1,020.0	0.5%	-0.1%
Meat	6,215.4	6,171.0	6,533.6	6,374.4	-0.2%	-0.8%
Total	9,359.0	9,320.4	9,863.7	9,662.9	-0.1%	-0.7%

Revenues 2020

Volume CAGR 23/20 (%)





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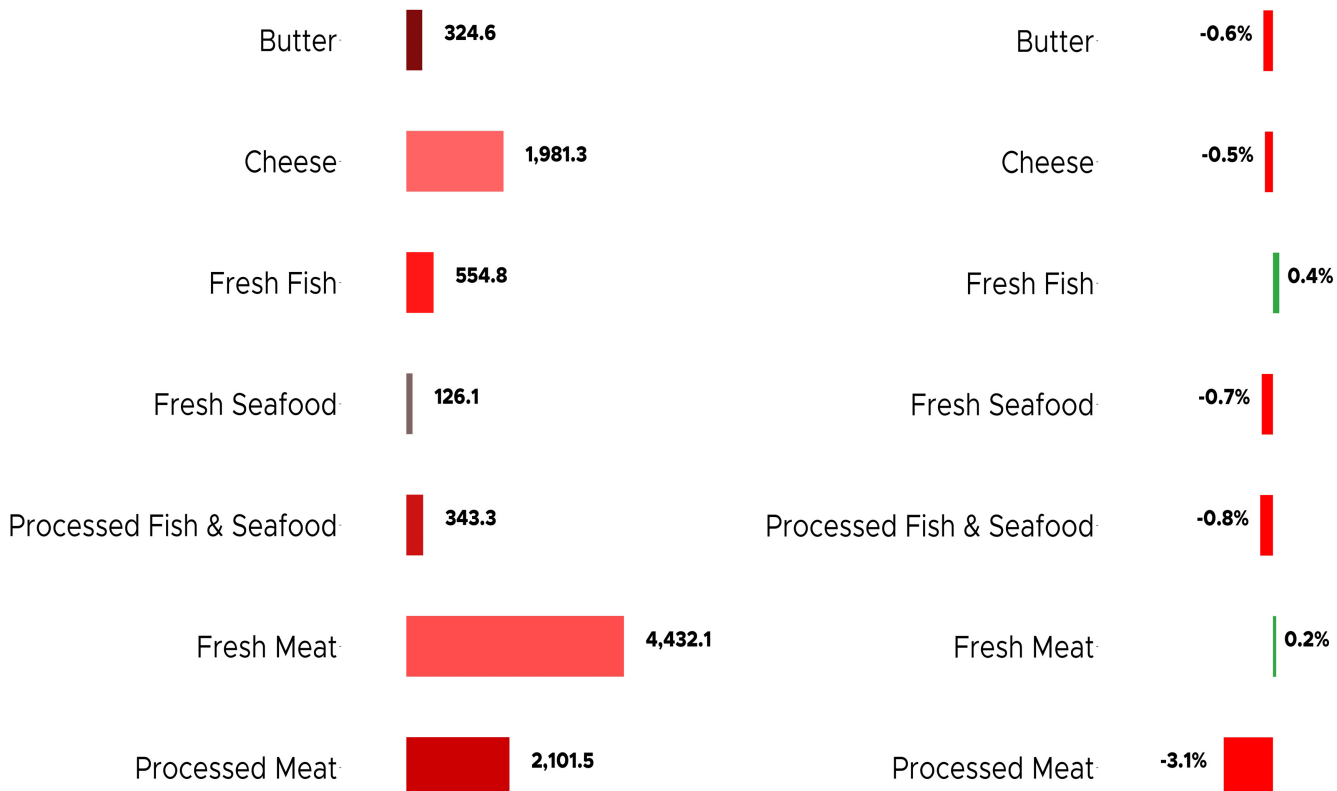


Fresh Food Consumption Value by subcategories (mln €)

Settore	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Butter	309.3	308.1	324.6	319.3	-0.1%	-0.6%
Cheese	1,887.1	1,880.4	1,981.3	1,949.2	-0.1%	-0.5%
Fresh Fish	502.1	517.7	554.8	561.6	1.0%	0.4%
Fresh Seafood	119.2	119.0	126.1	123.4	-0.1%	-0.7%
Processed Fish & Seafood	325.9	324.2	343.3	335.1	-0.2%	-0.8%
Fresh Meat	4,035.6	4,142.8	4,432.1	4,461.9	0.9%	0.2%
Processed Meat	2,179.7	2,028.2	2,101.5	1,912.6	-2.4%	-3.1%

Revenues 2020

Revenue CAGR 23/20 (%)



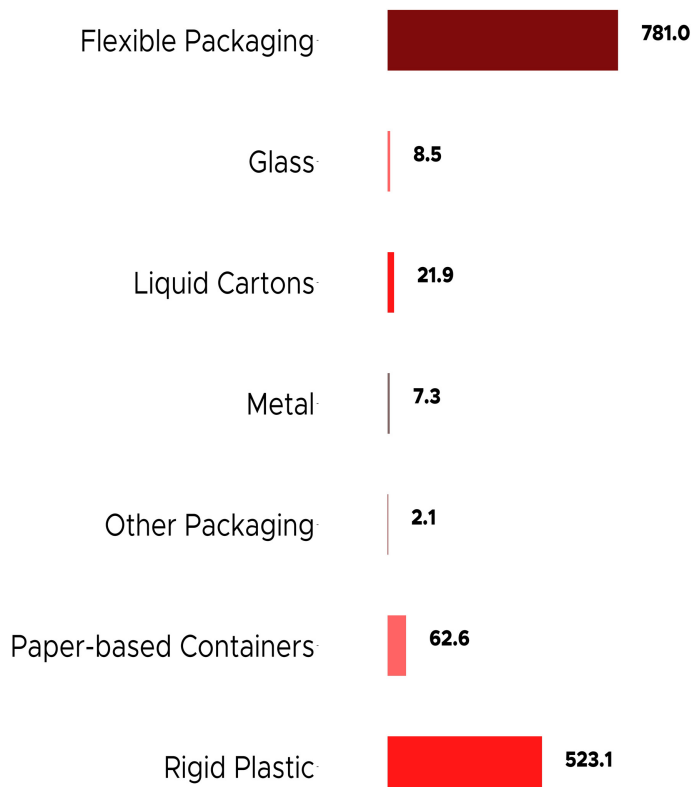


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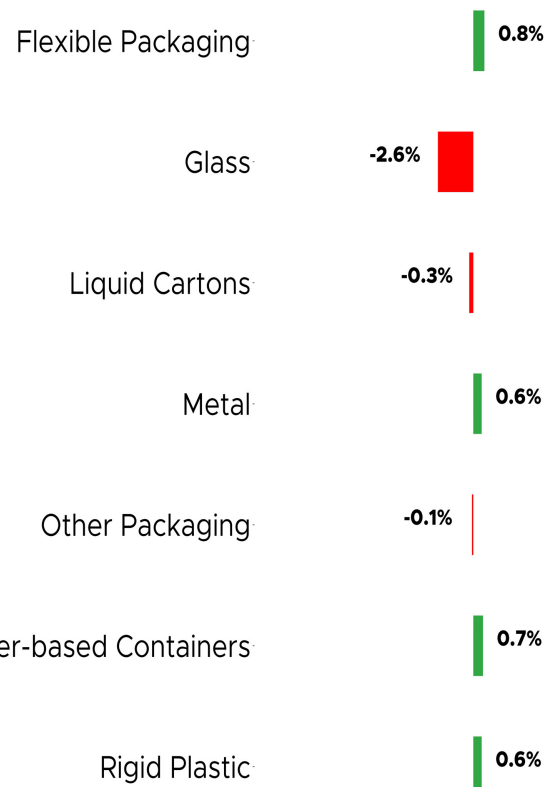
Fresh Food Consumption Pack Type Volume (mln unit)

Pack Type	2016	2019	2020	2023	cagr2016_2019	cagr2020_2023
Flexible Packaging	720.4	749.6	781.0	800.1	1.3%	0.8%
Glass	9.5	8.7	8.5	7.9	-2.6%	-2.6%
Liquid Cartons	21.7	21.5	21.9	21.7	-0.3%	-0.3%
Metal	6.8	7.1	7.3	7.5	1.2%	0.6%
Other Packaging	2.1	2.0	2.1	2.1	-1.7%	-0.1%
Paper-based Containers	58.5	59.6	62.6	64.0	0.6%	0.7%
Rigid Plastic	498.5	511.0	523.1	533.0	0.8%	0.6%

Pack type 2020 (mln units)



Pack type CAGR 23/20 (%)





Raccolta ed elaborazione dati:
Centro Studi MECS
www.mecs.org

Chiusura report: settembre 2021

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