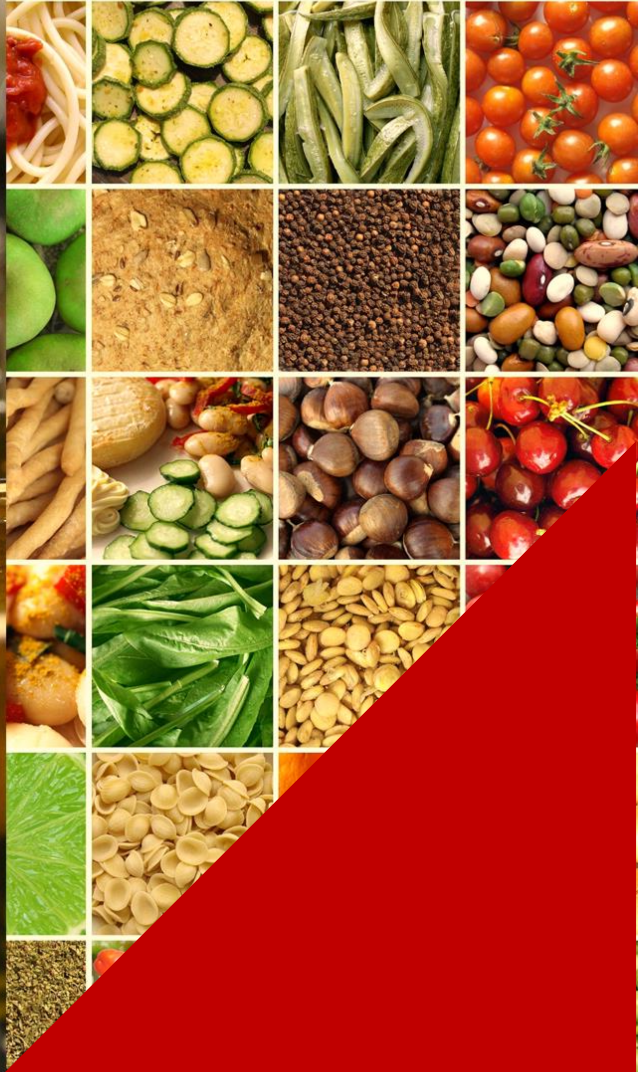


FOOD INDUSTRIES IN ITALY

The Italian Way of Fooding - a value proposition for foreign investors

2023

CONTENTS

WHY INVEST
IN THE ITALIAN FOOD INDUSTRIES

WHY INVEST IN ITALIAN FOOD INDUSTRIES

Unrivaled domestic consumers market thanks to the Italian Food-based culture

Resilient export-driven industry

Top location at the heart of the Mediterranean

Skilled workforce at competitive costs

Massive availability of exclusive premium quality products

Global demand of Made in Italy products

Upmarket, highly specialized providers throughout the supply chain.

Dynamic and innovative R&D ecosystem

+ Advantageous Invitalia's ad hoc incentives & services

CONTRATTO DI SVILUPPO

KEY FACTS & FIGURES: ITALIAN FOOD INDUSTRIES

Italy is a renowned world leader in the Agri-Food Industry distinguished by its long-standing food-based culture and traditional vocation for food safety and quality.

€ 549 B
Italian Agri-Food core system value in 2021

The turnover of the agri-food system accounts for 15% of the entire economy and includes agriculture, fishing and forestry, F&B manufacturing, wholesale, retail, and Ho.Re.Ca

€ 3.96 B
Italian organic market value in 2021

62.333 agricultural holdings dedicated to organic production

Leading country in the EU with 86.144 organic operators

845
PDO & PGI certified products in 2022

Italy counts with the largest number of agri-food products with a Protected Designation of Origin and a Protected Geographical Indication recognized by the EU.

€50.5 B
exports of agri-food products in 2021

+11,3%% compared to 2020 despite the effects of the Covid-19 pandemic crisis.

Imports amounted €48,3 billion (+13,6% compared to 2020).

€2.9 billion
exports of organic products in 2021

As of the year 2021, Italy has recorded the highest export value of organic products in Europe

59 million people
consumer market as of December 31, 2021

Italian households spend €469 monthly in F&B.

Italian households' final expenditure share in Food and Non-alcoholic Beverages (15,5%) is higher than in Germany (11,8%), France (13,9%), Spain (15,2%) and the EU27 average (14,3).

Sources: Crea, Sinab, FiBL & IFOAM, Ismea-Qualivita, I.stat,

TOP LOCATION AT THE HEART OF THE MEDITERRANEAN

Italy boasts an advantageous strategic geopolitical location: in the heart of Europe and at the center of the Mediterranean region, which reinforces its position as a trade and logistics hub in the EMEA market.

Foreign entrepreneurs are welcome to join the remarkable Italian Agricultural and Food&Beverage manufacturing industry. Investing in Italy means positioning businesses at the **top of the global market value chain**, endorsing trademarks with the Made in Italy brand's exclusiveness.

Moreover, entrepreneurs could benefit from ample institutional **tailored-made financial incentives** to support investments projects targeted at any stage of the supply chain.

MARKET OVERVIEW

ITALIAN AGRI-FOOD VALUE-CHAIN

The agri-food industry is characterized by an extended value chain in which multiple actors are involved and highly interconnected.

Within the *Agri-food Value-chain*, we identify all economic activities related to the agri-food world as well as the machinery and equipment involved in every stage of the farm to fork value chain, i.e., cultivation, harvest, post-harvest, stock farming, processing, storage, transport and distribution of agricultural and Food&Beverage products.

€ 549 B in 2021

the agri-food system's performance accounted for a substantial 15% of the entire economy in 2021

	Specialized machinery manufacturing	***Agriculture, fishing and forestry***	***F&B processing and preserving***	Packaging services	***Wholesales & Retail***	***Ho.Re.Ca***	*Final consumer*
Operators	3.421	***761.312***	***54.000***	712	***163.815***	***303.619***	59 **million people consumer market**
Workforce	62.807	***913.000***	***479.000***	7.413	***448.226***	***1.181.542***	
Turnover	€ 15,6 B	***€ 61,6 B***	***€ 151,5 B***	€ 1,8 B	***€ 290 B***	***€ 44,7 B***	

Sources: Crea, Ismea, I.stat

MASTERS OF #PDOECONOMY

845

319 Agri-food products
526 Wines

Products with specific characteristics, linked to their geographical origin and traditional know-how that make **Italy a unique country** in the world.

€19,1 B Production value 2021

- 21% of total agri-food sector

€10,7 B Export 2021

- 21% of total agri-food exports

198.842 operators

291 Consortiums for the Protection of PDO, GPI, and TSG products

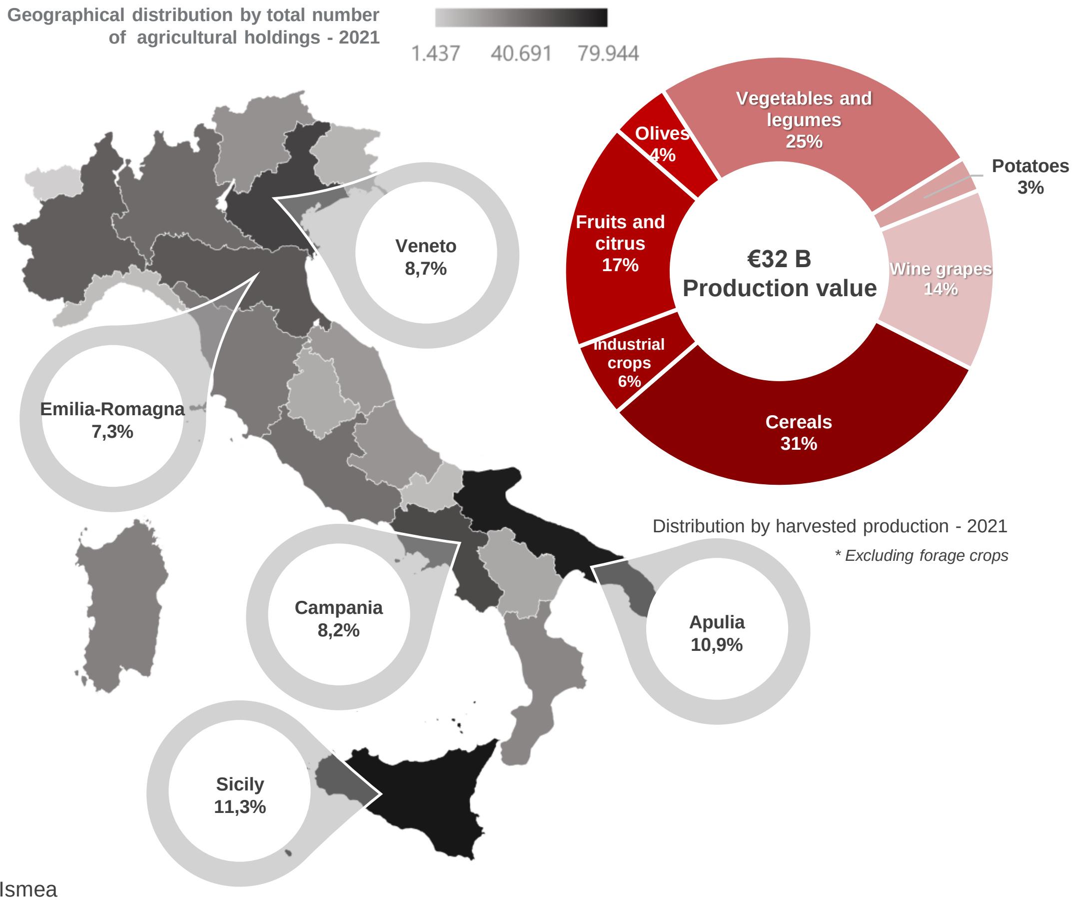
Highest number of agri-food products with a Protected Designation of Origin and a Protected Geographical Indication recognised by the European Union.

Sources: Https://Dopigp.Politicheagricole.It/, Rapporto Ismea-qualivita 2022

WIDESPREAD PRIMARY PRODUCTION

Italy possesses a vast and diverse assortment of crops extensively cultivated throughout the nation, particularly in the southern regions.

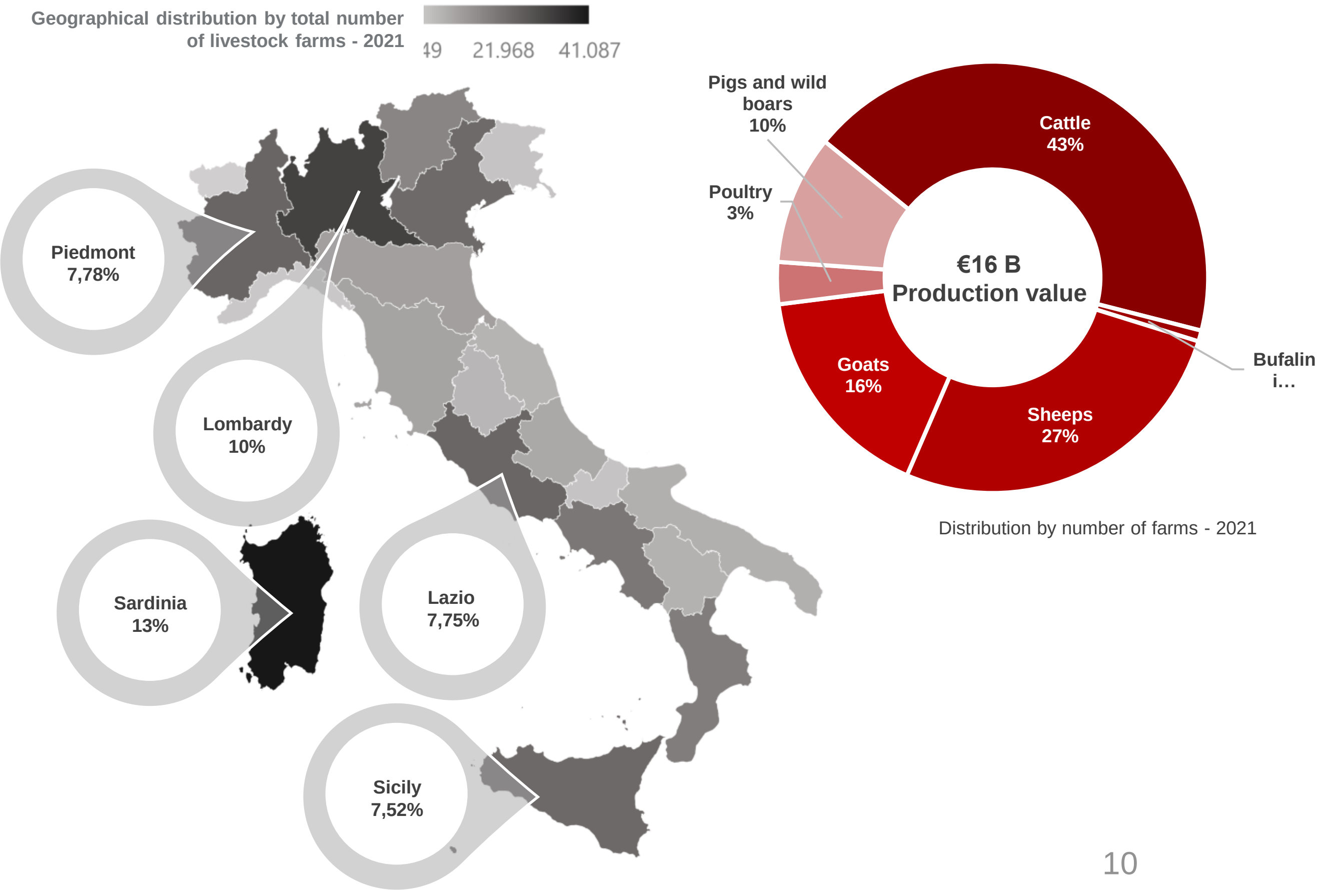
AGRICULTURAL PRODUCTION: 736.126 FARMS



Distribution by harvested production - 2021

** Excluding forage crops*

LIVESTOCK: 314.161 FARMS



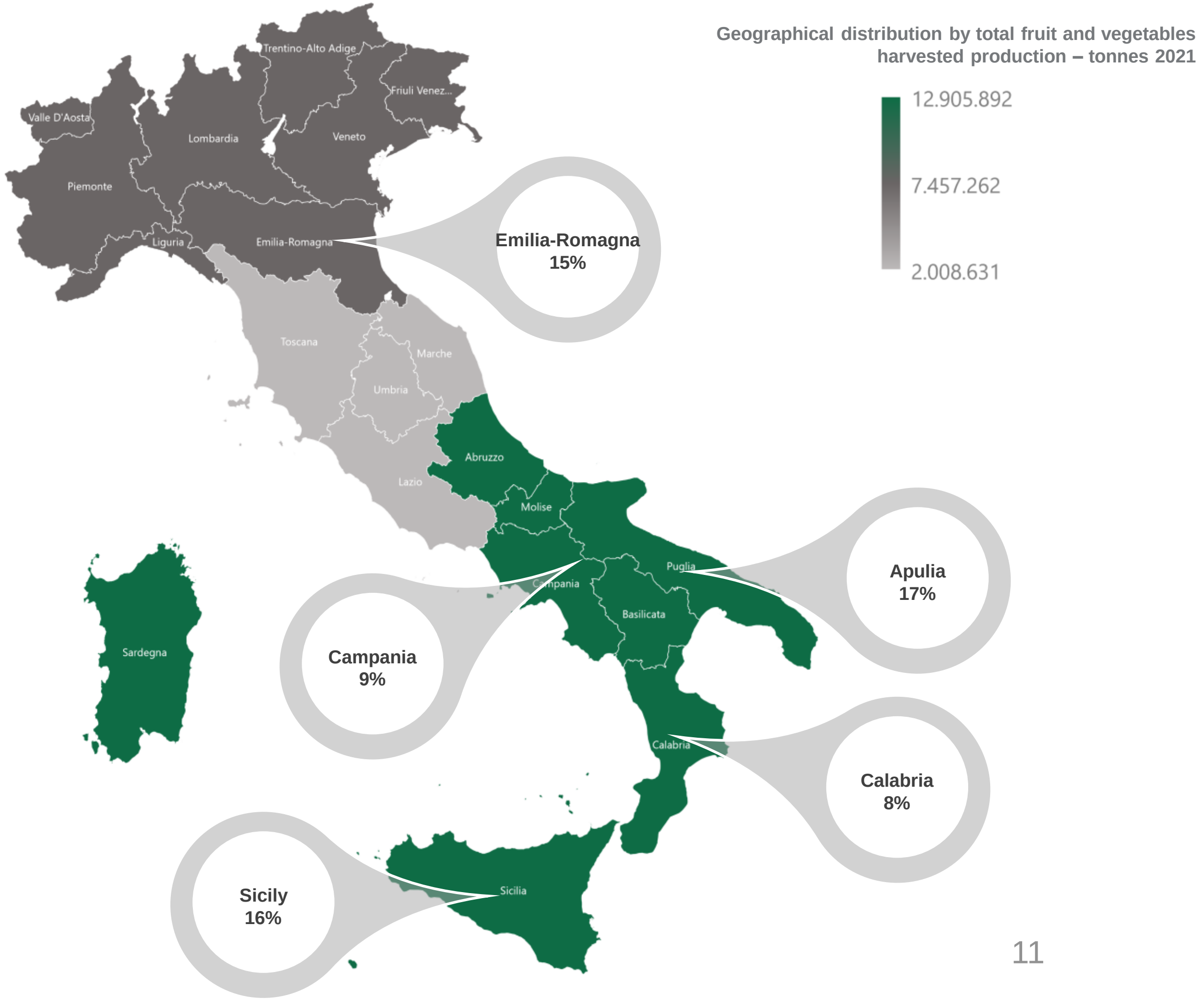
Distribution by number of farms - 2021

Sources: Ismea

WIDESPREAD PRIMARY PRODUCTION: FRUITS&VEGS

Italian southern regions boast a remarkable production capacity of a wide variety of fruits and vegetable crops.

Regions by total fruit and vegetables harvested production - 2021	Vegetables & legumes (tonnes)	Fruits and citrus (tonnes)	Total harvested production (tonnes)
Apulia	**2.800.851**	**1.049.156**	**3.850.007**
Sicily	**1.159.669**	**2.469.793**	**3.629.462**
Emilia-Romagna	**2.826.444**	**569.756**	**3.396.200**
Campania	**1.234.547**	**764.272**	**1.998.819**
Calabria	**513.738**	**1.213.622**	**1.727.360**
Lazio	1.169.710	314.786	1.484.496
Lombardy	993.663	65.876	1.059.540
Bolzano	8.526	938.319	946.845
Veneto	608.138	242.834	850.972
Abruzzo	539.571	80.070	619.641
Piedmont	307.430	295.956	603.386
Basilicata	287.407	249.687	537.094
Trento	2.169	515.150	517.319
Sardinia	267.280	87.396	354.676
Toscany	275.847	33.537	309.383
Molise	171.714	17.119	188.833
Marche	133.696	24.978	158.674
Friuli Venezia Giulia	9.073	69.472	78.545
Umbria	53.268	2.809	56.077
Liguria	13.952	3.461	17.413
Valle D'Aosta	285	6.128	6.414
TOTAL ITALY	***13.376.979***	***9.014.176***	***22.391.155***



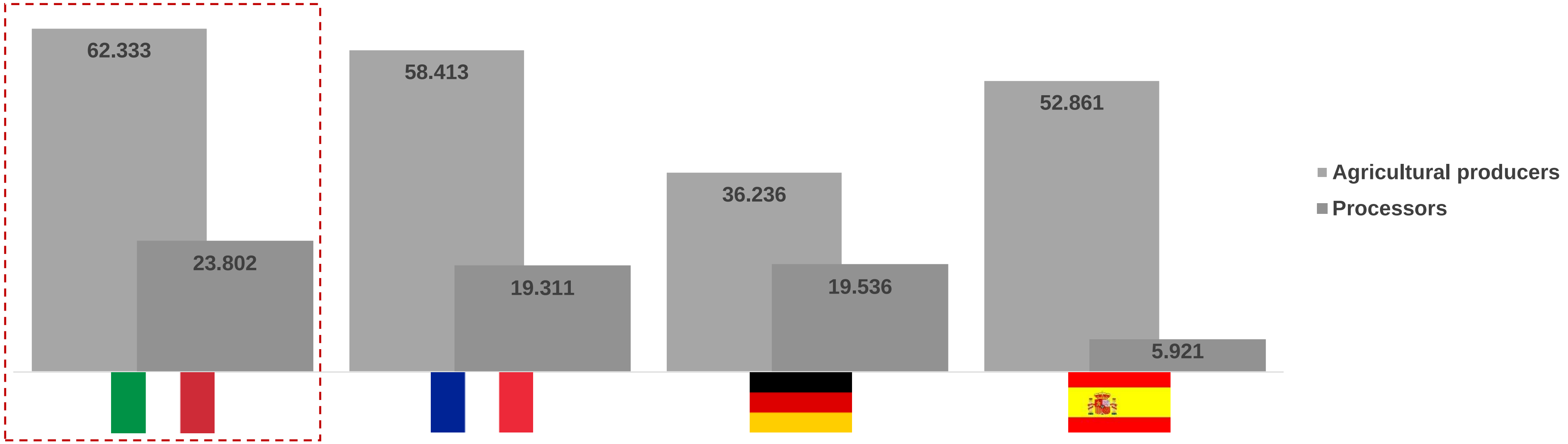
Sources: Ismea

SUSTAINABLE AND COMPETITIVE ORGANIC AGRICULTURE

In 2021, the Italian organic market boasts a market value of € 3.96 billion, positioning itself as one of the most significant markets within the European Union.

- 16.7% of the Italian agricultural area is dedicated to organic crops, outpacing other notable EU players such as Spain (10.8%), Germany (10.8%), and France (9.6%).
- Additionally, Italy boasts the highest number of organic operators (86.144), particularly producers and processors, among EU countries.

ORGANIC PRODUCERS AND PROCESSORS IN SELECTED COUNTRIES - 2021



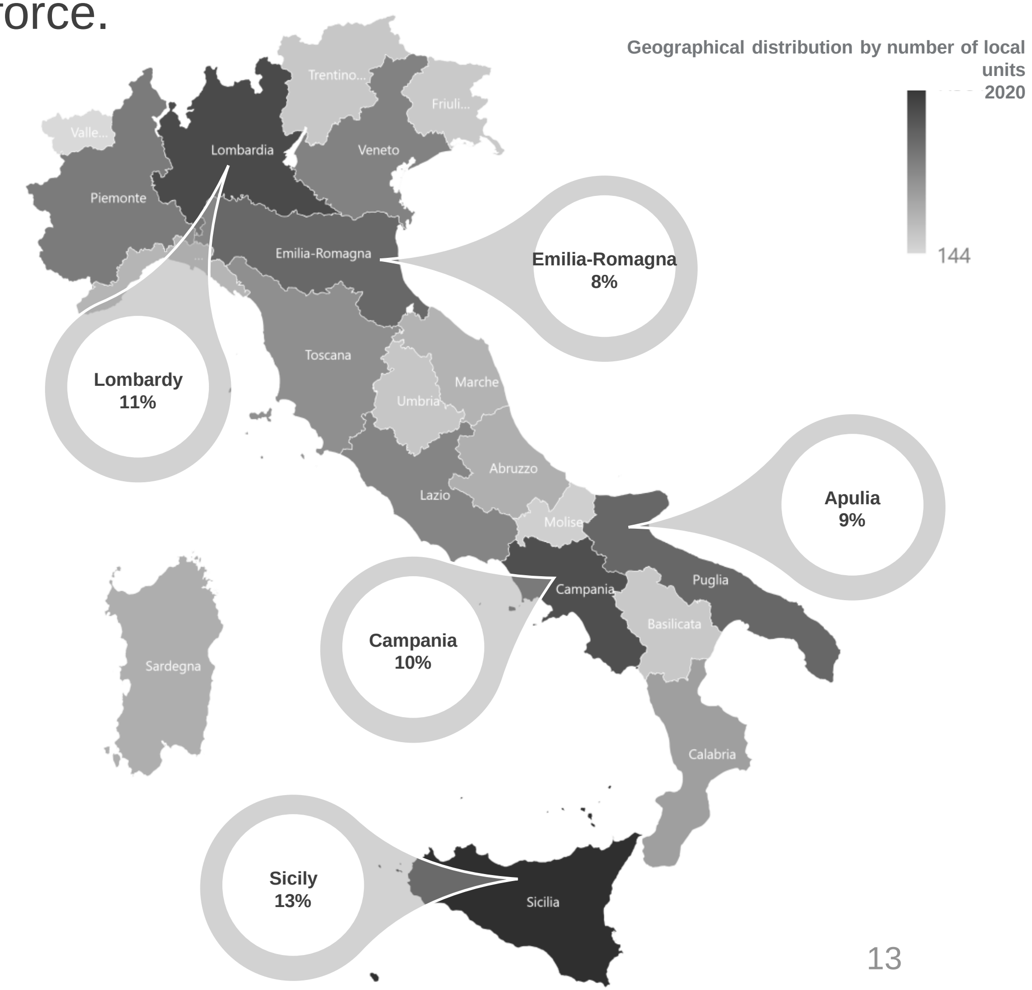
**Organic Operators includes Agricultural producers, Aquaculture producers, Processors, Importers and Exporters*

Sources: Sinab; FiBL & IFOAM; Eurostat

FOOD&BEVERAGE MANUFACTURING EXPERTISE

Italy is home to a thriving network of enterprises that specialize in Food & Beverage manufacturing. With an extensive presence across the country, this network boasts one of the most robust and dynamic industrial bases in Europe, supported by a highly skilled and capable workforce.

Regions by number of local units	Manufacture of food products (C 10)		Manufacture of beverages (C 11)		TOTAL LOCAL UNITS	TOTAL EMPLOYEES
	Local Units	Employees	Local Units	Employees		
Sicily	**7.196**	**26.591**	**385**	**2.537**	**7.581**	**29.129**
Lombardy	**6.023**	**64.413**	**368**	**6.647**	**6.391**	**71.061**
Campania	**5.851**	**34.939**	**316**	**1.772**	**6.167**	**36.711**
Apulia	**4.742**	**26.812**	**411**	**2.683**	**5.153**	**29.495**
Emilia-Romagna	**4.854**	**58.409**	**221**	**2.943**	**5.075**	**61.352**
Piedmont	3.867	33.323	394	4.590	4.261	37.913
Veneto	3.489	41.089	441	7.660	3.930	48.749
Lazio	3.685	20.174	153	1.249	3.838	21.423
Tuscany	3.184	20.861	189	1.768	3.373	22.629
Calabria	2.562	8.754	109	443	2.671	9.197
Sardinia	1.859	9.231	159	1.052	2.018	10.283
Abruzzo	1.824	11.350	164	1.319	1.988	12.669
Marche	1.706	11.321	111	705	1.817	12.026
Liguria	1.665	9.445	46	140	1.711	9.586
Umbria	894	7.858	60	626	954	8.484
Basilicata	833	4.076	57	433	890	4.508
Friuli-Venezia Giulia	754	7.465	89	730	843	8.194
Molise	547	2.606	25	132	572	2.738
Autonomous Province of Bolzano	370	7.054	88	1.144	458	8.198
Autonomous Province of Trento	343	4.093	110	1.262	453	5.355
Valle d'Aosta	125	753	19	248	144	1.001
TOTAL ITALY	56.373	410.616	3.915	40.084	60.288	450.700



Local units are facilities through which a company operates in addition to its headquarters.

Sources: : I.stat NACE Rev2 code C 10 Manufacture of food products , 11 Manufacture of beverages

HIGHLY SPECIALIZED CLUSTERS AND DISTRICTS

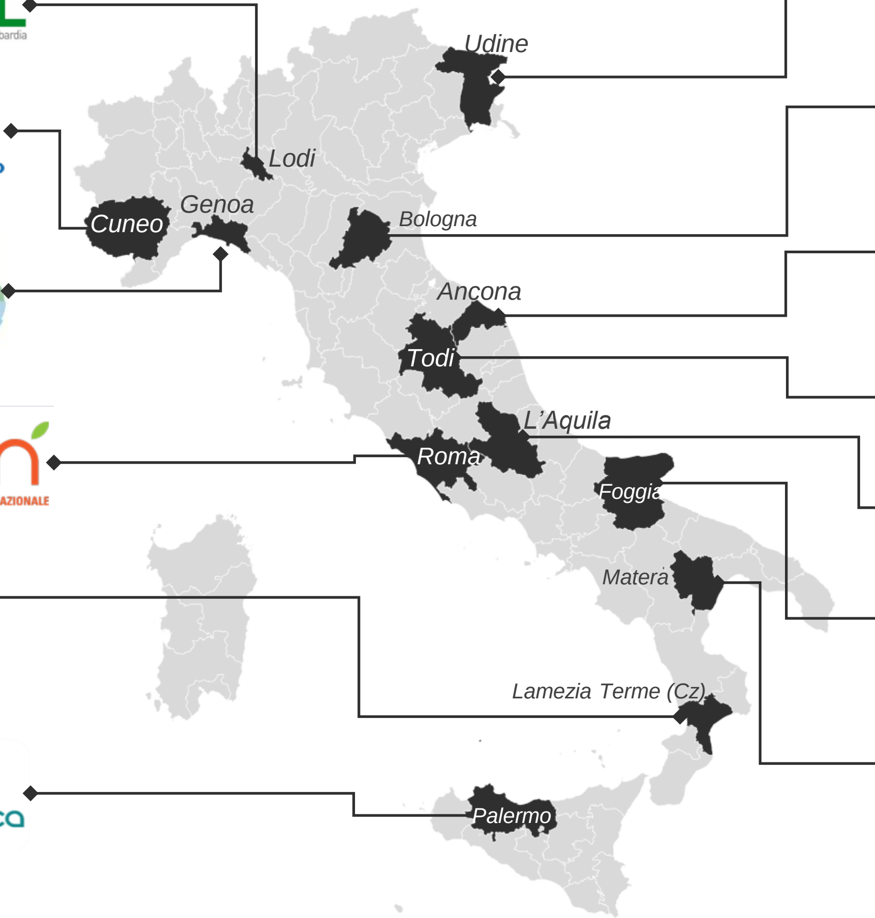
Italian Food Industries relies on specialized industrial clusters and consortiums, which provide a unified identity, reinforce enterprises' market positioning, and foster industry growth. Therefore, offering international players the opportunity to locate their businesses at the heart of a dynamic and competitive environment.

The National Agrifood Technology Cluster (C.L.A.N.)

The National Agrifood Technology Cluster comprises a broad spectrum of enterprises, regional representatives, and stakeholders that operate across the agri-food supply chain.

Established in 2013, the Cluster has become the primary point of contact for national and European institutions dedicated to the development of the sector.

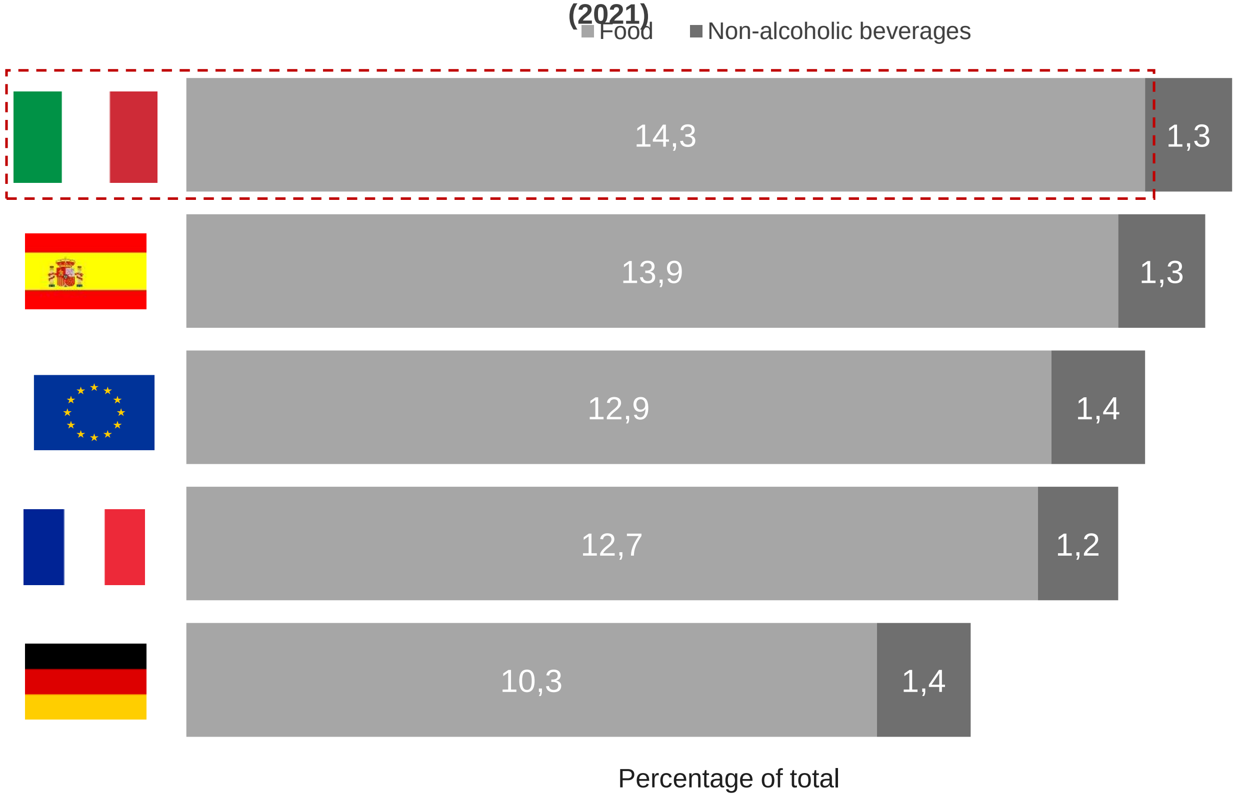
Currently, the Cluster has 112 parties associated with it, including large corporations, SMEs, universities, R&D centers, business associations, technological districts, and other stakeholders.



HOUSEHOLD'S CONSUMPTION EXPENDITURE

The expenditure of households in Italy on Food and Non-alcoholic Beverages exceeds the European Union's average and is the highest among other western European economies.

FINAL CONSUMPTION EXPENDITURE OF HOUSEHOLDS BY CONSUMPTION PURPOSE (2021)



2.437€/month

Italian Households average monthly expenditure

469,91€/month

Italian Households average monthly expenditure in Food & Non-alcoholic Beverages

AVERAGE MONTHLY SPENDING BY FOOD CATEGORY

Meat
100,14 euro

Bread and cereal products
76,72 euro

Fruits and vegetables
64,81 euro

Milk, cheese and eggs
60,38 euro

Fish and seafood
43,05 euro

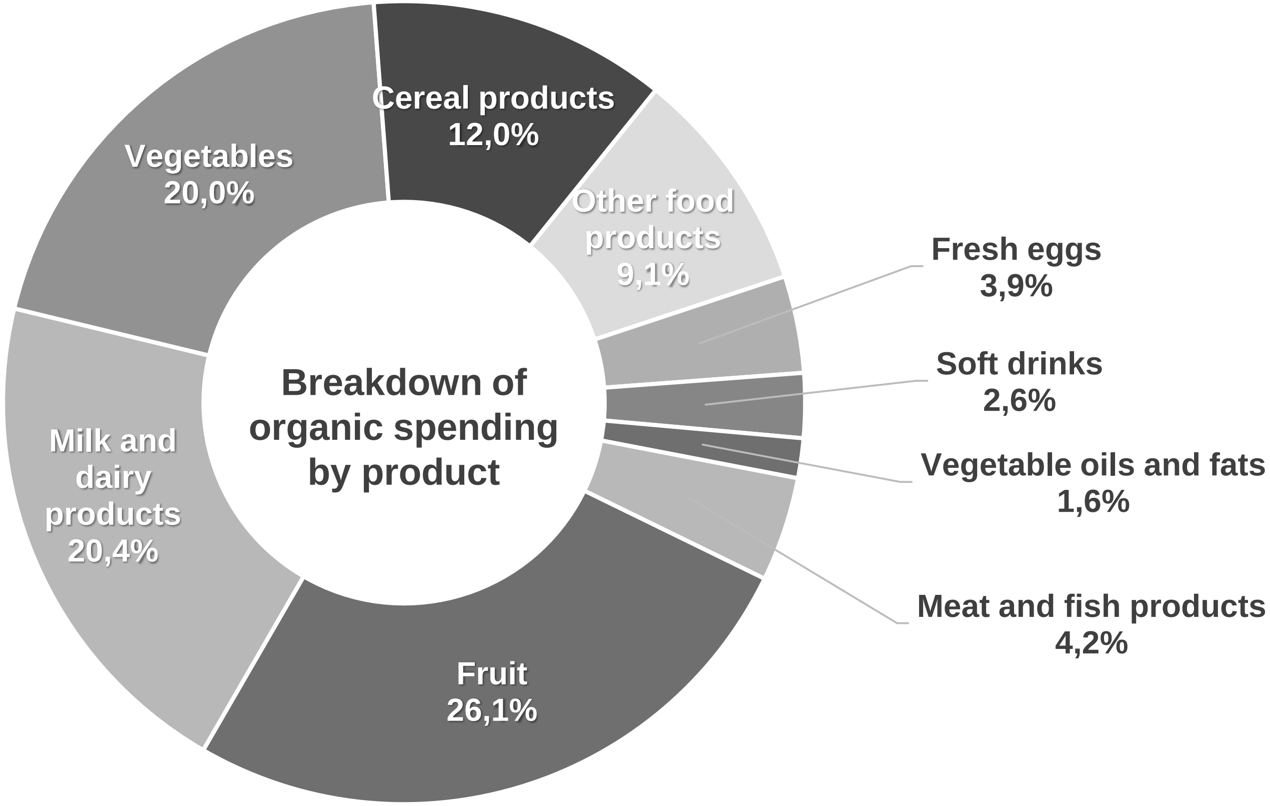
Sources: Crea, Eurostat

ORGANIC PRODUCTS CONSUMPTION

In Italy, the consumption of organic food products accounts for a significant portion of the total Food and Beverage national consumption, representing 3.9% of the market and boasting a domestic market value of over 3.38 billion euros in the year 2021.

Fruit and vegetables remains the most represented product (46,1%)

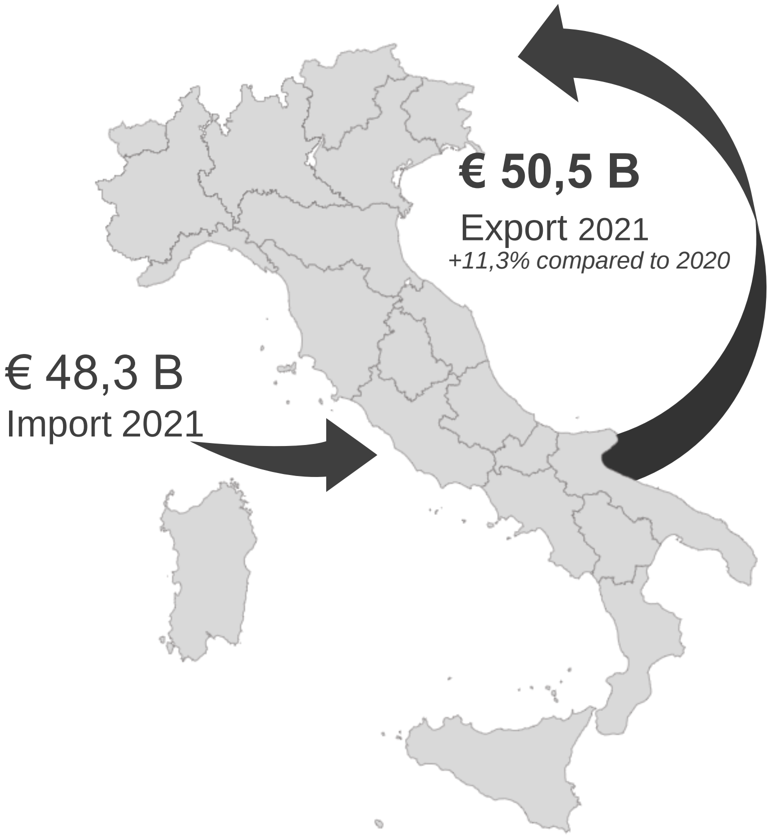
The primary distribution channels for organic food products in Italy consist of modern retail stores, discount markets, and various traditional



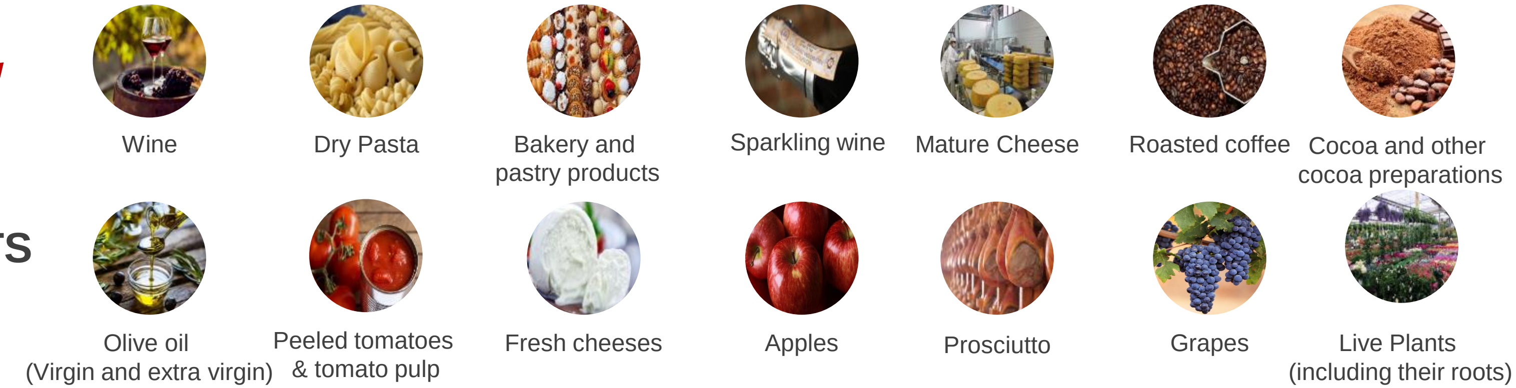
Sources: Sinab

RECOGNIZED AGRIFOOD EXCELLENCE WORLDWIDE (1/2)

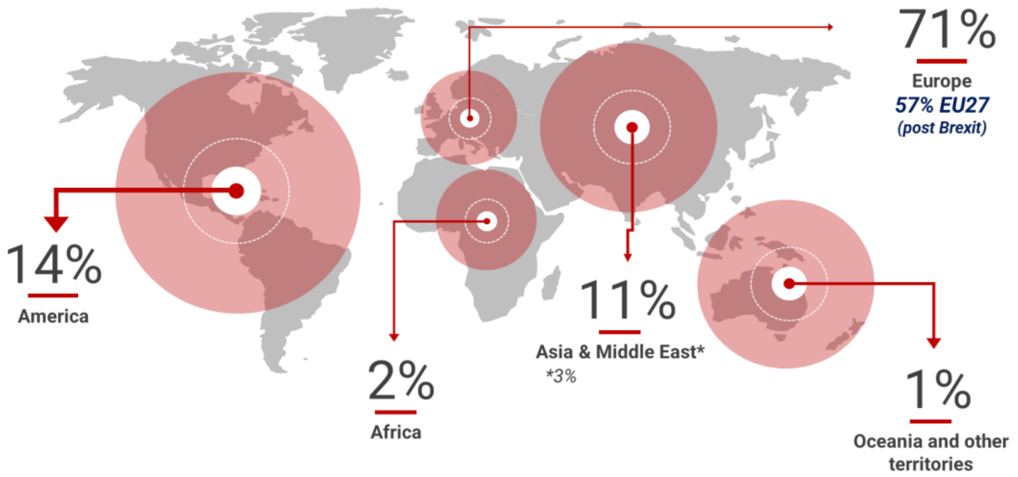
Italian products are in high demand worldwide, thanks to the extensive recognition of the Made in Italy brand, which guarantees high-quality, safety, and prestige.
Furthermore, Italian enterprises often act as sourcing units, providing world-class raw materials to large foreign importers, ensuring the continued excellence of Italian products.



MAIN EXPORTS



MAIN DESTINATION MARKETS



Agricultural products

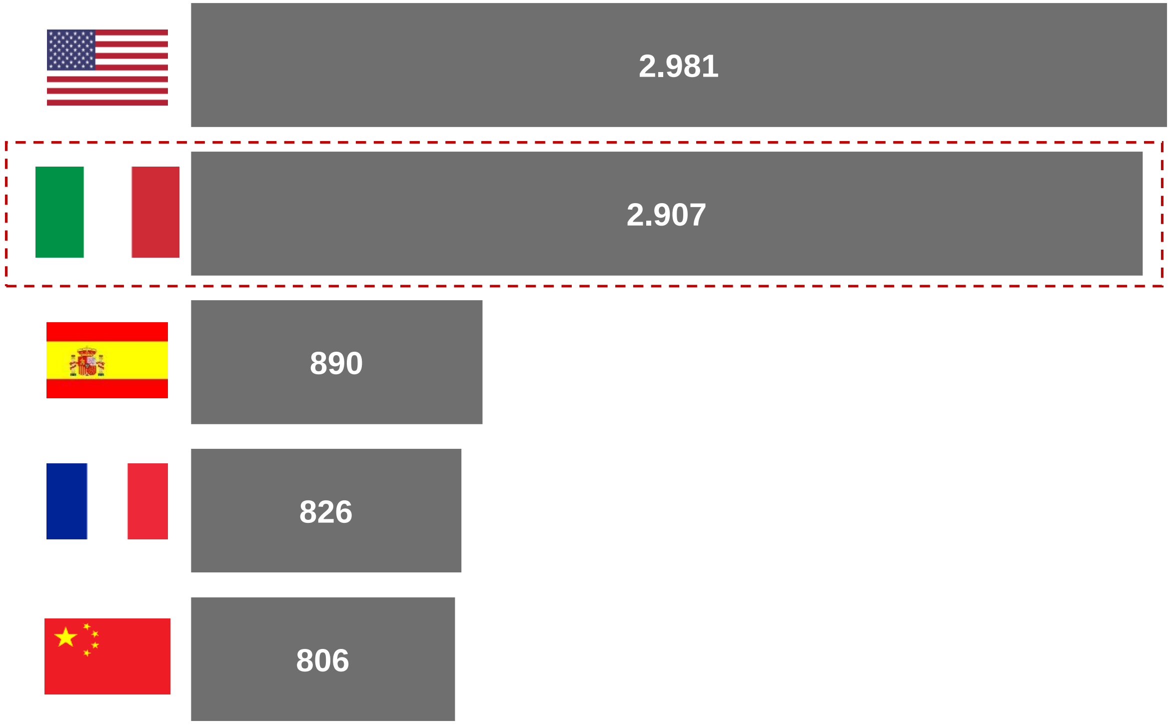
Food & Beverage products

Sources: Crea, Ismea, Coeweb.Istat

RECOGNIZED AGRIFOOD EXCELLENCE WORLDWIDE (2/2)

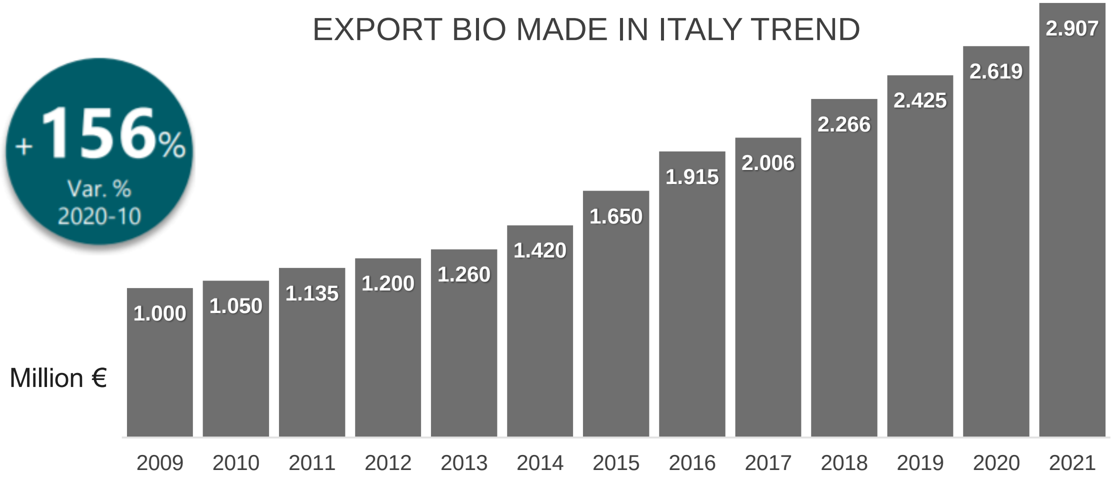
As of 2021, Made in Italy organic products registered an export value of €2.9 billion, confirming the Italian absolute leadership in Europe and positioning the country as the 2° top exporter of organic products worldwide.

TOP EXPORTERS OF ORGANIC PRODUCTS WORLDWIDE.



- As of 2020, Made in Italy organic products accounted for 69% of total PDO and PGI exports and 42% of total wine exports
- From 2010 to 2021 exports of Italian organic products have steadily increased over +156%.

EXPORT BIO MADE IN ITALY TREND



Sources: SINAB Sistema d'informazione Nazionale sull'Agricoltura Biologica

ITALIAN EXCELLENCE IN FOOD&BEVERAGE PRODUCTION AND PROCESSING

VAST HIGH-QUALITY AGRICULTURAL PRODUCTION (1/2)

Italy, homeland to the Mediterranean diet, is one of the largest producers of high-quality fruits and vegetables worldwide. Production, far from being focused on just one type of product, is characterized by a wide variety of crops that suit every taste and nutritional requirement.
Italy is the EU leading producer of +40 agricultural products.

1°in EU

Total 14
First positions

Over countries such as

SPAIN FRANCE NETHERLANDS

Sources: Edison Foundation

VAST HIGH-QUALITY AGRICULTURAL PRODUCTION (2/2)

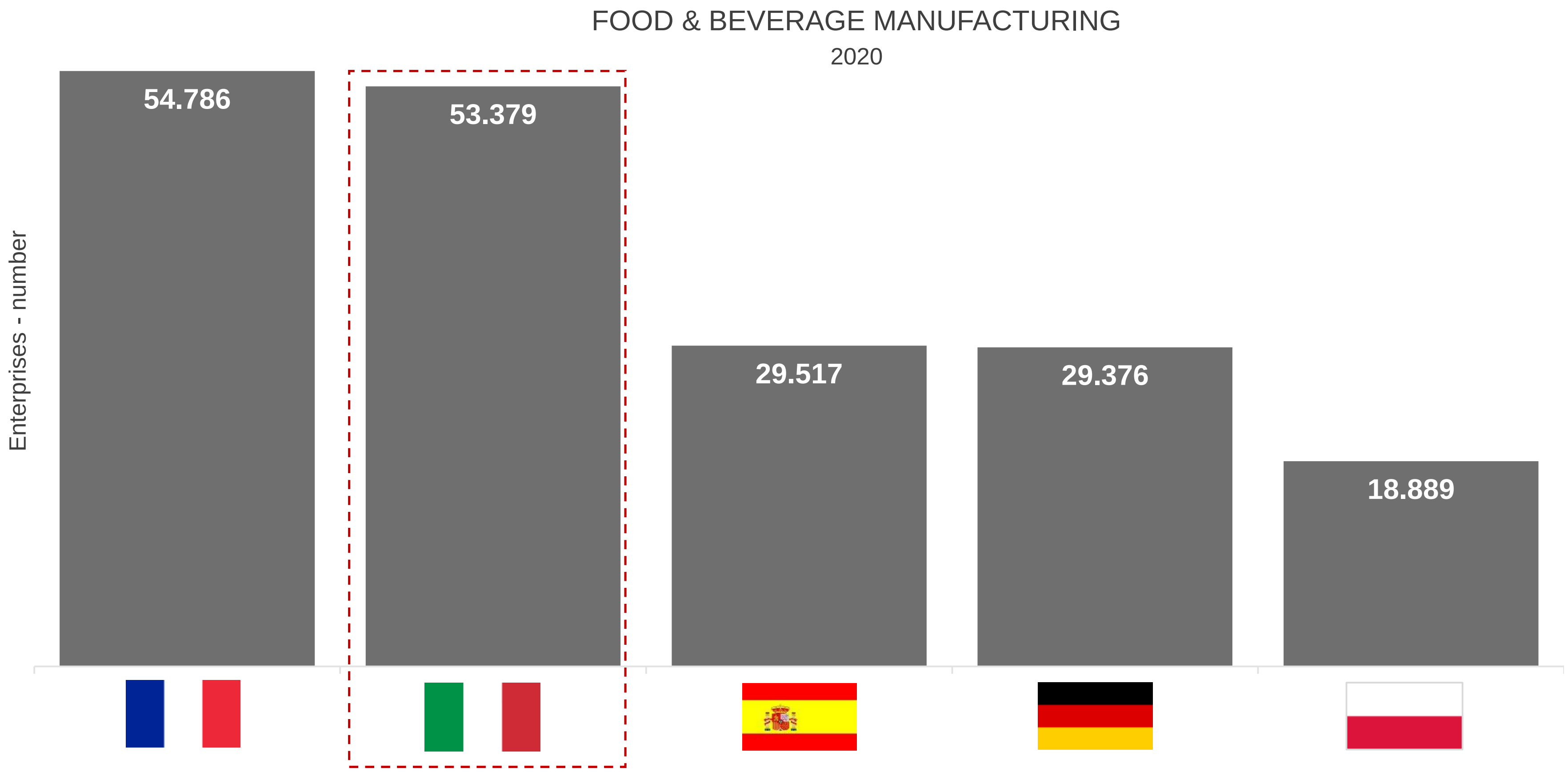
2°in EU Total 17 Second positions

3°in EU Total 8 Third positions

Sources: Edison Foundation

CONSOLIDATED MANUFACTURING EXPERTISE (1/2)

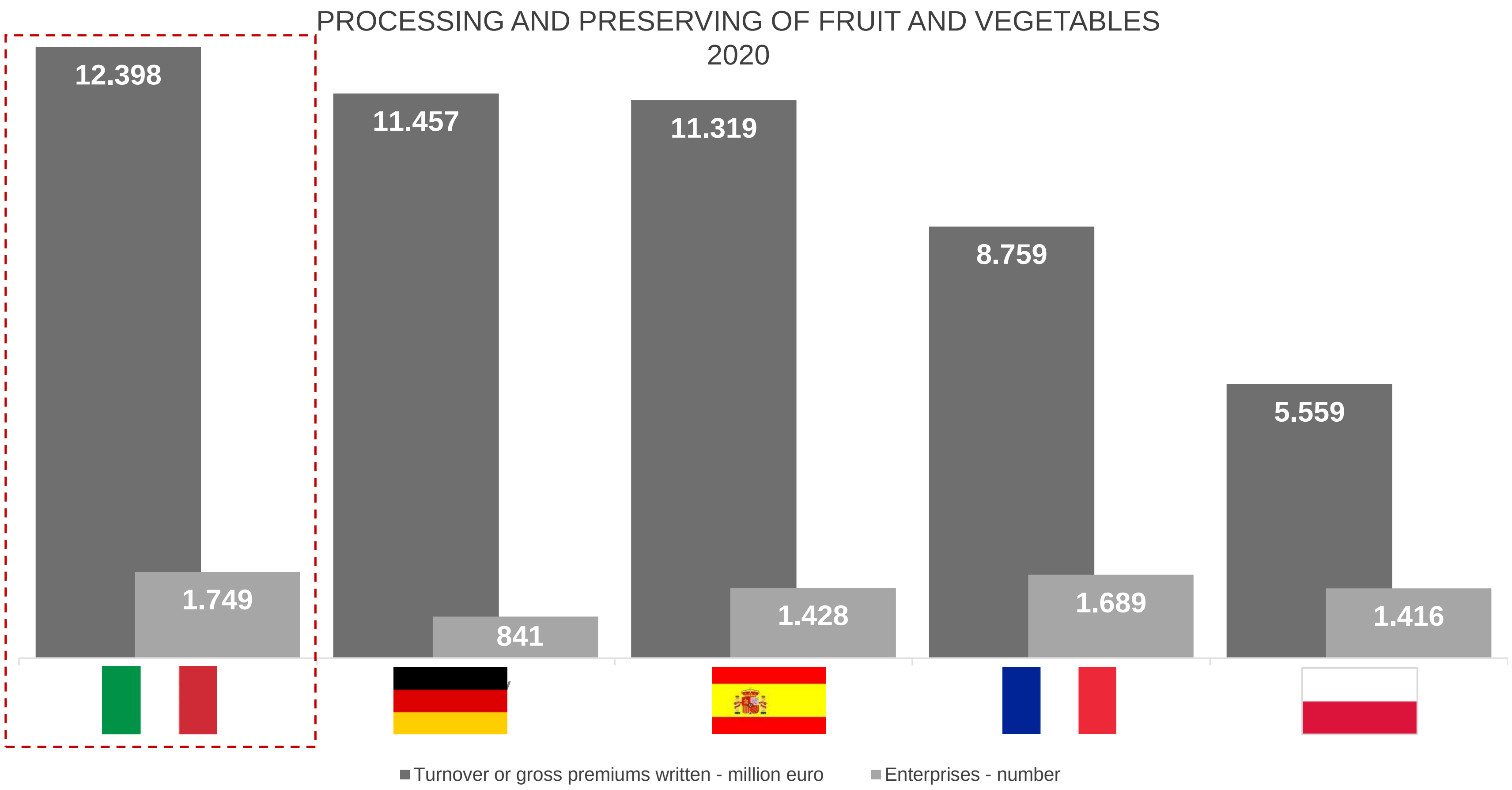
Boasting world-class entrepreneurship, Italy ranks 2nd in the EU with one of the most extensive industrial base of enterprises specialized in Food&Beverage manufacturing.



Sources: Eurostat [sbs_na_ind_r2], NACE Rev2 code C 10 Manufacture of food products, 11 Manufacture of beverages;

CONSOLIDATED MANUFACTURING EXPERTISE (2/2)

As of 2020, Italy leads the European fruit and vegetable processing and preserving industry, boasting the highest turnover and consolidated manufacturing expertise with +1.700 specialized enterprises.



Sources: Eurostat [sbs_na_ind_r2], NACE Rev2 code C 10.3 Processing and preserving of fruit and vegetables

ITALY IS HOME TO KEY INTERNATIONAL PLAYERS

Present in italy since 1927, currently operates through three companies (Coca-Cola Italy, Coca-Cola HBC Italy and Sibeg)

- » **Revenue**
  - ▪ *Coca-cola Hbc Italia Srl.* : € 936.49 M (2021)
  - ▪ *Coca-cola Italia Srl*: €66.76 M (2021)
- » **Employees**: over 2.400
- » **Location**: Nogara (VR), Oricola (AQ), Marcianise (CE) and Catania (production of soft drinks) and Rionero In Vulture (PZ) (production of mineral water)
- » **Main activities**: Produces and sells concentrates, beverage preparations and syrups for bottling activities.

Nestlé group has been present in Italy for more than 100 years, since 1875. Italy represents the ninth world market for Nestlé in terms of turnover.

- » **Revenue**: € 842 M (2021)
- » **Employees**: 2.101 (2023)
- » **Location**: 10 plants spread throughout the country (in addition to the headquarters of Assago) Nestlé Italiana, Sanpellegrino - Nestlé Waters, Purina, Nestlé Professional, Nestlé Nutrition, Nestlé Health Science, Cpw (Cereal Partner Worldwide) and Nespresso.
- » **Main activities**: confectionery and ice-cream, culinary products, beverage preparations, milk products and products intended for early childhood, clinical nutrition products and petcare products.

Heineken has been producing beer in Italy for over 40 years, through its four breweries and a distribution network in the beverage sector.

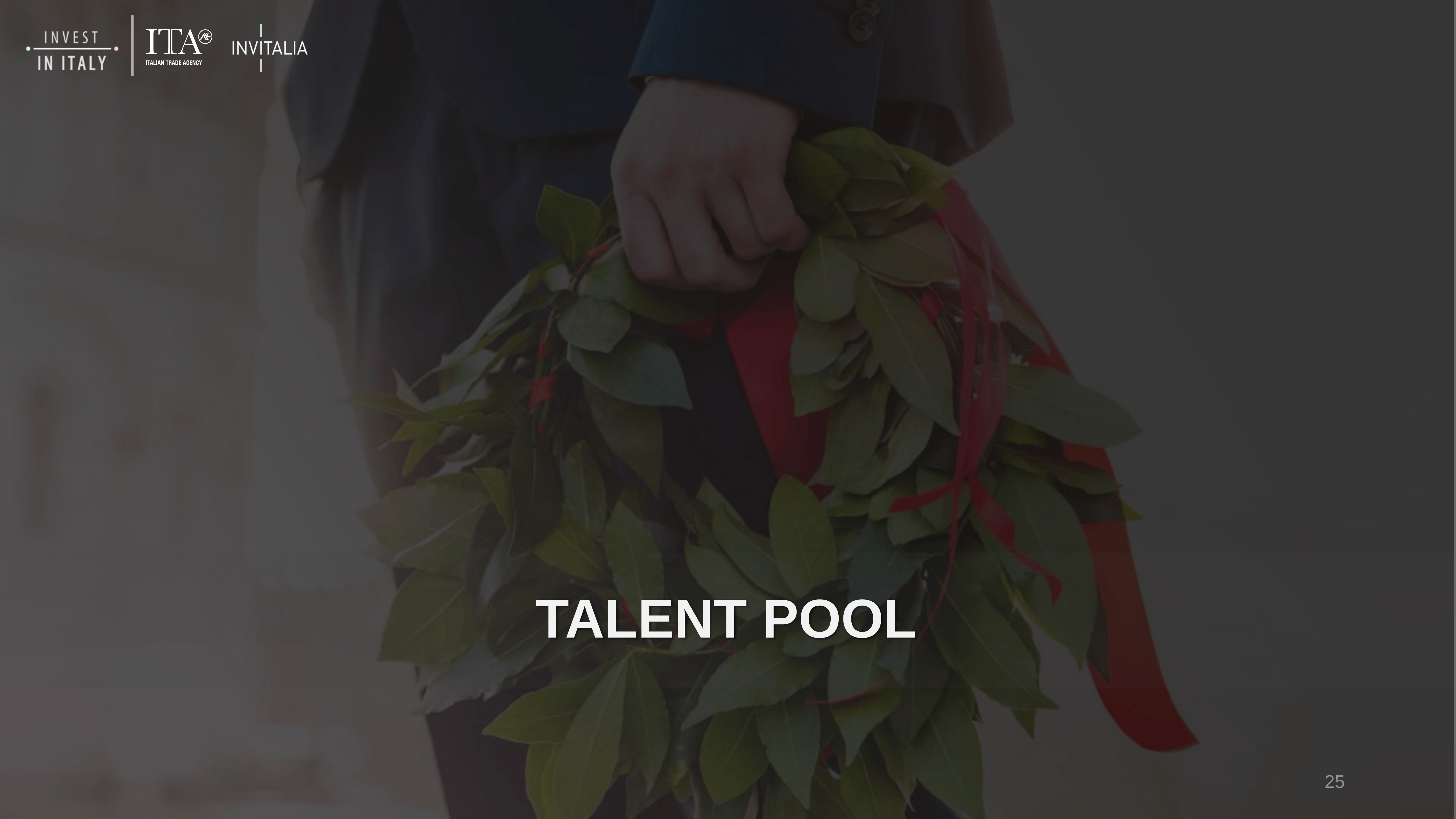
- » **Revenue**: € 678.82 M (2021)
- » **Employees**: 1.095 (2023)
- » **Location**: There are four breweries in the country: Comun Nuovo (BG), Pollein (AO), Massafra (TA) And Assemini (CA).
- » **Main activities**: The group's leading brands in Italy are Heineken, Birra Moretti, Dreher and Ichnusa. In Italy, the group also includes Dibevit Import, a company working in import and distribution of speciality beers worldwide.

Mars has been in Italy since 1966, thanks to the creation of two separate companies: Mars Italia S.p.A., for the distribution of confectionery products, and Petfood Italia S.p.A., for animal food, which were then merged in 1978.

- » **Revenue**: € 306.79 M (2021)
- » **Employees**: *185 (2023)*
- » **Location**: Assago, Milano
- » **Main activities**: Among the Mars brands distributed in Italy: Petcare - Pedigree, Whiskas, Cesar, Sheba, Kitekat, Greenies; Chocolate - M&M'S, Snickers, Mars, Twix; Wrigley - chewing gum: Extra; Confections - Skittles; Food - Uncle Bens's and Suzi Wan - and the new range of healthy Be-kind dried fruit snacks.

Pepsico begins its history in the Italian market in the '60s producing the first bottle of Pepsi-Cola in 1962 at the factory in Scorzè.

- » **Revenue**: € 138.3 M (2021)
- » **Employees**: 226 (2023)
- » **Location**: Milano (ML) and Scorzè (VN)
- » **Main activities**: Pepsico Italia operates mainly in the soft drinks sector, in carbonated drinks, particularly with the brand Pepsi, Gatorade, Tropicana fruit juice and Lipton iced tea. Since January 2011, it has also been distributing Looza juices exclusively in the Ho.Re.Ca market. Since 2014 it also distributes in Italy the brand of chips Lay's.



TALENT POOL

ACADEMIC EXPERTISE & TALENT POOL

In Italy, there is a flourishing talent pool of highly qualified professionals ready to contribute to the development and technological transformation of the Italian Agri-food industry.

Over 40 universities in the country offer bachelor and postgraduate degrees in Agri-food Sciences and related fields.

61,986 Graduates between 2018-2021

74,629 Students Enrolled in 2021 - 2022 academic year

SHANGHAI RANKING World Rank	**University of Naples - Federico II** *Naples, Campania*	**Università di Padova** *Padua, Veneto*	**Sapienza University of Rome** *Rome, Lazio*	**University of Milan** *Milan, Lombardy*	**University of Bologna** *Bologna, Emilia-Romagna*
	TOP 51-75 in Agricultural Sciences	**TOP 44** in Agricultural Sciences 1	**TOP 301-400** in Agricultural Sciences	**TOP 51-75** in Agricultural Sciences	**TOP 76-100** in Agricultural Sciences
	TOP 33 in Food Science and Technology 1	**TOP 101-150** in Food Science & Technology	**TOP 151-200** in Food Science and Technology	**TOP 46** in Food Science and Technology	**TOP 36** in Food Science and Technology
	TOP 101-150 in Biotechnology 1	**TOP 151-200** in Biotechnology	**TOP 201-300** in Biotechnology	**TOP 151-200** in Biotechnology	**TOP 151-200** in Biotechnology
	TOP 151-200 in Automation & control	**TOP 51 - 75** in Automation & control	**TOP 28** in Automation & control 1	**TOP 29** in Automation & control	**TOP 101-150** in Automation & control

Sources: Ministry of University and Research, Shanghai Ranking's Global Ranking of Academic Subjects 2022

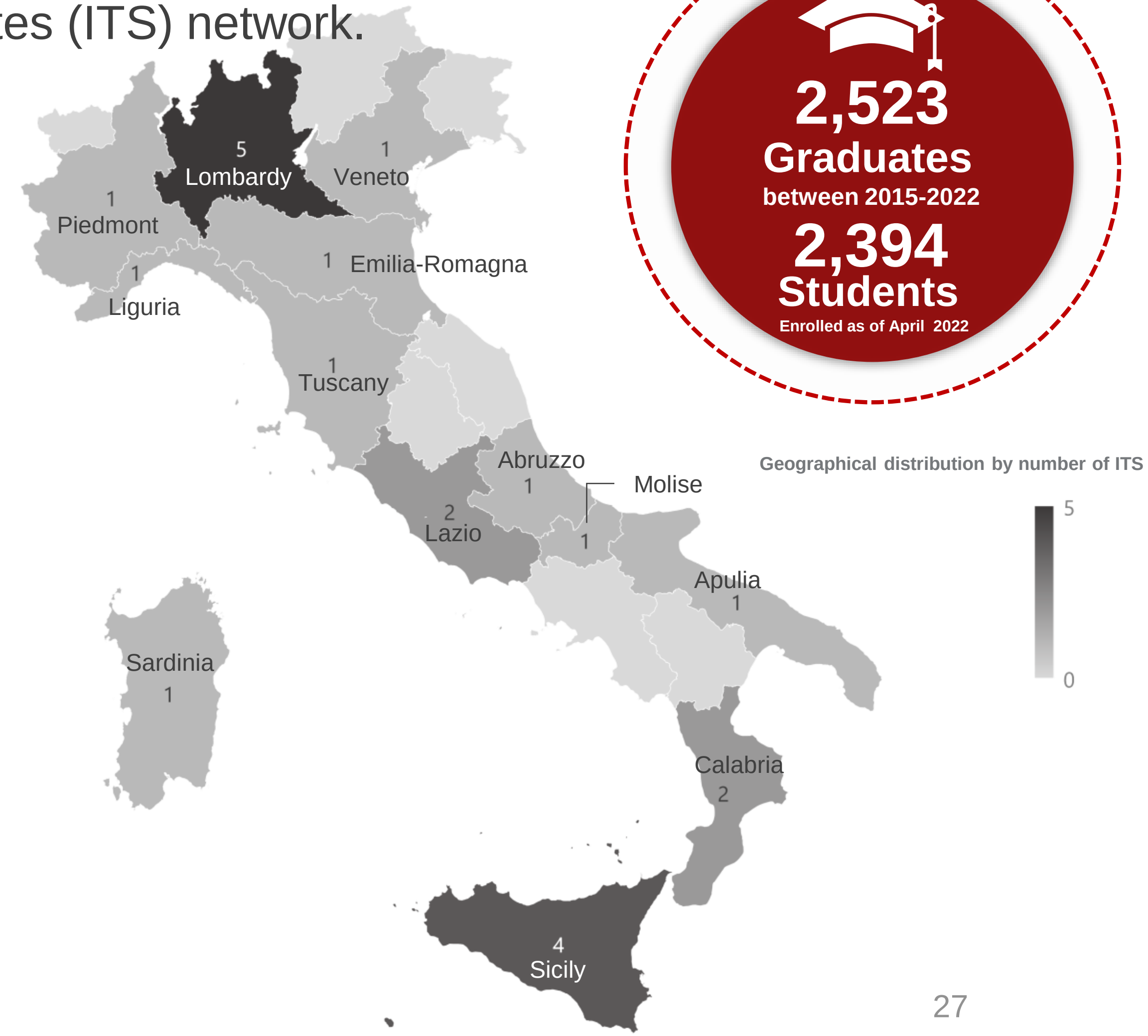
HIGHER TECHNICAL INSTITUTES

The Italian talent pool of highly-skilled professionals specialized in the Agri-food industry is further nurtured by the 22 specialized Higher Technical Institutes (ITS) network.

- Higher Technical Institutes (ITS) offer non-university tertiary level education, leading toward a European Qualifications Framework 5th level degree.
- The ITSs reconcile technical skills, culture, theory, and practice, portraying a formidable Passepartout to the labor market. The ITSs offer students the opportunity to experience firsthand theoretical concepts by combining education with business contexts.
- ITS for agri-food systems focuses on the organization, management, and quality control of the supply chain as well as agri-food products and goods production and improvement. Moreover, the educational program seeks to promote techniques for adopting good practices to mitigate the effects of climate change.

2,523 Graduates
between 2015-2022

2,394 Students
Enrolled as of April 2022

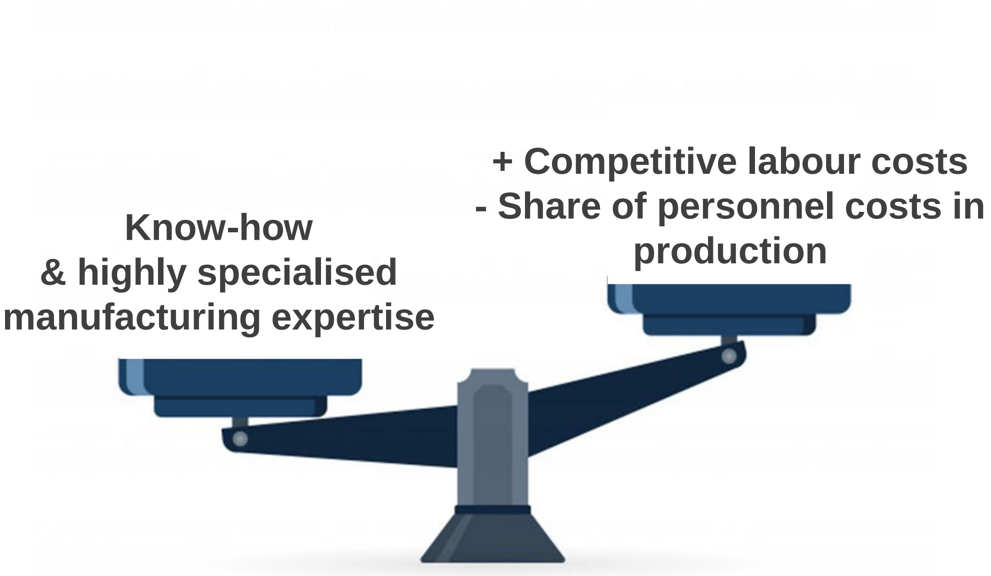


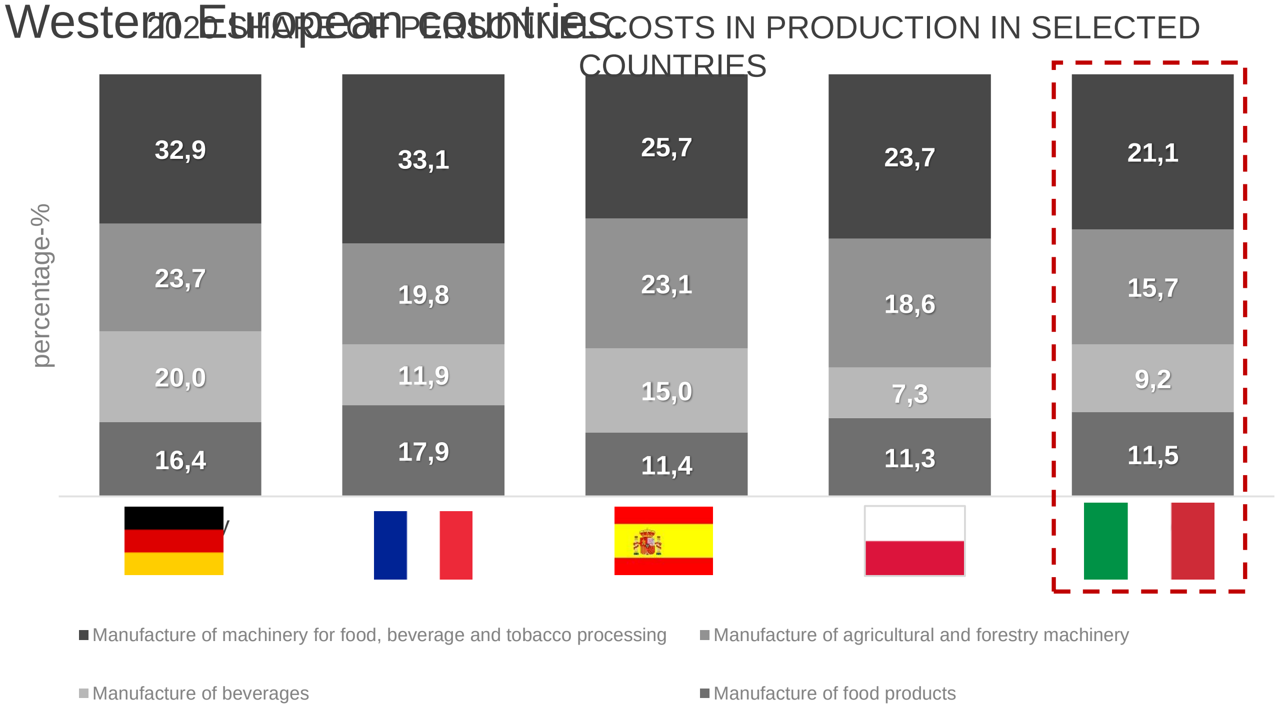
Sources: Istituto Nazionale di Documentazione, Innovazione e Ricerca Educativa (Indire)

PREMIUM EXPERTISE AT RELIABLE, COMPETITIVE COSTS

Italy boasts competitive labor costs compared to other Western European countries.
The labor cost per hour in Italy (€28,6) is lower than in France (€39,8) and lower than in Germany (€41,9)*.

Moreover, Italy has one of the lowest overall shares of personnel costs** in manufacturing activities related to the Agri-food industry compared to other Western European countries.





Sources: Eurostat *Dataset Labour cost levels [LC_LCI_LEV] by NACE Rev. 2 – C Manufacturing
**Dataset Annual detailed enterprise statistics for industry [sbs_na_ind_r2] NACE Rev.2 C10 Manufacture of food products; C11 Manufacture of beverages; C28.3 Manufacture of agricultural and forestry; C28.93 Manufacture of machinery for food, beverage and tobacco processing machinery

BUSINESS DEVELOPMENT & SETTLEMENT OPPORTUNITIES

BUSINESS DEVELOPMENT & SETTLEMENT OPPORTUNITIES

Thanks to its vast high-quality agricultural production potential and wide availability of greenfield and brownfield areas, Italy offers multiple opportunities for investment projects throughout the Agri-food value chain.

- Large availability of agricultural land areas characterized by territorial and climatic diversity with high fertility degree and all the advantages of the Mediterranean area, making Italy the ideal place to grow all kinds of crops
- Largest number of *Protected Designation Of Origin* and a *Protected Geographical Indication* recognized by the EU available to back up your brand or upgrade your private label with the Made in Italy exclusive premium products.
- Specialization in agricultural production of vegetables and legumes as well as fruits and citrus.
- Increasing global demand of high-quality organic food.
- Reinforce and/or enrich produce, flavor and ingredients portfolio, positioning businesses at the top of the global market value chain, endorsing trademarks with the Made In Italy brand's exclusiveness.

- Widespread availability of high-quality and high-quantity premium primary matter, offering multiple opportunities to take advantage of current agricultural produce surplus and contribute to food waste reduction.
- Long-lasting food&beverage processing and preserving expertise and know-how.
- Extensive upmarket and highly specialized enterprises network covering the whole supply chain.
- Settlement opportunities within dynamic and highly specialized industrial clusters.
- Increasing local and international demand of plant-based agri-food products.
- Made in Italy brand global recognition as a synonym for excellence, high quality, safety and exclusiveness.

- High demand of solutions guarantee cold chain and keep quality & safety standards (HACCP).
- Advantageous strategic geopolitical location: in the heart of Europe and at the center of the Mediterranean region, which reinforces its position as a trade and logistics hub in the EMEA market.
- Italian AgriFood and Pharma sector in continuous growth, with new market trends and high request refrigerated warehouses in the Italian Ports and Freightvillages.

JOIN

Nestlé · Barilla (The Italian Food Company. Since 1877.) · Heineken · Coca-Cola · Unilever · FERRERO · PEPSICO · syngenta

AREA FOR F&B MANUFACTURING IN CAMPANIA

MAIN FEAUTERS OF THE AREA

PROVINCE: **BENEVENTO**
Ponte Valentino Industrial Zone

- **Available sites:** 2
- **Coverage index:** to be confirmed
- **Type of investment:** Greenfield
- **Costs:** €/sqm to be confirmed

MAIN INDUSTRIAL SPECIALIZATIONS:

- Agri-food
- Textile
- Manufacturing
- Aerospace
- Transport & Logistics

DISTANCES FROM MAIN LOGISTIC NODES (KM)

- Naples International Airport - 93 km
- Naples Port – 100 km
- Freight village of Nola: 78,8 km
- Freight village of Marcianise- Maddaloni: 102 km
- Benevento central train station – 8,1 km
- Benevento city centre – 6 km
- Naples city centre – 98 km

- THIS ARE A DIVISIBLE AREAS, it is possible to choose and design within these industrial areas a plot according to specific needs

1 **Total Surface area:** 40.000 sqm
*AREA SEZ**

2 **Total Surface area:** 6.720 sqm

*ZES: Zona Economica Speciale (Special Economic Zone)

AREA FOR F&B MANUFACTURING IN ABRUZZO

MAIN FEAUTERS OF THE AREA

PROVINCE: **L'AQUILA**
Industrial zone of Bazzano

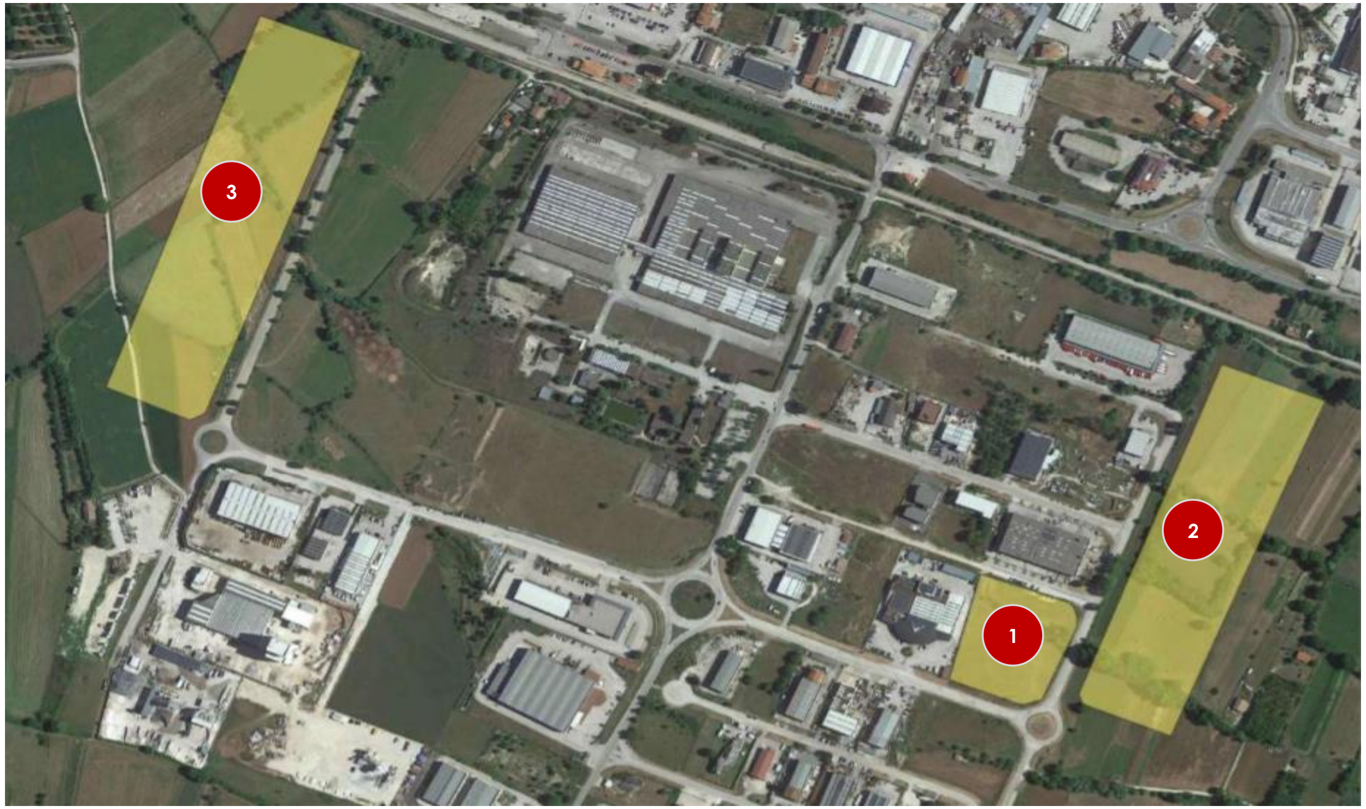
- **Settled enterprises:** 90
- **Available sites:** 3
- **Coverage index:** 40-60%
- **Type of investment:** Greenfield
- **Costs:** €32,30/sqm

MAIN INDUSTRIAL SPECIALIZATIONS:

- Heavy mechanical engineering
- Automotive
- Agri-food
- Furniture and wood
- Textile

DISTANCES FROM MAIN LOGISTIC NODES (KM)

- Airport of Rome (Fiumicino): 151
- Airport of Pescara: 97
- Train station of Paganica: 0,1
- Train station of Avezzano: 50
- Port of Ortona: 125
- Port of Pescara: 104



- Total Surface area: 86.000 sqm

1 **Surface area:** 10.500 sqm

2 **Surface area:** 37.500 sqm

3 **Surface area:** 38.000 sqm

AREA FOR F&B MANUFACTURING IN APULIA

MAIN FEAUTERS OF THE AREA

PROVINCE: **BARI**
Bari Modugno Industrial Park
*AREA SEZ**

- **Settled enterprises:** +1,000
- **Available sites:** 1
- **Coverage index:** 50%
- **Type of investment:** Greenfield
- **Costs: To be confirmed** €/sqm

MAIN INDUSTRIAL SPECIALIZATIONS:

- Chemical Industry
- Agri-food
- Energy
- ICT
- Wood-furniture
- Transport & Logistics

DISTANCES FROM MAIN LOGISTIC NODES (KM)

- Bari Port - 10.1 km
- Bari International Airport – 4 km
  Bari freight rail terminal – 4 km
- Bari central station – 12 km
- Bari city centre – 9,2 km

- THIS IS A DIVISIBLE AREA, it is possible to choose and design within this industrial area a plot according to specific needs

1 **Total Surface area:** 27.000 sqm

*ZES: Zona Economica Speciale (Special Economic Zone)

AREA FOR F&B MANUFACTURING IN FRIULI-VENEZIA GIULIA

MAIN FEAUTERS OF THE AREA

PROVINCE: **GORIZIA**
Industrial zone of Staranzano (Schiavetti-Brancolo)

- **Coverage index:** 50%
- **Type of investment:** Greenfield
- **Costs:** €40/sqm

MAIN INDUSTRIAL SPECIALIZATIONS:

- Logistics
- Heavy mechanical engineering
- Electro-Mechanical
- Other manufacturing activities

DISTANCES FROM MAIN LOGISTIC NODES (KM)

- Train station of Ronchi dei Legionari Sud: 7
- Train station of Monfalcone : 3
- Freight Village / Trieste Airport: 4
- Freight village of Monfalcone : 2
- Freight village of Gorizia: 20
- Freight village of Fernetti (Trieste): 30

1 **Surface area:** .
68.782 sqm

MAIN INCENTIVE SCHEMES MANAGED BY INVITALIA

The **Development Contract** consists of incentives for **one or more connected and functional investment projects** (including **R&D**) of **at least € 20 mln over 3 years**, presented by one or more companies also in joint form.

The measure consists of a combination of **non-repayable grants and soft loans**. The effective mix of the funds granted can't exceed **75% of the total eligible expenses**.

CONTRATTO DI SVILUPPO

Investment type	Minimum investment required	Access procedure
Manufacturing (including linked R&D investment)	≥ € 20 MLN	Ordinary
	≥ € 50 MLN	Fast track
Agrifood (First-stage processing of agricultural products)	≥ € 7.5 MLN	Ordinary
	≥ € 20 MLN	Fast track

As per the agricultural products and commercialization, is possible to activate a development contract for investment projects of at least € 7.5 MLN over 3 years, presented by one or more companies also in joint form.

Projects must be focus on the first processing of agricultural products, meaning any treatment of an agricultural product in which the "final" product obtained is still an agricultural product (except for agricultural activities necessary for the preparation of an animal or vegetable product for the first sale).

This is a non-exhaustive selection of incentive schemes. Aid intensities indicated may vary depending on location and enterprise size.

MAIN FISCAL AND EMPLOYMENT BENEFITS

TAX CREDIT FOR CAPITAL GOODS

Tax credit up to 20% is recognized to companies of all sizes investing in **new tangible and intangible capital goods 4.0 according to the Industry 4.0 national strategy.**
Companies that choose **Southern Italy** for an **initial investment** can benefit from a **tax credit up to 45%** for the purchase of **new capital goods**

TAX CREDIT FOR RESEARCH, DEVELOPMENT, INNOVATION & DESIGN

Companies of all size investing in **Research, Development, Innovation and Design** activities can benefit from a **tax credit equal to 10% in 2023** and 5% from 2024 (**up to 45% in Southern Italy**)

PATENT BOX

Total 210% deduction (normal 100% + an extra 110% deduction) **for R&D expenses** associated to qualified intangible assets, such as software protected by copyright, industrial patents, designs and models

EMPLOYMENT BONUSES

Reductions (**up to 100%**) **in social security contributions** which, by law, must be paid by employers. This financial support has the aim to encourage the hiring of **specific categories of people** (**including people under 36 and women**)

This is a non-exhaustive selection of fiscal benefits. Percentages indicated may vary depending on investment size and typology.

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Annex : Strategic Cross-sectoral Industry

LOGISTICS

The Italian AgriFood industry plays a key role in the logistics industry, acting as a driving force for businesses and calling for innovative solutions and services.
Currently, strengthening the logistics system is of utmost importance to enhance the industry's competitiveness and ensure better supervision and quality control during the transportation and storage of Food & Beverage products, especially in terms of maintaining the cold chain and achieving traceability.

TRANSPORTATION & STORAGE 2020 - NACE H		Sea & coastal freight water transport	Railway freight transport	Road freight transport	Air freight transport
€139.2 B	Turnover	4.5 B	546 M	47 B	508 M
€149.8 B	Production Value	4.9 B	626 M	49 B	524 M
€51.6 B	Value Added	1.2 B	178 M	14 B	158 M
146.191	Local Units	215	236	63.694	40
1.124.067	Workforce	8.105	5.180	344.959	664

39 MILLION TONNES - Y2021
Agricultural products, food&beverage products, and tobacco freight maritime transport loaded and unloaded
8% of total maritime freight transport loaded and unloaded goods

6 MILLION TONNES - Y2021
Agriculture, hunting, forestry and other fishing freight transported by rail
6% of total railway freight transport

3 MILLION TONNES - Y2021
Food, beverage and tobacco freight transported by rail
3% of total railway freight transport

62 MILLION TONNES - Y2021
Agriculture, hunting, forestry and other fishing freight transport by road
14% of total road freight transport

136 MILLION TONNES - Y2021
Food, beverage and tobacco freight transport by road
14% of total road freight transport

Sources: I.stat; Eurostat

LOGISTICS - *COLD CHAIN*

In Italy, the provision of logistics services dedicated to refrigerated and frozen products is a niche market occupied by highly-specialised companies

It is estimated that the market is operated by 46 major companies (i.E. Joint stock companies with annual turnover in excess of €10mn), with **7.295 employees**.

Growing demand for organized retail and growing awareness of consumers to reduce food waste are strongly driving the demand for cold chain logistics

THE FROZEN FOOD MARKET

As of 2021, the Italian frozen food market was worth €4.6 billion (+5,3% compared to 2020). As well, consumption of frozen products amounted overall to 941.561 tonnes, +5,1 respect 2020 and accounting to 16Kg per capita, vs. 15,2 Kg per capita in 2020

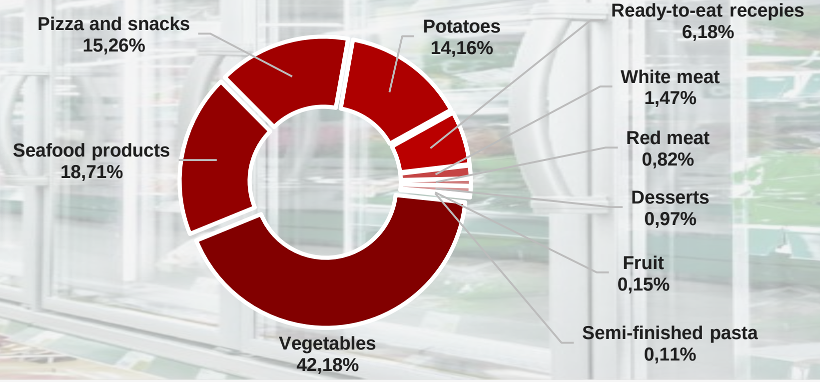
941.561 TONN.

CONSUMO DEI SURGELATI NEL 2021

16 KG

CONSUMO PRO-CAPITE ANNUO

Breakdown of consumption volumes by type of product



Sources: ITA, Invitalia, Cerved Group, Istituto Italiano Alimenti Surgelati - IIAS

PACKAGING

The Italian AgriFood industry is a significant driving force for the packaging industry, leading to the creation of innovative products and support systems. In Italy, specialized enterprises that meet the distinct requirements of the AgriFood sector make up nearly one-third (28%) of all packaging industry operations.

PACKAGING ACTIVITIES
2020 - NACE N 82.92

€1.84 B
Turnover

€1.46 B
Production Value

€665 M
Value Added

2.549
Local Units

22.310
Workforce

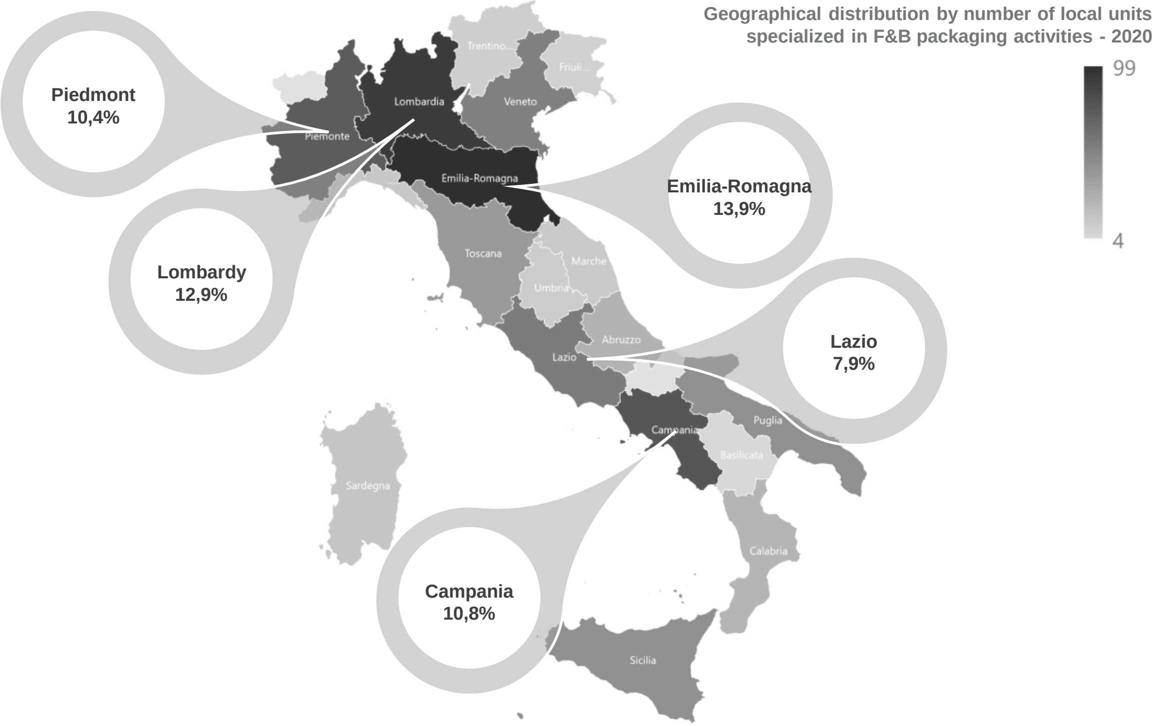
SPECIALIZED F&B PACKAGING ACTIVITIES
2020 - NACE N 82.92.1

712
Local Units

7.414
Workforce

Specialized AgriFood packaging enterprises are primarily concentrated in the northern regions of Italy. Nevertheless, there are also notable clusters of specialized enterprises operating in the southern regions of the country

Geographical distribution by number of local units specialized in F&B packaging activities - 2020



Sources: I.stat

Annex: Lead Generation Targets

WHAT ARE WE LOOKING FOR

FDI projects concerning the five ranges of fruits and vegetable production, process, and preserve are of major interest to Italian authorities and stakeholders.

PROJECTS	CLASSIFICATION OF FRUIT AND VEGETABLES		
Agricultural production and first processing	**» FIRST RANGE** Fresh or perishable products which have not undergone any preservation treatment.	**» FOURTH RANGE** Ready-to-eat fresh fruit and vegetable: washed, dried, cut, packaged in containers, plastic bags in a controlled atmosphere; or modified. *Priority*	
Food&Beverage processing & preserving	**» SECOND RANGE** Products that have undergone pasteurization and sterilization treatments. Stable products that do not require cold storage.	**» THIRD RANGE** Products which have undergone freezing and deep-freezing treatments. *Priority*	**» FIFTH RANGE** Products that, after been preliminary processed (selected, washed, sliced, peeled), are pre-cooked, sterilized and vacuum-packed, or steamed, grilled or boiled and packaged in a protective atmosphere (perishable products). *Priority*





WHO ARE WE LOOKING FOR

OPERATORS LOOKING FORWARD TO BEING PLACED AT THE HIGHEST LEVEL OF THE GLOBAL FOOD&BEVERAGE VALUE CHAIN

Large scale production operators

Operators specialized in large scale agricultural production looking for:

- *Reinforcement and/or enrichment of produce portfolio and new ingredients (particularly PDO and IGP products)*
- *Production of Made in Italy vegetables and horticultural produce and cereals (including seeds) for Private label*
- *Specialized production of active ingredients aimed at Nutraceutics/Cosmetic industries*
- *Large scale production of Industrial crops*

Food&Beverage Processing operators

Specialized Food&Beverage processing operators looking for greenfield opportunities aimed at:

- *First processing and commercialization of fresh agricultural products (IV range)*
- *Processing and preserving of fruit and vegetables (including the manufacture of fruit and vegetable juice/jams and other snacks)*
- *Processing and preserving of meat and production of meat products*
- *Manufacture of dairy products (including cheese and/or Ice cream)*
- *Manufacture of homogenized food preparations and dietetic food*
- *Manufacture of grain mill products, starch products, bakery and farinaceous products, confectionery*
- *Manufacture of beverages*

Logistics Operators

Logistics operators specialized in Food&Beverage able to:

- *Offer reliable logistics solutions aimed at reducing gaps in the value chain.*
- *Correctly carry out F&B producs transportation and storage with particular attention to the correct maintenance of the cold chain throughout the entire value chain.*

Importers and trade operators

Specialized Food&Beverage trade operators looking for opportunities aimed at:

- *Import/Export or Retail of Made in Italy fruit and vegetables*
- *Import/Export or Retail of Made in Italy meat and meat products (including cold cuts)*
- *Import/Export or Retail of Made in Italy dairy products, particularly cheese.*
- *Import/Export or Retail of other Made in Italy F&B products*

Sustainable Energy operators

Energy operators, able to maximize energy recovery, generation and storage.

In particular, through the creation of Agri-PV park, upgrading existing productive sites, i.e. installing PV panels over the roofs of buildings for productive use in the agricultural, livestock and agro-industrial sectors.