

AIDEPI – EUROMONITOR CO-BRANDED SEMINAR

Consumer Trends and Future Prospects Worldwide *Pasta, Bakery, Breakfast Cereals, Confectionery and Ice Creams*

22 November 2012, Milan

The State of the Pasta Industry: Global Trends and Prospects

Mara Magro, Research Analyst, Euromonitor International

Pasta sales remained resilient in 2011 and are expected to advance again in 2012. In this presentation, Mara Magro, Research Analyst at Euromonitor International, will identify several drivers of market growth, and analyse potential prospects, threats, and growth opportunities in this dynamic industry. The presentation will feature the latest data and insights on the pasta market from Euromonitor International's Passport global database which will highlight market opportunities and strategic direction for all industry players.

Global Bakery Outlook: Heating up or Cooling off?

Mara Magro, Research Analyst, Euromonitor International

Bakery is an attractive prospect, with emerging economies demanding value and volume sales, while developed ones seek to add value in shrinking markets. Increasing obesity promotes healthier product reformulations. Continued movement towards modern retail channels are changing the bakery landscape, with increased private label penetration in supermarkets. In emerging markets, traditional sales channels are proving adaptable. Mara Magro, Research Analyst at Euromonitor International, will investigate bakery market development, aiming to ensure sustained growth prospects in the aftermath of the global meltdown.

Impulse Purchases Drive Growth in Ice Cream

Ildiko Szalai, Senior Packaged Food Company Analyst, Euromonitor International

Euromonitor International latest research shows that despite renewed economic uncertainty worldwide, ice cream retail value and volumes continue to grow. However, take-home products are far more sluggish given their over-reliance on already mature markets like Western Europe, which remain at the centre of the new global slump. Meanwhile, impulse formats continue to grow steadily as a result of their strong position in emerging markets. Ildiko Szalai, Senior Packaged Food Company Analyst at Euromonitor International, will highlight current trends and future prospects for the global ice cream industry, as well as market opportunities worldwide.

Positive Outlook for Confectionery, Despite Broader Economic Woes

Ildiko Szalai, Senior Packaged Food Company Analyst, Euromonitor International

Global confectionery retail value sales are expected to remain dynamic despite economic concerns, largely driven by emerging markets shifting from volume to value-led consumption, as well as the 'affordable luxury' trends in recession stricken developed markets. Chocolate products are forecast to outperform sugar confectionery globally, indicating the trend of changing preferences and growing spending power in emerging markets. Ildiko Szalai, Senior Packaged Food Company Analyst at Euromonitor International, will provide an overview of the chocolate and sugar confectionery, highlighting growth opportunities and threads worldwide.

MARA MAGRO



In her current position as Research Analyst at Euromonitor International, Mara Magro has direct responsibility over the content and quality of Euromonitor's consumer goods industries researched in Southern Europe. Her role also entails managing a team of country analysts and conducting local research studies across various industries, including foods, beverages and consumer foodservice

Thanks to her studies in Statistics and Economic Science at the University of Padova, as well as her 10 year experience in the research field, Mara comes with extensive knowledge of consumer behaviour and market trends.

ILDIKO SZALAI



Ildiko Szalai is a senior company analyst for packaged food research at Euromonitor International, which she joined in July 2006.

In her current position she published a significant number of studies related to corporate strategies, market entries, competitive intelligence and opportunity analysis in the packaged food industry. Her industry expertise includes multinational food and beverage companies' strategies, objectives and challenges.

Before she joined the company analysis team and specialized in the global food market in 2008 she was involved in syndicated company research on a variety of FMCG industries.

ABOUT EUROMONITOR INTERNATIONAL



Euromonitor International is the leading provider of global strategic intelligence on consumer markets, with offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Santiago de Chile and Cape Town and in-country analysts worldwide. For more than 30 years, Euromonitor has published internationally respected market research reports, business reference books and online information systems, providing strategic business intelligence for the world's leading FMCG multinationals.

ABOUT AIDEPI



AIDEPI, the first cereal and sweets associative benchmark in terms of consistency of associates, represents the national manufacturing industries of Pasta, Breakfast cereal, Chocolate and cocoa-based products, Ice creams, Sugar confectionery Biscuits and other fine bakery products.

The association safeguards its members' interests by talking with institutions and administrations, either about the sector's regulations' development or as a propeller of activities aimed to the protection and promotion of the represented products.

For further information, please contact Violetta Scola, Communications Executive at Euromonitor International, on Violetta.scola@euromonitor.com