



**Tempting
and Delicious
by Tradition**

AGRIFOOD





POPULATION 4.4 m (7.3% OF THE NATIONAL TOTAL)	PEOPLE LIVING IN TORINO AREA 2.3 m (52% OF REGIONAL TOTAL)	OVER 1k towns AND 8 MAIN CITIES
EXPORT €47.9 bn (11.1% OF THE NATIONAL TOTAL)	GDP €127 bn (7.8% OF THE NATIONAL TOTAL)	COMPANIES 436,043 (7,2% OF THE NATIONAL TOTAL)
OVER 1.8 m PEOPLE EMPLOYED (8% OF THE NATIONAL TOTAL)	ABOUT €1 bn TO BOOST REGIONAL COMPETITIVENESS	PIEMONTE RANKS 4th in Italy FOR EXPORT QUOTA

European and global gateway

Piemonte is strategically positioned at the heart of the European development system, right at the crossroads of the main routes between the North-South, East-West. As part of the European Union, companies located in Piemonte have duty free access to more than 30 national markets within the European Economic Area and to the world's richest consumer market of 500 million people, over 330 million of whom work in the single currency.

Italy is Europe's 2nd largest manufacturer and in the last 30 years has always ranked in the World's Top 10 Manufacturers. Piemonte has strongly contributed to this success, demonstrating to be one of the manufacturing engines of Europe. It produces about 8% of Italy's national wealth, and its production system has reached high levels of excellence and tertiary sector expansion. Piemonte is a promising and competitive business area. The region is as dynamic in industry as in services, with a skilled, flexible and versatile workforce.

THE R&D SYSTEM

Recent data confirms that Piemonte is a leading Italian region in R&D. Companies expenditure in R&D: 1.42% of GDP (national average of 0.65%), with a number of workers in R&D of 6.2 per 1.000 inhabitants (national average of 4.0) and an increasing IP impact, with a number of 137.6 patents registered per million inhabitants (national average of 83.6) (Source: Istat 2017).

200
private and public
R&D centres, 7
Innovation Hubs,
4 Science &
Technology Parks

1st
Italian region in terms
of private investment
in R&D

3rd
Italian region for
hi-tech patents

7
Innovation Hubs

Polo AGRIFOOD — Agrifood - www.poloagrifood.it
BioPmed — Life Sciences and Health - www.biopmed.eu
CGreen — Green Chemistry and New Materials - www.cgreen.it
CLEVER — Energy and Clean Technologies - www.poloclever.it
MESAP — Smart Products and Manufacturing - www.mesap.it
Pointex — Textile - www.pointex.eu
Polo ICT — Information Communication Technologies
www.poloinnovazioneict.org

Piemonte fine wine and food tradition, appreciated all over the world, is one of the symbols of Italian excellence. Piemonte is featured by a unique offer made of many typical and wholesome products, rich in quality and variety, based on artisan or semi-artisan techniques, including a wide spectrum of specialties: wines and spirits, sweets and chocolates, cheeses, cured meats, rice, pasta, fruit and the prestigious white truffle, characterized by a bouquet of particularly intense perfumes.

Facts and figures about agrifood sector in Piemonte

17 DOCG wines
(Controlled and Guaranteed Designation of Origin)

42 DOC wines
(Controlled Designation of Origin)

14 PDO products
(Protected Designation of Origin)

9 IGP products
(Protected Geographical Indication) among which the Piemonte hazelnut

328 PAT products
(Traditional Agricultural Food Products)

58,500 companies among:
 > 4,600 food & beverage
 > 500 agricultural machineries & equipment for food & beverage industry
 > 53,400 operate in agriculture and forestry

100,000 employees

5.5 bn € export

4.6 bn € import

Among Piemonte's leading key players

- Balocco
- Biraghi
- Eataly
- Ferrero
- Igor
- Lavazza
- Martini & Rossi
- Nutkao
- Raspini
- Saclà





Rice

Italy is the largest European producer of rice (1.6 million tons per year) and Piemonte the largest growing region of the continent with 52% of the total Italian production. In Piemonte the production focuses on certain prized and traditional varieties, namely *Carnaroli*, *S. Andrea*, *Arborio*, *Baldo*, *Balilla*, *Vialone Nano* and *Roma* and, more recently, the black *Venere* rice. Since 2007, Piemonte can boast the only Italian PDO rice: *Riso di Baraggia Biellese e Vercellese* grown in some of the Biella and Vercelli municipalities.



Chocolate

In Torino and Piemonte, it is impossible to talk about chocolate without talking about hazelnuts. The successful blending of the two ingredients occurred by chance due to the need to replace cocoa - which had become too expensive following the blockade ordered by Napoleon in 1806 on products from Great Britain and its colonies - with hazelnuts as these were widely available locally. The successful "blend" confirmed in *gianduja* the perfect affinity between these two raw materials, marking the development of the future chocolate production in Piemonte. The first historic producer was Caffarel, or rather Mr. Michel Prochet who later joined the Caffarel company. He invented the *giandujotto*, the first wrapped chocolate in 1865, again at a time when high taxes made imports of large quantities of cocoa unaffordable. Today, in Piemonte there are more than 110 production companies (14.6% of the Italian total), from the smallest artisans to large industries, most of them characterized by a strong focus on quality. In many parts of Italy and the world, Piemonte is identified as "the land of chocolate", with Torino as its capital.

Pasta

Piemonte boasts a tasty tradition in pasta-making, here like in most of Northern Italy, mainly identified with fresh pasta (like *tjarin*) and filled pasta (*agnolotti*, *ravioli*) mainly produced by small family owned companies. These companies exist along with large production units of "dry pasta", some of which belong to multinational groups.



Craft beer

Craft breweries and brewpubs have increased by 400% over the last ten years, meaning a production growth rate of 53% a year. In twenty years, the development rate was therefore huge and exciting, considering that the wine culture in Italy is as deep-rooted as grape vines and that beer still suffers from the image of being the poor man's alternative to wine, to be drunk in a pizzeria, but not in an elegant restaurant.

In Piemonte there are presently 115 such establishments, comprising craft breweries, brewpubs and "beer firms" or farmer brewer.

The widely recognized Italian creativity has developed very distinctive products such as the grape ales, fermented with wine must, which in Piemonte can be made from Moscato d'Asti wines or also from other white or red grapes. Here you can also find beers made with special cereals (rye, kamut, rice, spelt or wheat) or fortified with fruits such as cherries, strawberries, black currants, the *Madernassa* pear, wild berries, apples, or local herbs such as *Genepy*, which is typical of the Alpine area, as well as beers that are aged in wine barrels.



The white truffle

Every autumn, in the middle of the night, the white-truffle hunters of southern Piemonte take their dogs to seek and find the highly prized *Tuber Magnatum Pico* or White Truffle, one of the most expensive foods in the world, whose cost varies between € 2,500 and € 6,000 per kilogram, according to how bountiful the season is.

The white truffle is an *Ascomycete Fungus* that grows underground symbiotically among the roots of oak, hazel, poplar and beech trees and ripens during the autumn. It can reach a width of 12cm and a weight of 500g or more, though it is usually much smaller. The flesh is pale cream or brown with white marbling and its unique flavour and aroma make it extremely sought-after by starred chefs and food lovers. The heady aroma and taste are described as a mixture of earth, tree roots, old cheese, honey, hay, garlic and ammonia.



Cheese

Piemonte has a centuries-old tradition in dairy-farming thanks to its wide pastures on the Alps and on its hilly areas: some of the cheese products of the region date back to the Middle Ages. The dairy sector in Piemonte offers a host of high quality products. Today, a total of 51 cheese varieties are produced in the region by several small enterprises and some large, very aggressive and marketing-oriented companies. The region boasts 10 PDO cheeses, among which the world famous *Grana Padano*, *Castelmagno*, and *Gorgonzola*: indeed 70% of the Italian production of this exquisite blue cheese comes from Piemonte.



Fruit and hazelnut

With some 100,000 hectares of land under fruit and vegetable cultivation, Piemonte is a very important player among the fruit and vegetables production regions of Italy. The main cultivated fruits are: apples, peaches and nectarines, kiwis, apricots, plums, pears, cherries, strawberries, berries, chestnuts and hazelnuts, along with many vegetables, including typical varieties, such as peppers, tomatoes, aubergines, zucchini, beans, cardoons (globe artichokes), melons, cauliflowers and cabbages, as well as potatoes. The hazelnut variety grown in Piemonte (*Tonda Gentile Trilobata*) is particularly appreciated and sought-after by the local confectionery industry due to its extraordinary organoleptic properties: high percentage of oil, excellent aroma and taste after roasting, excellent peelability and long shelf life.

Liqueurs and spirits

Piemonte is the land of liqueur and spirits of great quality and worthy of the excellent indigenous grapes they come from and from the aromatic and officinal herbs, cultivated or spontaneous in the numerous alpine valleys.

One of the leading spirits is certainly Grappa, a distillate obtained from marc, the grape skins when they are separated from either must or wine. Grappa is exclusively an Italian product by tradition, culture, and law and is protected by the EU geographical indication. Two Grappas are exclusive to Piemonte: *Grappa di Barolo* and *Grappa del Piemonte*.

Not to forget is *Genepy*, the Gentian liqueur whose flavour and aromas evoke domestic and homemade atmospheres.

Vermouth di Torino

Vermouth is an aromatized fortified wine made famous all over the world by the Piemonte company Martini & Rossi. Its roots can be found in ancient civilizations, which commonly infused botanicals in their wines. In 1786 the young Antonio Benedetto Carpano created a superior elixir in his Torino workshop, based on Moscato wine, to suit the taste of women. In the years to come, many other companies followed his example and the production of vermouth flourished with the creation of very important companies, such as Gancia, Bosca, Cinzano, Martini & Rossi and Cora and it was drunk by aristocrats and sold at local cafés, soon confirming its role as Italy's classic aperitivo.

Today it has been recognized an EU geographical indication as *Vermouth di Torino* and it is produced by some 30 producers, both artisanal and industrial. It is enjoying an interesting revival thanks to the mixology culture, which is adding new charm and interpretations of this aromatized wine alongside with the old classical vermouth-based cocktails such as Manhattan, Martini and Negroni.

Wine

Piemonte is the region that produces some of the best known and finest Italian wines which are globally appreciated and need no introduction: *Barolo*, *Barbaresco*, *Moscato d'Asti* and *Asti Spumante* are but a few wines that sell millions of bottles every year all round the world. Around 85% of the wines produced in Piemonte are PDO: 17 are DOCG and 42 are DOC wines. Piemonte wines are mostly produced with 20 native Italian grape varieties, amongst which *Nebbiolo* - boasting alone 4 DOCG wines: *Barolo*, *Barbaresco*, *Ghemme* and *Gattinara* - *Barbera*, *Dolcetto* and *Moscato*.

A snapshot of the wine industry in Piemonte shows 44,200 hectares of land under vine, with a total production of grapes around 300,000 tons per year. All grapes are processed into wine - there are no table grapes in Piemonte - resulting in a little more than 2-2.3 million hectolitres of wine.





Cattle breed and cured meat

Piemonte is the second most important Italian cattle breeding region, with 14% of the national total of beef cattle. Piemonte stands out for being the largest breeder of native breeds at national level, with 300,000 head of a particularly prized autochthonous breed, the *Piemontese* breed, better known as *Fassone*, which has recently acquired the Protected Geographical Indication (PGI), as *Vitelloni Piemontesi della Coscia* and has become a Slow Food presidium. In Piemonte, 6,000 companies and 15,000 people are involved in actively breeding the *Piemontese* cattle, generating a turnover of 500 million euros. Piemonte also counts breeding of pigs, sheep, goats and poultry most of which are autochthonous. Thanks to the traditional system of animal breeding and feeding of the small and medium livestock farms, there is a rich and variegated development of fresh meat and meat products, such as: raw and cooked ham, salami, sausages.

Machinery and equipment

The production of agricultural, forestry and gardening machinery in Piemonte is very lively and diversified and includes companies covering a wide range of sectors: from traditional machines for cultivating, fertilizing and sowing the land, to those for collecting fruit, straw and fodder productions, forestry machines such as chippers, machines for gardening, paddy fields and vineyards. Italy is the second world player in the production of agricultural machinery and tractors in terms of volume, immediately behind the U.S.A. In Piemonte, the industry accounts for some 200 companies, achieving a turnover of 350 million euros and employing about 2,500 workers. These figures do not consider the New Holland industrial giant, forming part of the CNH Group.

Piemonte also boasts a top class tradition in equipment and technologies for food and beverage industry: from dairy industry to frozen products, from cereals to preserves and confectionary industry, from packaging to bottling and labelling. Over 70% of winemaking machinery and technologies present in the cellars around the world are made in Italy. Piemonte has a significant role in this industry: important companies such as Guala Closure, making plastic and metal closures for wines, spirits, oil and other drinks or Arol which manufactures closing and capping systems, Gai with bottling plants, are just some of the industries operating in the sector. Innovation, security, performance, versatility and network: these are some of the keywords passed down by entrepreneurs from generation to generation, making their enterprises competitive and contributing to be "Made in Italy" ambassadors in their fields.

Find the **right partner** for your business

Made in Italy: Agrifood is a special project promoted by Regione Piemonte, financed by ERDF – European Regional Development Fund and managed by Piemonte Agency offering international players the shortest way to meet and start business with agrifood top class companies based in Piemonte-Italy.

Companies of this project represent the best of Made in Italy in the following fields:

- beer, spirits and liquors, mineral waters and beverages
- bread, breadsticks, bakery products
- coffee, tea, infusions
- confectionary, chocolate and pastry
- dairy products and cheese
- fresh and preserved fruit & vegetables
- ice creams and other frozen products
- meat and cured meat
- oil, vinegar, other dressings and spices
- pasta, rice, cereals and flour
- starters, jams, sauces, gastronomic specialties
- agricultural machineries
- machineries for the food and beverage industry
- machineries for the wine industry
- other equipment, services and technologies for the food and beverage industry
- vending machines
- laboratory testing
- agricultural advisory service
- food hygiene test, food processing control system.





The Team ascertains international players' needs and upon request suggests possible suppliers and arranges matchmaking activities:

organization of b2b meetings in Piemonte or on one's premises

visits to local companies to discover the region's agrifood sector

participation in international events

trade missions to connect demands and supplies

The project Team's assistance is supply chain focused and completely free of charge.

For more information on the **AGRIFOOD sector in Piemonte** and its business opportunities the Project's Team:

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Piemonte Agency

To come to know about the local economic system, to get information on business opportunities in the area and to find a quality destination for direct investment, the Regione Piemonte offers an entry point: Piemonte Agency, the one-stop-shop to get in touch with Piemonte.

The Agency provides a complete range of free services to foreign companies:

- wishing to locate in Piemonte
- searching for suppliers and partners in a variety of sectors
- needing technical training on foreign trade

The Agency is a reliable partner that guarantees:

- responsive and tailored assistance at all stages of the investment project
- matchmaking of the regional production offer with the needs expressed by international markets
- targeted activities to connect highly qualified local companies with foreign partners
- training in the field of internationalization
- international cooperation projects

Piemonte Agency

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PIEMONTE^{ITALY}

THE PLACE TO TASTE