



Food Digital Export

The forefront of the digital business

Short sum up

1. Global Digital Headline
2. Selling online Food → main trends
3. General critical points
4. Food Digital Strategy → Italian case study
5. Opportunities in the Digital Export

A dark blue background featuring a grid of small white dots forming a world map. Overlaid on the map are various white line-art icons representing digital and business concepts: a hand holding a coin, a person at a computer, a cloud with a download arrow, a laptop with a dollar sign, a magnifying glass over a dollar sign, an hourglass, a document, a magnifying glass over a document, a pie chart, a target, and a person. A white horizontal line is positioned below the text.

Global Digital Overview

JAN
2021

GLOBAL DIGITAL HEADLINES

ESSENTIAL HEADLINES FOR MOBILE, INTERNET, AND SOCIAL MEDIA USE AROUND THE WORLD

INTERNET USER NUMBERS NO LONGER INCLUDE DATA SOURCED FROM SOCIAL MEDIA PLATFORMS, SO VALUES ARE **NOT COMPARABLE** WITH PREVIOUS REPORTS



Clip slide

TOTAL
POPULATION



7.83
BILLION

URBANISATION:

56.4%

UNIQUE MOBILE
PHONE USERS



5.22
BILLION

vs. POPULATION:

66.6%

INTERNET
USERS*



4.66
BILLION

vs. POPULATION:

59.5%

ACTIVE SOCIAL
MEDIA USERS*



4.20
BILLION

vs. POPULATION:

53.6%



we
are
social



KEPIOS

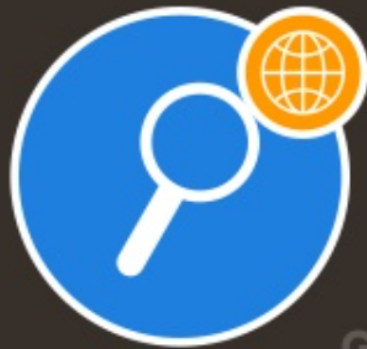
JAN
2021

GLOBAL ECOMMERCE ACTIVITY OVERVIEW

PERCENTAGE OF GLOBAL INTERNET USERS AGED 16 TO 64 THAT REPORTS PERFORMING EACH ACTIVITY IN THE PAST MONTH



SEARCHED ONLINE FOR
A PRODUCT OR SERVICE
TO BUY (ANY DEVICE)



GW.I.

81.5%

VISITED AN ONLINE
RETAIL SITE OR STORE
(ANY DEVICE)



90.4%

USED A SHOPPING
APP ON A MOBILE
PHONE OR ON A TABLET



GW.I.

69.4%

PURCHASED A
PRODUCT ONLINE
(ANY DEVICE)



we
are
social

76.8%

PURCHASED A
PRODUCT ONLINE
VIA A MOBILE PHONE



55.4%

JAN
2020

ESTONIA

THE ESSENTIAL HEADLINE DATA YOU NEED TO UNDERSTAND THE STATE OF MOBILE, INTERNET, AND SOCIAL MEDIA USE



ESTONIA

TOTAL
POPULATION



1.33
MILLION

URBANISATION:

69%

MOBILE PHONE
CONNECTIONS



1.81
MILLION

vs. POPULATION:

136%

INTERNET
USERS



1.19
MILLION

PENETRATION:

90%

ACTIVE SOCIAL
MEDIA USERS



760.0
THOUSAND

PENETRATION:

57%



we
are
social



KEPIOS

How is the
food segment
doing online?





Selling online Food

Main trends

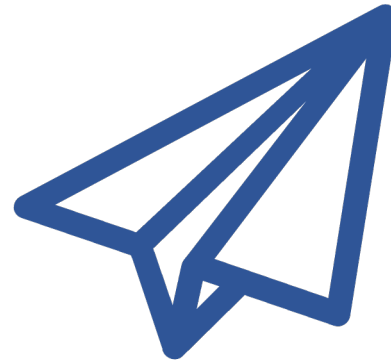
Scenery and perspectives to consider

- The B2B sector is running a slow and silent digital revolution
- The business models of this e-commerce are different and multi-channels
- There is supply and demand of the B2B online market: consider what buyers are looking for, and what sellers expect
- Marketplace: how to orient yourself and how to choose them

Digital Sales → irreversible process



- The impact of Covid on online Food & Beverages has made the sector **jump forward by at least 5 years**
- Online sales in food are always on the rise: **+ 19% in 2020** compared to 2019 **+ 6.6% in 2024** compared to 2020
- 76,8% of internet user (5,22 b.) purchased an order online (any device)



Categories trends 2020



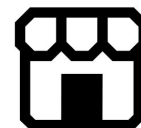
FOOD



INSURANCE



FURNITURE



MARKETPLACE



PUBLISHING



ELECTRONIC



FASHION



BEAUTY & HEALTH



FREE TIME



TRAVEL

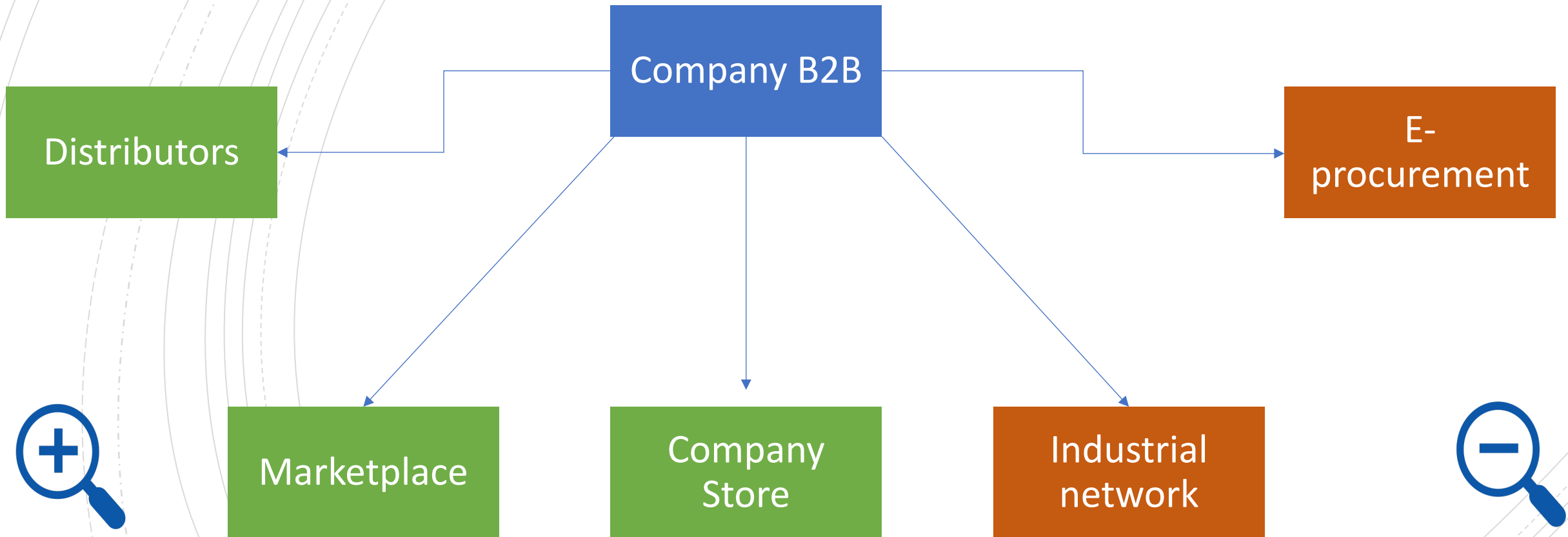
Food
worldwide
figures →
online sales
2020

USA market → US \$ 50.601 m >>
It accounts for 8% of the online
sales in the United States

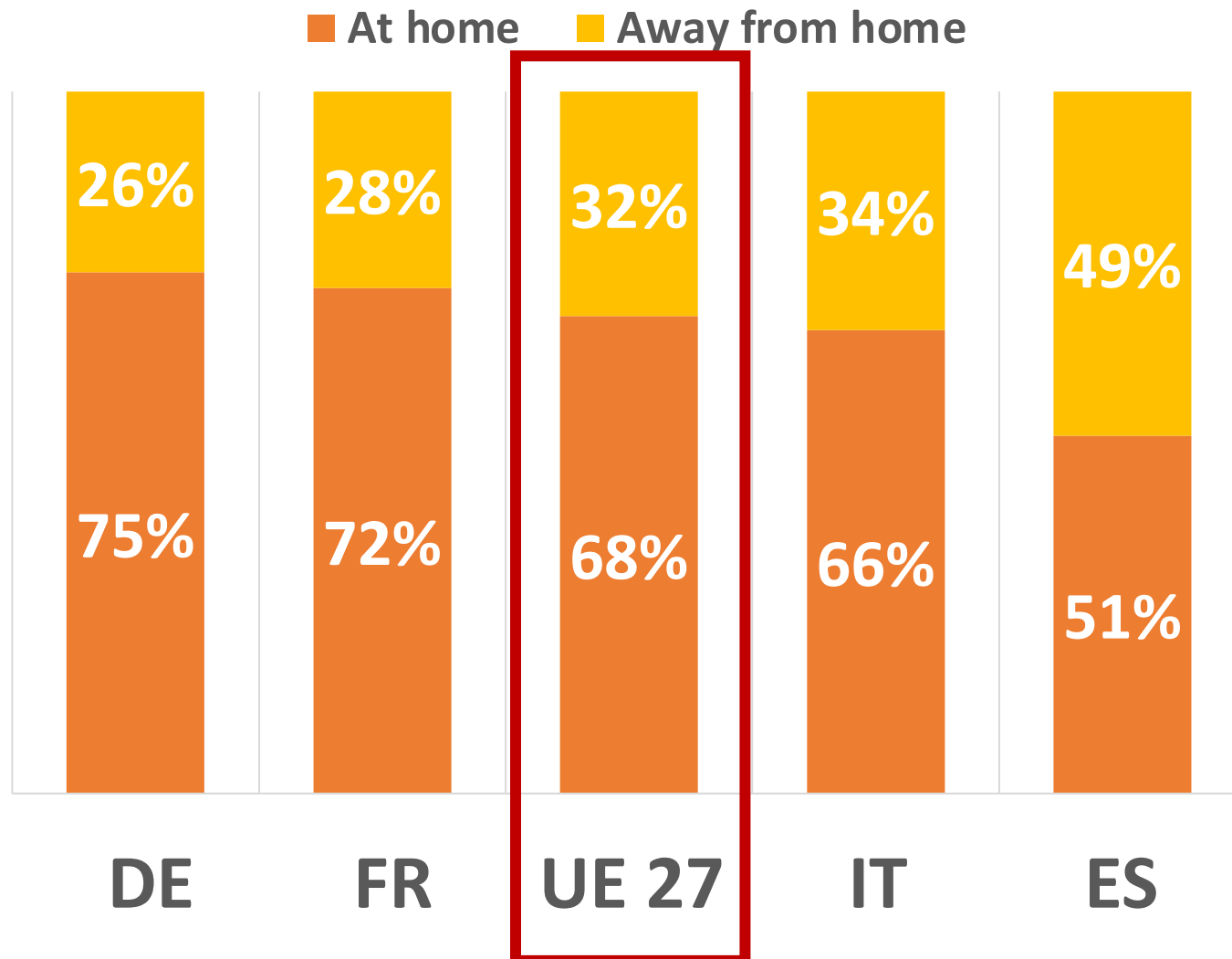
DE market → US \$ 11.102 m >>
It accounts for 12% of the online
sales in Germany

UK market → US \$ 15.870 m >>
It accounts for 17% of the online
sales in the United Kingdom

Different Business Models



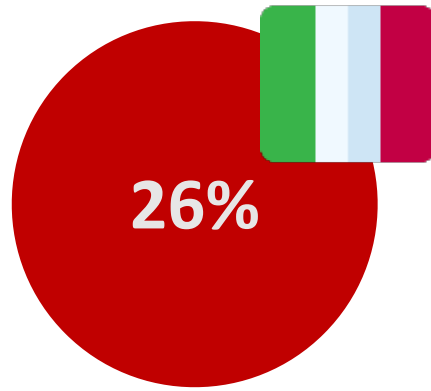
Consumption trends



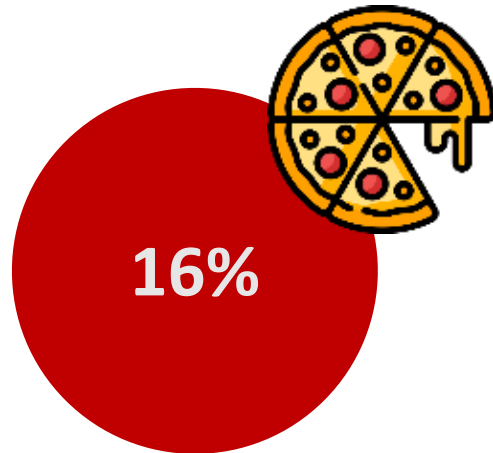
DURING LOCKDOWN IN ITALY:

- ✓ 22% of endconsumers bought more Made in Italy products
- ✓ 20% of endconsumers bought **sustainable** products
- ✓ 49% of endconsumer bought **healthy** products

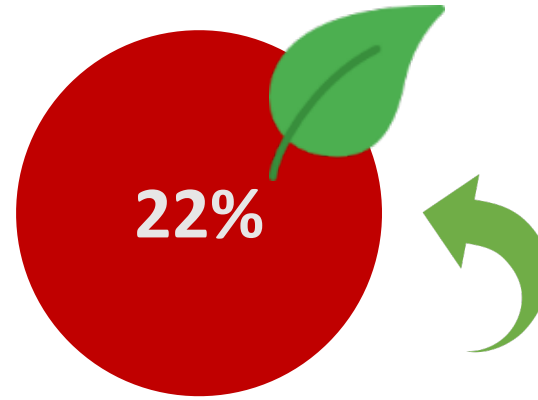
Consumption drivers (in Italy)



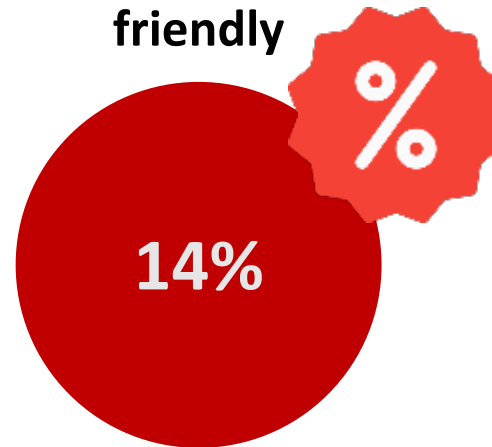
100% Italian



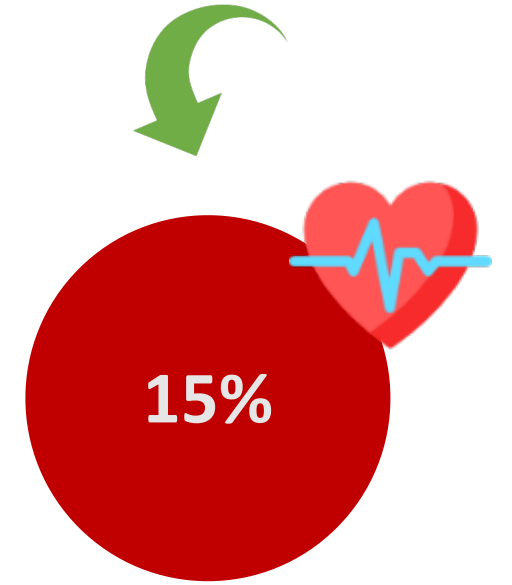
Products of the tradition



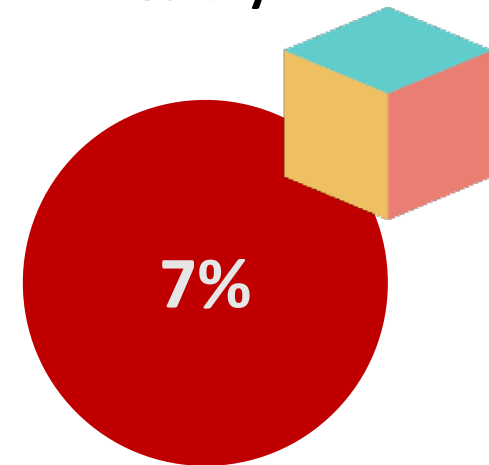
Environmental friendly



Convenience



Healthy



Mix of factors



General critical points

Main problems of the early birds

Main critical issues



Incidence of transport costs



Logistic solutions >> 3 temperatures > inappropriate supply chain > high costs



Organicity of the offer



Lack of competences



Risks of channel conflicts



the integration of e-commerce platform with existing ERP



Digital penetration & people attitude to buy online



Food Digital Strategy

The Italian case study

Overview on
the Italian
food industry
→ ONLINE
SALES

- The value of the Food sector on the total e-commerce is growing: + 19% compared to 2019
- There are 4 recurring e-commerce models in the Food sector
- There are 5 defined strategies to optimize your e-commerce model
- The traceability of the supply chain can create real added value for the customer and / or the producer / distributor

4 Digital Strategies

The stand alone product

- >> Nespresso >> Noberasco >> Kusmi Tea
- individual products are sold on proprietary sites and respond to well-defined mental categories and satisfy specific needs

The owned basket

- >> Ferrarini >> Alce Nero >> Sant'Anna
- a manufacturer develops an e-commerce where he sells all his products/category supplying an organic offer to end consumer

The basket in partnership

- >> OliveYou >> Campagna amica >> Granarolo
- different manufacturers forge a partnership and pool their products by optimizing the online distribution network/platform

The grocery mix

- >> Amazon >> Cortilia >> Eataly
- the sale of the product takes place in marketplaces or other specialized platforms

5 strategies for the e-commerce model

Mental categories: respond to specific needs

Facilitated purchases: transforming the purchase into repeatable and routine

Brand value: creating value with targeted actions

Impulse purchases: incentivize unplanned purchases

Product differentiation: dedicating products, formats and packaging to online sales

Topic points for italian food success in export



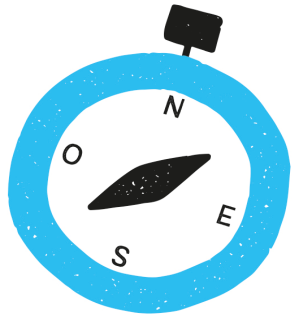
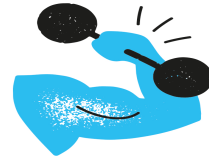
Opportunities in the Digital Export

Marketplaces can be a chance?





Marketplace



The chance of Marketplaces

- They already exist
- Commissions on sales
- Integrated marketing system
- Internationalization
- Logistic Service
- Online sales “gym”

Conclusions

To invest in digital infrastructure

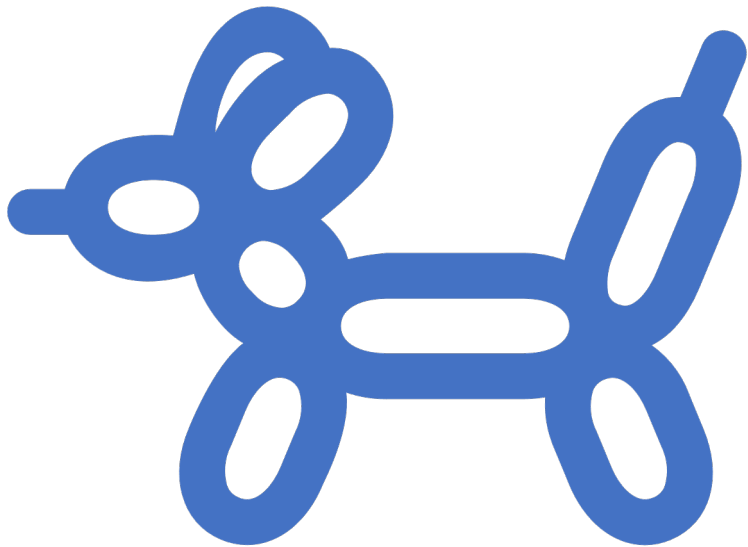


To invest in skilled human resources →
in digital education



Do not wait a
minute more!





THANKS!

Enjoy your upgrade!

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