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Management Report **Dolce Vita**



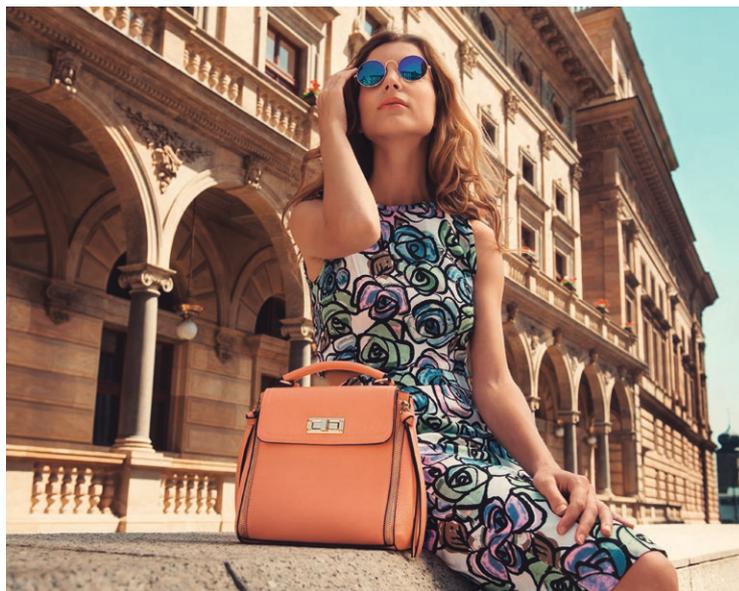
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Management Report

Dolce Vita

Italian lifestyle as a success factor at the point of sale



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Preface

Italy – there are few countries as well known across the world for their love of life, culinary delights and outstanding sense of design.

But for Germans, in particular, there is a lot more to it than that. Italy is one of our most important trading partners. The first traders from Italy came to Germany over the Alps, to offer their wares here at the Frankfurt fairs, as far back as the Middle Ages. And nothing has changed since: Italian exhibitors and visitors continue to occupy high-ranked positions amongst the top ten countries of origin.

I am, therefore, delighted that Italy is now also the partner country for Ambiente 2016. And, in an extensive presentation at the exhibition centre, we shall be showcasing what Italian products and Italian design are all about and what new products are now available from 'la bella Italia'.

In the present Management Report, on the other hand, we deal with the importance of German-Italian trade relations and show the way in which imports from Italy have developed between 2010 and 2015, based on key market data. Alongside this, the report provides information on which goods from this, our neighbouring country, do particularly well on the German market. In so doing, there is a special focus on nine different product groups, which are typical for Ambiente. These include: glass, porcelain and ceramics / household goods; small electrical appliances; small furniture items; picture frames and domestic lamps; jewellery and watches; leather goods and accessories as well as garden equipment.

A survey of specialist retailers, administered to a total of 210 respondents, completes the study. As well as retailers specialising in glass, porcelain and ceramics, electrical and leather goods, senior staff in furniture stores, garden centres and



department stores have all provided information on the value of Italian and / or Mediterranean products in their product selections. They included information on the turnover they generate with products from the Mediterranean, for

which specialist retailers use 'Made in Italy' as a selling point, together with an assessment of the extent to which the Italian lifestyle plays a part for the consumer.

The study was commissioned by Messe Frankfurt and conducted by market-research experts at the Institute for Trade Research – IFH Retail Consultants – in Cologne. The results make clear the level of attraction that Italian goods have for the German population. In addition, we have risked a glance into the future. There is reason, we think, for you to be excited and encouraged by the findings.

I wish you an interesting and enlightening read.

Arrivederci a Francoforte!

A stylized, handwritten signature in black ink, consisting of a large 'S' and 'K' followed by a horizontal line and a small flourish.

Stephan Kurzawski

Member of the Extended Board of Management
Messe Frankfurt Exhibition GmbH

Executive Summary

Italian products play a major role in Germany

Imports of Italian goods to Germany continue to grow. Whilst, in 2010, there were already some € 42 billion worth of imports from Italy, by 2014, the figure had reached € 48.5 billion. And for 2015, The Institute for Trade Research – IFH Retail Consultants (Institut für Handelsforschung – IFH) predicts further growth to around € 49 billion. This means that Italy is – and is set to continue to be – one of Germany's most important trading partners. Italy has, for some years now, occupied 5th place among countries from which Germany imports goods.

'Dolce vita' a major export success

As a supplier of women's handbags, ornamental objects, gift items and garden equipment, as well as coffee and espresso machines, Italy has a firm foothold in the lives of German consumers. In the individual markets investigated, which included glass, porcelain and ceramics/household goods, small electrical appliances, small furniture items; picture frames and domestic lamps, jewellery, watches, leather goods and accessories as well as garden equipment, Italian imports accounted for a total of € 1.18 billion in 2010. In 2015, according to the forecasts of IFH Retail Consultants, the figure has already reached € 1.48 billion. Italian consumer goods, as they are presented at Ambiente, accordingly contribute significantly to market supply in Germany. The Italian lifestyle – la dolce vita – also plays a part on the international scene and we can therefore assume, moreover, that other countries are also producing consumer goods with design features that echo Italian or Mediterranean elements and that these connotations are deliberately used to enhance sales potential.

More 'dolce vita' in the product selection means more customers

Every third retailer polled indicated that Italian or Mediterranean products have led to greater interest on the part of customers and/or an increase in customer numbers. Furniture retailers and department stores, in particular, perceive Italian products as real customer magnets. To achieve this, companies also make efforts themselves: some 60 percent of respondents drew customers' attention to Italian and/or Mediterranean products with promotions of various kinds.

Trade fairs are the no. 1 source of information

Specialist retailers prefer to get information about products from Italy and the Mediterranean at trade fairs most of all. For 73 percent of companies, trade fairs are the no. 1 source of inspiration and information. In second place, with 37 percent in each case, come discussions with suppliers or manufacturers and professional journals and sector publications.

The future for Italian products in Germany

66 percent of retailers polled expect that sales of products of Italian or Mediterranean origin will continue to hold up. 18 percent assume that turnover will show even more positive development in future than in the past. Taken all together, positive trends could be confirmed in respect of trade in Italian consumer goods overall and in the sectors of the retail market that were investigated individually, covering glass, porcelain and ceramics, electrical goods, leather goods and furniture retail as well as garden centres and department stores.

The study

'La bella Italia' is, and continues to be, the land of dreams for many Germans. At all events, the times when an 'Italian journey' had rarity value, when a cup of espresso was greeted with expressions of wonderment and olive oil still seemed exotic are long since past. The Italian art of enjoying life has lent Italy's products perennial popularity in Germany.

But which are the products that are actually being imported today, in order to satisfy the German longing for the relaxed, Mediterranean lifestyle? What proportion of turnover is produced by trade in goods from this country beyond the Alps? Not least of all: what value does the 'Made in Italy' stamp have for Germans? In order to examine these questions in greater detail, Messe Frankfurt commissioned a report from the Institute for Trade Research – IFH Retail Consultants – from Cologne.

The results of the study rely on two separate sources. On the one hand, they are based on an analysis of key data on the development of German-Italian trade, with special reference to the years 2010 to 2015 and, on the other, they rest on the results of a poll of specialist retailers. For the survey, 210 companies from six different retail sectors were interviewed, covering specialist retailers of glass, porcelain and ceramics, furniture, electrical and leather goods as well as garden centres and department stores. 70 percent of respondents had their own independent shop, with the other 30 percent in subsidiaries and chains.



Findings – key market data

These days, there is no need to go to Italy to be able to enjoy a glass of Chianti and a plate of penne, all rounded off by an espresso coffee, as you look out over olive trees and terracotta tiles. Indeed, it is, today, impossible to imagine Germany without the influences of Italian life and lifestyle and the accompanying product palette.

Seen from an historical perspective, in the days of Germany's great literary figure Johann Wolfgang von Goethe, Italy was simply the place to visit. Albeit that it was very much the prerogative of the well-heeled, art-loving aristocracy.



Goethe wrote of his Italian journey:

"I can say that it is only in Rome that I have really been aware of what it means to be human. I have never again reached such heights, such pleasure in sensation."

Bergemann, Fritz (Ed.), Eckermann: Conversations with Goethe in the latter years of his life, 9 October 1828, published by Insel Verlag.

It was only with the German Economic Miracle in the 1950s, and the signing of the bilateral recruitment agreement between Italy and Germany, that the real boom in things Italian took off in Germany. Hundreds of thousands of Italian workers came to the Federal Republic during the following decades. Little by little, Italian cooking began to impress itself on German households and hearts. But not only that; the appropriate accessories such as pasta plates, espresso cups and latte macchiato glasses also soon began to establish themselves in German kitchens.



Since the first pizzeria was opened in Würzburg in 1952, Italian restaurants now dominate the culinary landscape of our towns and cities, some sixty years on. According to the Yellow Pages, there are currently 709 Italian restaurants and bistros in Berlin alone.

www.gelbeseiten.de/berlin, Last updated: 4 Dec. 2015.

The development in the importance of Italy and Italian products for Germans over the last 60 years can be seen by taking a look at the figures for the German-Italian trade relationship: whilst in 1960, goods to the value of € 1.3 billion were imported from Italy into Germany; this figure had already reached € 48.5 billion by 2014. This represents huge growth – by something like a factor of 37 – and clearly shows the importance of both Italian-produced items and the Italian lifestyle for Germany and the Germans. And the IFH are forecasting a further hike in 2015 to some € 49 billion.



According to the Federal German Statistical Office, a total of 620 vehicles from Italian car manufacturer Ferrari were licensed for the first time in Germany in 2014.

Statistical report by the German Federal Motor Transport Authority (Kraftfahrt-Bundesamt), January–December 2014.

Amongst the top ten countries, from which Germany imports goods, Italy has occupied fifth position for many years now. Only from the USA, France, China and the Netherlands does Germany import more. Taken altogether, after a leap in sales of plus 14 percent in 2010 /2011,

Top ten trading partners for German imports, 2014 (in € billion)

		2014
	The Netherlands	€ 88.1 billion
	China	€ 79.3 billion
	France	€ 67.6 billion
	USA	€ 48.6 billion
	Italy	€ 48.5 billion
	Great Britain	€ 42.3 billion
	Belgium	€ 39.9 billion
	Poland	€ 39.8 billion
	Switzerland	€ 39.3 billion
	Russian Federation	€ 38.4 billion

German-Italian trade is characterised by constant gentle growth at an already elevated level. The uninterrupted popularity of products from the beautiful country that is Italy is clearly shown in these figures. Two thirds of imported goods come from the following categories: machinery and electro-technology, chemicals, metal goods and motor vehicles. Followed by food and drink, on which German consumers spent a total of € 3.2 billion in 2014.

'Dolce vita' a major export success

The present study concentrates on nine specific market segments which are represented at the international consumer-goods fair Ambiente. They include glass, porcelain and ceramics /household goods, small electrical appliances, small furniture items, picture frames, domestic lamps, jewellery, watches, garden equipment and leather goods /accessories.

In 2010, goods to a total value of € 1.18 billion were imported from Italy into Germany. By 2014 the value of imported goods in these sectors had risen by 21 percent to € 1.43 billion. In 2015, according to figures extrapolated by the IFH, this figure may well have already reached € 1.48 billion.

Italian consumer goods, therefore, contribute significantly to market supply in Germany. Moreover, we can assume that there are consumer goods produced in other countries, whose design also picks up on Italian or Mediterranean features. This might be, say, a terracotta vase with an olive-branch pattern or, equally, an espresso machine or pasta plate, which are produced in another European or non-European country. The Italian lifestyle can, therefore, according to our present assumption, not only be imported in the form of goods from Italy itself, but is also frequently and enthusiastically borrowed as a popular theme by other countries. Success always finds its imitators.

In detail – consumer goods imports from Italy

Leather handbags, ornamental objects for the garden and gift items – Italian goods play an important role in Germany, when it comes to the supply of consumer goods for domestic consumption, as offered at Ambiente. Leading the field are **leather goods and accessories** with import volumes amounting to € 448 million in 2015.

The major proportion of these – specifically € 225 million – are women's handbags, which, therefore, represent a significant segment of imports from Italy. All in all, Germany imported € 786 million worth of women's handbags from all over the world in 2015. Some 40 percent of these originated in Italy. After women's handbags – but at a considerable distance – come product groups such as accessories (key fobs and key holders, for example), purses, belts and umbrellas, with a total of € 79 million, as well as suitcases, briefcases and travel bags with € 72 million. Germans spent a remaining € 72 million on Italian fashion accessories, such as ties, scarves, hats and gloves.

At number two in the rankings of the market segments under investigation here is the product group **glass, porcelain and ceramics / household** items. Altogether, Germany imported Italian products with a total value of € 392 million, covering glassware, tableware, porcelain and pottery, cooking and baking equipment and household items, as well as ornamental objects and gift items. Ahead of all the others are ornaments and gift items, with import volumes of € 220 million. In other words, 22 percent of all ornamental and gift items imported into Germany came from Italy. In position numbers two and three in the rankings of significant imports, with some distance between each, come cooking, roasting and baking utensils, at € 63 million and sundry household items at € 46 million.

Espresso, latte macchiato, cappuccino – Italian coffee specialities have come to be part, not only of the restaurant and café landscape, but also of a cultured lifestyle in Germany. And, indeed, there are now few households who do not have the relevant equipment to conjure up one or other of these Italian hot drinks. No wonder, then, that amongst small **electric appliances** imported from Italy, coffee and espresso machines rank high in the lists. Germans indulge themselves in original Italian coffee machines to the tune of € 110 million. A not inconsiderable sum, which accounts for around 22 percent of the import figures in this segment. That is to say, more than a fifth of all imports of coffee and espresso machines come from Italy.

Italian imports							
(in € million)							
	2010	2011	2012	2013	2014	2015	
Total imports from Italy	1,184	1,273	1,313	1,361	1,434	1,476	
Glass, porcelain, ceramic / housewares	347	351	370	370	384	392	
Small electrical appliances	221	217	214	217	223	239	
Small pieces of furniture	136	140	116	114	116	106	
Picture frames	8	8	7	6	6	5	
Domestic luminaires	46	52	53	58	64	58	
Jewellery	104	104	105	93	91	89	
Watches	5	4	7	6	8	8	
Garden furnishings	106	120	115	115	128	131	
Leather goods / accessories	213	277	326	380	414	448	

At all events, in 2010, Germans were already spending € 139 million on coffee machines, and so that figure is even higher today. If, however, we look at all imports into Germany, it quickly becomes clear that business in coffee and espresso machines is booming. In all, it is expected that something approaching an additional € 150 million worth of goods will be imported in this segment as against just five years previously.

Here, too, there is a predominant general assumption that people are buying Italian products, even though these are not necessarily imported from Italy itself. This underlines a kind of radiation effect, which emanates from the Italian and Mediterranean lifestyles in general and which expresses itself in an indisputable attraction for the products.

At the same time, floor-care products such as vacuum cleaners, personal-care items such as shavers and depilatory appliances, kitchen equipment, irons and kettles have all been imported from Italy. Altogether, according to the extrapolated figures of IFH Retail Consultants, total imports of small electrical appliances in this segment will amount to € 392 million in 2015. This corresponds to an increase of 13 percent over the last five years.

In summer, life increasingly takes place outside; be it in cafés, on open squares in town or in the garden at home. To make things at least as attractive outside as inside requires, of course, the appropriate **garden equipment**. Moreover, the increased volume of imports allows us to infer changing German attitudes to outdoor living. Altogether, Germans imported more than € 1 billion worth of garden equipment in 2015. 15 percent of that is from Italy. This includes goods such as garden chairs and tables, outdoor sofas and recliners, as well as other garden items such as ceramics and flowerpots.



Moreover, **small furniture items** play an important part in creating an Italian atmosphere in the home. The Italian products in this retail segment that have found their way onto the German market are worth € 106 million. This means that of all the small items of furniture that are imported into Germany, 12 percent of expenditure goes on items from Italy.



Germans drink 28 percent more coffee per capita than Italians.

Press release by the German Coffee Association (Deutscher Kaffeeverband), Hamburg, 1 April 2015.

Total imports into Germany from the world at large are growing slightly, whilst imports from Italy have declined since 2010 by around 30 million. In this segment we see a structural shift in imports towards other countries, who are responding more strongly to the demand for small items of furniture.

Bracelets, earrings, necklaces – even though imports from the top EU countries have declined slightly, no other EU country exports more jewellery to Germany than Italy does. Altogether Germans imported € 89 million worth of jewellery – largely gold, but also silver and fashion jewellery – from that ‘beautiful land’ that is Italy.

Italian domestic lighting is now being imported to the tune of € 58 million. Although overall imports of picture frames into Germany have grown slightly in the last five years, the value of picture frames coming from Italy has, conversely, dropped slightly. In 2010, the total number of Italian picture frames amounted to € 8 million worth, whilst, in 2015, that figure is now only € 5 million. In terms of watches, the trend was exactly the opposite. Five years ago, € 5 million worth of Italian watches were imported; now, in 2015, the figure for timepieces has risen to € 8 million. In spite of everything, however, the Swiss watch industry continues to be the major supplier for the world market.



Findings of the study – the poll of specialist retailers

Be it Anita Ekberg's famous dip in the Trevi Fountain from the 1960 film 'La Dolce Vita', the chirruping of the cicadas during that last holiday in Tuscany or the clattering Vespas in Rome's inner city – it matters little which memories dominate our personal image of Italy, one thing remains certain: in Germany, Italy stands for a quite particular lifestyle, for culinary delights, for a joy of life and an easy-going, southern European ambience. And they are all 'ingredients' that make life more agreeable.

It is, therefore, no great surprise to learn that the demand for Mediterranean products in specialist retail shops in Germany has continued at a consistently high level for years. At the same time, it is clear that the German retail trade not only offers products from Italy, but also many that echo Italian or Mediterranean products, without necessarily having been manufactured in Italy itself.

But which particular Mediterranean products does the German retail trade carry in their shops? What proportion of sales is achieved with Italian or Mediterranean goods? And is 'Made in Italy' a selling point for specialist retailers?

The IFH Institute for Trade Research put these and many other questions to retailers from various retail sectors. What emerges is an up-to-date picture of the topic, as well as a statement about future trends in the six specific retail sectors investigated: glass, porcelain and ceramics, furniture, electrical and leather goods, as well as garden centres and department stores.



Pizza, pasta and the like are the most popular food in Germany. When questioned, 61 percent of Germans gave Italian food as their favourite.

WAZ-online, 'Italian cuisine the most popular in Germany' (Italienische Küche in Deutschland am beliebtesten), www.derwesten.de, 17 April 2012.

One in three retailers carries Italian or Mediterranean products

Of the more than 600 retailers polled in November 2015, some 35 percent carried Italian products – or products inspired by Mediterranean tastes and styles – in their selections. This gives us a sample base of 210 specialist retailers who were then questioned for the present study.

The results of the interviews that were conducted clearly show differences between individual sectors. Whilst, in the case of specialist glass, porcelain and ceramics retailers and of garden centres, more or less one in two companies carry Mediterranean or Italian products, only one in five companies do so when it comes to the retail electrical trade. Amongst leather goods retailers, however, 38 percent of shops carry Italian or Mediterranean products. Even though Germany imports a relatively high number of products in this sector from Italy such as, for instance, the aforementioned women's handbags, these are not sold exclusively in specialist leather retail shops; they also find their way into department stores, fashion shops, flagship and concept stores, or are sold online.

Which of the retailers polled sell Italian products and products with Mediterranean flair?

(in %)



Source: IFH retail-trade poll, November 2015, n=608



Which Italian or Mediterranean products are carried by the retailers interviewed?

Around a quarter of the companies polled carried small domestic furniture for the home, either from Italy or with echoes of Italian styling. Immediately behind these are glass, porcelain and ceramic goods, together with lamps, each of which appear in the shops of one in five of the retailers. The picture is similar for personal accessories and decorative items, which are marketed by some 18 percent of retailers.

If you look at individual retail specialisms, these figures are significantly higher. For example, 87 percent of leather goods retailers carry Italian accessories in their shops. One out of every two department stores offers Italian foodstuffs and 43 percent of garden centres have Italian ornaments for sale.



From which product categories do you offer Italian products and products with Mediterranean flair in your shop? (Top mentions; multiple mentions possible)

	Total	Glass, porcelain and ceramic retailers	Furniture retailers	Electrical retailers	Leather-goods retailers	Garden centres	Department stores
Small pieces of furniture	25.6%	3.3%	72.9%	10.3%	3.3%	3.3%	13,8%
Glass, porcelain, ceramic	20.3%	53.3%	16.9%	3.4%		33.3%	17,2%
Luminaires / lamps	19.8%	3.3%	23.7%	75.9%		6.7%	6,9%
Personal accessories	18.8%	10.0%	6.8%	3.4%	86.7%	3.3%	13,8%
Decorative articles	18.4%	20.0%	16.9%	13.8%	3.3%	43.3%	13,8%
Household textiles	10.6%	16.7%	16.9%	3.4%	3.3%		17,2%
Food / gourmet gifts	9.7%	16.7%				3.3%	48,3%
Home textiles	9.2%	6.7%	15.3%	6.9%		6.7%	13,8%
Housewares	8.2%	23.3%	5.1%	3.4%		3.3%	17,2%

Source: IFH retail-trade poll, November 2015, n=210

Sales of Italian products

The proportion of turnover varies wildly according to product segment. So that, for leather goods retailers, sales of Italian products make up 25 percent of their turnover. For specialist electrical retailers, on average, 18 percent of total turnover is still attributable to goods from Italy. A similar figure can be found in furniture retail. There, the share of turnover for Italian goods is something like 16 percent. Glass, porcelain and ceramic retailers, on the other hand, whilst giving a fair amount of space to Italian products, sell less in relative terms – on average the share of total sales amounts to just 7.4 percent. For the whole sample of companies in the survey, the total proportion of turnover achieved with Italian or Mediterranean products turns out to be 14 percent.



What percentage of your total sales is accounted for by Italian products or products with Mediterranean flair?

	Total	Glass, porcelain and ceramic retailers	Furniture retailers	Electrical retailers	Leather-goods retailers	Garden centres	Department stores
Up to 2 percent	24.9%	37.0%	22.4%	14.8%	3.7%	44.0%	31.8%
Up to 5 percent	18.6%	25.9%	16.3%		11.1%	32.0%	31.8%
Up to 10 percent	22.6%	22.2%	24.5%	22.2%	33.3%	12.0%	18.2%
Up to 20 percent	14.7%	7.4%	10.2%	37.0%	25.9%	4.0%	4.5%
Up to 30 percent	9.0%	3.7%	16.3%	18.5%			9.1%
Over 30 percent	10.2%	3.7%	10.2%	7.4%	25.9%	8.0%	4.5%
Average value	14.3%	7.4%	16.1%	17.5%	24.5%	8.0%	9.6%

Source: IFH retail-trade poll, November 2015, n=210

Does more 'dolce vita' in the selection mean more customers?

One in every three of the retailers surveyed reports that Italian and Mediterranean products have led to greater interest amongst customers and /or increased customer numbers. Furniture retailers and department stores, in particular, see Italian selections as real crowd pullers.

But, in return, the companies make additional efforts themselves; some 60 percent of respondents draw customers' attention to the Italian and /or Mediterranean products they have with one or more promotional activities. Around half of the glass, porcelain and ceramics retailers, department stores and garden centres work with special presentations and displays. Closely followed by the leather goods trade, where 43 percent of the retailers interviewed indicated that they worked with special promotional and display areas. It is the department stores and garden centres, above all, that work with flyers or catalogues, in order to make their customers aware of Mediterranean products.



'Made in Italy' as a selling point

One in five of the specialist retailers in the survey told us that they used the 'Made in Italy' label as a selling point. A closer look at the individual retail segments here once again reveals deep differences: whilst 34 percent of leather goods retailers and 27 percent of electrical goods retailers use Italian manufacture as a quality mark with their customers, this is significantly less in evidence in department stores, with a figure of 13 percent and with specialist retailers of glass, porcelain and ceramics at 10 percent.



Latte macchiato and cappuccino are the most frequently drunk coffee specialities in Germany. Every German drinks 47 litres of them, on average, every year.

Kaffee-Kompass 2014/2015, German Coffee Association (Deutscher Kaffee-Verband), Hamburg, page 28.

The reason for this can be clearly identified in the various product segments. Leather handbags and accessories, just like coffee machines from Italy, enjoy a reputation for quality amongst consumers. The fact that a product has been made in Italy can therefore be a good argument for the customer to make the purchase.

What do customers associate with the 'Made in Italy' label?

Some 70 percent of specialist retailers interviewed reported that their customers associate a 'high quality look' with the 'Made in Italy' label. This perception is particularly marked in the electrical retail trade, with a figure of 93 percent. In second place comes 'special Mediterranean design', which is linked with products manufactured in Italy for 65 percent of retailers.

The 'Mediterranean lifestyle' criterion follows in third place, on average, for all respondents, at 56 percent. In this respect, both department stores and garden centres stand out: as far as department stores are concerned, 72 percent of respondents indicated that it was the 'Mediterranean lifestyle' above all that was important for their customers and for garden centres it was 68 percent. Taking all retail segments together, one out of every two retailers, on average, reported that their customers made the link between Italian goods and 'high quality'.

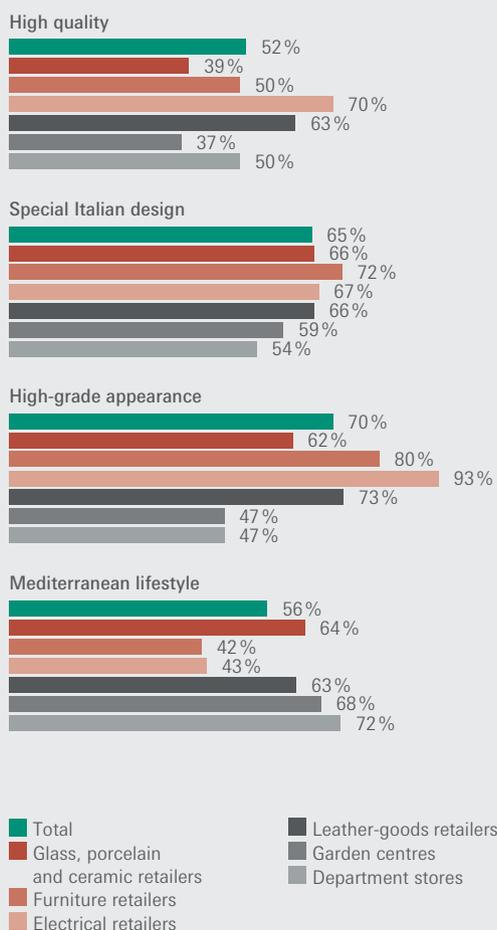


Buongiorno! Come stai? – Italian is one of the most popular foreign languages amongst Germans – immediately after English, Spanish and French.

Forsa, Society for Social Research and Statistical Analysis. (Gesellschaft für Sozialforschung und statistische Analysen mbH), Survey on Foreign Languages; 1,000 respondents aged 14 or older, countrywide survey, Federal Republic of Germany, January 2012.

What else do your customers associate with the label 'Made in Italy'?

(in %)



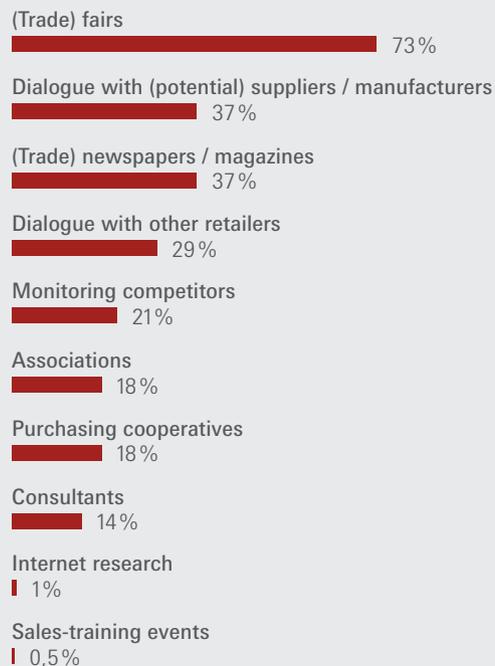
Source: IFH retail-trade poll, November 2015, n=210

Trade fairs are a source of information

When searching for Italian or Mediterranean products, independent retailers use trade fairs as their first line of approach, as a way of finding inspiration and learning about new products in this segment. Altogether, 73 percent of retailers reported this. Trade fairs have a particularly high value for the glass, porcelain and ceramics retail trade and for the electrical trade. 80 percent of glass, porcelain and ceramics retailers indicated that trade fairs are the major source of information for them. As far as electrical goods retailers are concerned, the figure was even higher at 90 percent. Discussions with suppliers or manufacturers and trade magazines or sector publications ranked in second place as sources of information for all respondents, with, in each case, 37 percent – thus coming in at a significantly lower level than trade fairs at the top.

How and where do you find out about Italian products and products with Mediterranean flair?

(multiple mentions ...)



Source: IFH retail-trade poll, November 2015, n=210

Prospects and trend forecast

How are sales of products from Italy or products with that special 'Italian feel' to them going to fare in the coming years? Overall, 66 percent of respondents across all retail segments expect that the proportion will remain at a similar level to what it has been so far. 18 percent assume that sales of Italian products will even increase in future. For the electrical goods sector and for department stores, as many as 27 percent in each case are of the opinion that Italian products may well contribute more towards the overall sales figures in future.

About Messe Frankfurt

Background information on Messe Frankfurt

Messe Frankfurt is one of the world's leading trade fair organisers, generating around €645* million in sales and employing 2,297* people. The Messe Frankfurt Group has a global network of 29 subsidiaries and 57 international Sales Partners, allowing it to serve its customers on location in more than 160 countries. Messe Frankfurt events take place at more than 40 locations around the globe. In 2015, Messe Frankfurt organised a total of 132* trade fairs, of which more than half took place outside Germany. Comprising an area of 592,127 square metres, Messe Frankfurt's exhibition grounds are home to ten exhibition halls. The company also operates two congress centres. The historic Festhalle, one of the most popular venues in Germany, plays host to events of all kinds. Messe Frankfurt is publicly owned, with the City of Frankfurt holding 60 percent and the State of Hesse 40 percent.

For more information, please visit our website at: www.messefrankfurt.com

** preliminary numbers (2015)*

ambiente

Ambiente, the leading international trade fair

Ambiente is the world's leading international trade fair for products for the table, kitchen and household, gift articles, jewellery, wellness and fashion requisites, as well as decorative products, interior design concepts and furnishing accessories. Ambiente is 'The Show' for the entire sector and, thanks to its unique horizontal and vertical range of products, unrivalled worldwide. The world's leading consumer-goods fair is also distinguished by a wide variety of events, promotional programmes for young designers and companies, trend presentations and awards ceremonies.

tendence

Tendence, the international consumer-goods event

Tendence (27 to 30 August 2016) is Germany's most international and biggest order fair in the second half of the year and is distinguished by an extensive portfolio of products from the living, furnishing, decorating, gift articles, jewellery and fashion requisites sectors. At this new-product platform, top brands and key players present their Christmas trends and thus offer the national and European retail trade the chance to place follow-up orders for the Christmas season. Simultaneously, exhibitors show their collections for the coming spring and summer season.

Whether coffee and espresso machines, leather bags, gift articles or culinary delights, products from Italy are constantly recurring items on German shopping lists. And have been so for decades. But how important is Italy really as an import country for Germany? What proportion of its turnover does the German retail trade make with products from the other side of the Alps? And, last but not least, what does the label 'Made in Italy' mean for German consumers? To provide answers to these questions, Messe Frankfurt asked IFH Retail Consultants from Cologne to conduct a survey. The result: Italy is not only one of Germany's most important trading partners but also a magnet for customers with Mediterranean products leading to greater customer interest and more customers in the shops. Moreover, Italian products and products distinguished by Italian flair have grown in significance at the point of sale over recent years.

ambiente tendence

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