

Online press conference on 21 January 2023 - press kit

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ISM
23.04. - 25.04.2023
www.ism-cologne.com

No. 5 / November 2022, Cologne
#ism

The key theme of ISM 2023, namely "Encourage. Enable.Excite!", places a stronger emphasis on the current themes and challenges of the industry

A joint event and congress programme with the special edition of the supplier trade fair ProSweets Cologne, taking place parallel, promotes exchange aimed at new solutions

The sweets and snacks industry, like many other industries, is facing unprecedented challenges. Alongside the ongoing effects of the corona pandemic, the central problems are above all the Ukrainian war and the related volatile markets, increases in the prices of energy and raw materials, as well as disrupted supply chains. However, ongoing themes revolving around digitalisation at the POS, as well as the sustainability, transparency and origins of products and ingredients still continue to play a central role. Resilience and the sustainable, resource-saving production of sweets and snacks is called for more than ever.

In its role as the leading international trade fair for the sweets and snacks industry, the ISM engages actively in these market events, thus shifting the focus in the coming year more to important content and discussions revolving around these challenges with the main theme of "ISM - Encourage.Enable.Excite!".

"Under the flag of our new key theme, in addition to the classic product presentations, we will be relying increasingly on an exchange and discussions at ISM 2023. It is important to us in these times that the industry allow more space for its innovative solutions and new approaches, and promote the opportunity for exchanging experiences in the scope of event and networking formats", explains Sabine Schommer, Director ISM.

The first highlights of the event and congress programme, being planned together with ProSweets Cologne 2023 - Special Edition taking place parallel, have already been set. Thus, for example, Euromonitor, the partner of both trade fairs of many years, will discuss the effects of inflation on the sweets and snacks market in Europe under the title "Inflation Surge and its Impact on Snacks". The industry sponsor of ProSweets Cologne, DLG, will also discuss approaches to solutions for the global procurement of raw materials and energy efficiency in sweets production on the Expert Stage.

In addition to this, the networking format #CONNECT2030 will continue on the trade fair Monday, 23 April 2023 on the Expert Stage. Here, representatives from production and packaging, as well as from industry and trade will dedicate themselves in particular to the impact of the energy crisis and the lack of raw materials in the sweets industry. The event will then offer all participants and



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speakers the possibility to exchange ideas with the industry pros and to establish new business contacts along the entire value creation chain under the motto "Meet the Speakers".

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Koelnmesse - industry trade fairs for the food and beverage sector: Koelnmesse is an international leader in organising trade fairs in the food and beverage segment. Events such as Anuga and ISM are established, world-leading trade fairs, hosted in Cologne/Germany. Anuga HORIZON in Cologne will mark the launch of an additional event format dedicated to food industry innovations. In addition to the events at its Cologne headquarters, Koelnmesse also stages numerous food trade fairs with different sector-specific areas of focus and content in further key markets across the world, including Brazil, China, India, Japan, Columbia, Thailand and the United Arab Emirates. These global activities enable Koelnmesse to offer its customers bespoke events and leading regional trade fairs in a variety of markets, thus creating the foundation for sustainable international business. Koelnmesse is also ideally positioned in the field of food technology with its leading international trade fairs Anuga FoodTec and ProSweets Cologne and its global network of satellite events.

Further information: <https://www.ism-cologne.com/fair/industry-trade-fairs/>

The next events:

ANUFOOD Brazil - International Trade Show Exclusively for the Food and Beverage Sector, São Paulo 11.04. - 13.04.2023

ISM Japan - The dedicated showcase for Sweets & Snacks in Japan, Tokyo 12.04. - 14.04.2023

Wine & Gourmet Japan - International Wine, Beer, Spirits, Gourmet Food and Bar Exhibition & Conference, Tokyo 12.04. - 14.04.2023

ISM - The world's largest trade fair for sweets and snacks, Cologne 23.04. - 25.04.2023

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No. 3 / September 2022, Cologne
#prosweetscologne

ProSweets Cologne 2023 - Special Edition is relying on a compact format

The supplier fair for sweets and snacks is offering attractive complete stand packages for exhibitors - a stronger content-related interlinking with the co-staged ISM

After the announcement that the event is being postponed from 29.01.-01.02.2023 to 23.-25.04.2023, the preparations for ProSweets Cologne 2023 - Special Edition are in full swing. Against the backdrop of the huge challenges facing the entire sweets and snacks industry, the 2023 edition is being held as a compact and agile Special Edition parallel to ISM in the halls of Koelnmesse.

"We are totally convinced that it was the right decision to stage ProSweets Cologne as a Special Edition parallel to the International Sweets and Biscuits Fair," stated Claire Steinbrück, Vice President Trade Fair Management. "The prominent location of ProSweets Cologne on the Central Boulevard - i.e. in the heart of the ISM - underlines the content-related interlinking between the two fairs, which is additionally enhanced by an aligned event programme," Claire Steinbrück added.

For the Special Edition the supplier fair for sweets and snacks is exclusively offering exhibiting companies complete stand packages in three different executions. For last-minute exhibitors these packages can be booked up until 15.12.2022 via the website at <https://bit.ly/3M2JAU9> at the early bird discount. As usual, the focus lies on the four exhibition segments "packaging and packaging materials", "production and packaging technology", "operating equipment and auxiliary devices" as well as "raw materials and ingredients".

Attractive event and congress programme

In addition to the current and future-oriented specialised topics, supply-chain related themes of the new era, changes to the export-oriented geostrategy or energy and resource shortages will also be integrated into the programme. The initial highlights of the event and congress programme have already been set. Thus, for example, Euromonitor, the partner of both trade fairs for many years, will discuss the effects of inflation on the sweets and snacks market in Europe under the title "Inflation Surge and its Impact on Snacks". The industry sponsor of ProSweets Cologne, DLG, will also discuss approaches to solutions for the global procurement of raw materials and energy efficiency in sweets production together with the ISM on the joint Expert Stage.

In addition to this, the networking format #CONNECT2030 will continue on the Expert Stage on the trade fair Monday, 23 April 2023. Here, representatives from production and packaging, as well as from the industry and trade will dedicate



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themselves in particular to the impact of the energy crisis and the lack of raw materials in the sweets industry. The event will then offer all participants and speakers the possibility to exchange ideas with the industry pros and establish new business contacts along the entire value creation chain under the motto "Meet the Speakers".

Koelnmesse - industry trade fairs for the food technology sector: Koelnmesse is an international leader in organising trade fairs in the field of food and beverage processing. Anuga FoodTec and ProSweets Cologne are established, world-leading trade fairs, hosted in Cologne/Germany. In addition to the events at its Cologne headquarters, Koelnmesse also stages further food technology trade fairs with different sector-specific areas of focus and content in key markets across the world, including India, Italy and Colombia. These global activities enable Koelnmesse to offer its customers bespoke events and leading regional trade fairs in a variety of markets, thus creating the foundation for sustainable international business. Koelnmesse is also ideally positioned in the field of food and beverages with its leading international trade fairs Anuga and ISM and its global network of satellite events.

Further information: <https://bit.ly/3Rln1fV>

The next events:

Cibus Tec Forum - Exhibition & Conference on Food & Beverage Technologies Trends, Parma 25.10. - 26.10.2022

ProSweets Cologne 2023-Special Edition - The international supplier fair for the sweets and snacks industry, Cologne 23.04. - 25.04.2023

Cibus Tec - Inspiring Innovation in Food and Beverage Technologies, Parma 24.10. - 27.10.2023

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Confectionery trade benefits strongly from the EU internal market

Presentation by Ulrich Zuenelli,
Chairman of the Supervisory Board of the international confectionery trade association
SWEETS GLOBAL NETWORK e.V. and Deputy Chairman of the
of the Committee for the International Sweets and Biscuits Fair (AISM)

30 years ago, on 1 January 1993, the EC internal market, today the European Economic and Monetary Union, began a success story that is unique in the world. That this also applies to foreign trade in confectionery is shown by a comparison of the import figures for 1992 with 2022.

Originally, the twelve EU countries Belgium, Denmark, Germany, Ireland, Greece, Spain, France, Italy, Luxembourg, the Netherlands, Portugal and the United Kingdom formed the single market, which today comprises 26 member states plus Iceland, Liechtenstein and Norway, with Switzerland having partial access. It is a powerful economic bloc with almost 500 million people and a GDP of €15 trillion.

A comparison of confectionery imports in 1992 with 2022 shows the immense dynamics that foreign trade in confectionery has experienced in these years. For example, the total quantity of imported confectionery increased by 192 percent from 550,486 tonnes to 1.606 million tonnes. The value of imported goods from the segments chocolate goods/semi-finished chocolate products, sugar confectionery, fine bakery products, snacks and ice cream increased by 308 per cent from 1.481 billion euros to 6.057 billion euros. (Source: Federal Association of the German Confectionery Industry BDSI).

The strongest performance in these 30 years has been achieved by the snack product group: Imports increased in volume by 768 per cent from 21,897 tonnes to about 190,000 tonnes last year. The value increased by 852 percent to 590 (1992: 62) million euros during this period. Furthermore, the business development of chocolate

products, fine bakery products and ice cream is relatively close to each other: in value terms, imports of chocolate products and semi-finished chocolate products rose by 370 per cent from 1.481 billion euros in 1992 to now 3.255 billion euros, while bakery products increased by 351 percent to 943 (1992: 269) million euros. The import value of ice cream in 2022 was 433 million euros - 329 percent above the 1992 level of 101 million euros. At the same time, the amount of imported ice cream increased by 369 percent from 40,544 tonnes in 1992 to about 150,000 tonnes. Suppliers of chocolate products increased the volume by 201 per cent to 759,000 (1992: 251,804) tonnes, while fine bakery products increased from 102,263 tonnes to 285,000 tonnes (+ 179 per cent). Only sugar confectionery lagged behind the general trend with a 75 per cent increase in volume to around 169,000 (1992: 96,570) tonnes worth 641 (1992: 282) million euros, an increase of 127 per cent.

Portugal and Poland record the highest growth rates

A look at the main supplier countries 30 years ago and today shows that the Eastern European countries in particular have experienced a quantum leap - often almost from zero to an increase rate of 1,000 percent and more. Outstanding in this field is Poland, which today ranks third with a delivery volume of 249,801 tonnes worth 907 million euros, Poland ranks third among all supplier countries. After all, the neighbouring country - starting from 2,641 tonnes - increased the quantity by 9,358 percent and the value by 7,558 percent (1992: € 1.2 million). But also the Czech Republic (+ 1,295 % in quantity, + 1,703 % in value), Slovakia (+ 1,257 %, + 2,627 %) and Hungary (+ 441 %, + 373 %) also significantly increased their confectionery imports to Germany.

Portugal made the biggest leap of all in the past 30 years - albeit at a very low level. The country increased its deliveries to Germany from 24 tonnes in 1992 to 3,572 tonnes, which corresponds to a growth rate of 14,783 percent. During this period, the value increased by 17,666 percent from 60,000 euros to 10.6 million euros today. Spain also achieved a respectable rate of increase with a volume increase of 922 percent to 51,224 (1992: 5,008) tonnes worth €150 million (1992: €16.8 million, + 793 %) in 2021.

The leading supplying nations of 1992, the Netherlands and Belgium/Luxembourg, maintained their top positions despite lower growth rates in some cases. The Netherlands increased their deliveries by 70 per cent from 214,864 tonnes to 364,933 tonnes worth 1.22 billion euros (+ 151 %t), while Belgium/Luxembourg increased their deliveries by 226 per cent from 83,142 tonnes to 271,081 tonnes; the value increased in this period from 230 million euros by 289 per cent to 895 million euros.

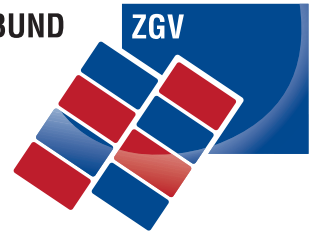
Denmark and the USA, however, stand out as suppliers of confectionery to Germany. Imports from Denmark decreased by 29 per cent from 24,373 tonnes in 1992 to 17,326 tonnes; the value increased slightly by 16 per cent from 72.1 million euros to 83.6 million euros. The USA does not play a significant role as a supplier of confectionery to Germany either: the volume increased by only 7 per cent from 2,826 tonnes to 3,014 tonnes in the 30 years, although the value increased by 165 per cent from 6.7 million euros to 19.4 million euros.

And finally, there are the states that were not yet included among the main supplier countries in 1992. Côte d'Ivoire and Ghana, with delivery volumes of 26,755 tonnes (value: € 88.7 million) and 24,208 tonnes respectively, are (€ 78.4 million), respectively, have moved up into the top 15. Indonesia has also reached a significant level with a volume of 14,293 (worth € 59.2 million). All three supplier countries are successful with their strategy of producing cocoa and chocolate semi-finished products in their own country. In addition, there are numerous Eastern European countries that did not play a role in the international confectionery trade in 1992 immediately after the political change. In the meantime, the import volumes from Bulgaria, Lithuania, Russia, Ukraine, Croatia, Romania, Latvia and Estonia are quite respectable.

Besides the opening of borders, the International Sweets and Biscuits Fair ISM in Cologne has played a very important role in the development of these trade relations in Europe and worldwide. This year, the manufacturers, importers, distributors and buyers of confectionery from all over the world will again meet in Cologne - in a change from the normal rhythm - from 23 to 25 April 2023.

Source: Sweets Global Network e.V., München

Contact: Hans Strohmaier, h.strohmaier@sg-network.org



International Confectionery Fair (ISM) 2023

Statement by Dr. Ludwig Veltmann,

Chief Executive DER MITTELSTANDSVERBUND - ZGV e.V. and member of
AISM

Trade 2022: Sustainability continues to be a trend

It was a challenging year for the confectionery trade. The Russian war of aggression in Ukraine has been going on for almost a year and there is still no end in sight. Accordingly, 2022 was marked by pervasive economic uncertainty. High energy and food costs made many consumers tighten their belts. Nevertheless, confectionery sales remained stable. Only a slight increase of 0.2 per cent was recorded. Overall, the confectionery business accounts for a share of about 12 percent of total food sales. This is shown by the trend figures that **DER MITTELSTANDSVERBUND** determined together with the **German Retail Association (HDE)**.

Overall, it is remarkable that the confectionery business has been so stable in 2022. The industry also suffered from the very hot summer – there was a drop in sales of chocolate products, for example. And due to the surprising early elimination of the German national team from the 2022 World Cup in Qatar and the widespread protests in the run-up to and during the tournament, the initially expected positive impulses were almost non-existent. In addition, Christmas sales coincided with the World Cup for the first time this year, which initially made forecasts more difficult. Nevertheless, there was an upswing in the private label segment and also an overall positive sales development in the Christmas business. Advent calendars and Chocolate Santa Clauses were particularly popular with consumers. And the interest in vegan, sustainable and conscious nutrition also increased during the Christmas season. At

the same time, the willingness to buy premium products dropped significantly during the Christmas season.

Easter was also slow to gain momentum and was worse than in 2021. One of the key factors here is probably the declining importance of Easter among consumers.

The industry in detail

Not all distribution channels were able to achieve sales increases in 2022. There was less demand for chocolate bars, high-priced chocolate products such as pralines with and without alcohol – as well as jelly and puffed rice.

Salty snacks such as crisps were the absolute best-sellers – but also snacks in the context of a healthy and conscious diet were sales drivers. Sports and energy bars were also very popular, as were fruit gums, liquorice, chewy sweets and chewing gum. Ice cream was also up due to the weather, and sugar confectionery and long-life bakery products were also in the culinary focus of consumers.

Own brands develop well

The trend towards private labels has also emerged in 2022. Their importance for the trade is growing steadily. Last year, private labels accounted for 20 percent of total confectionery sales. The number of articles increased by a total of almost 8 percent. The shopping experience and product presentation are playing an increasingly important role. What is needed here is more authenticity, emotions, more face and a story that wants to be told.

At the same time, consumers are increasingly paying attention to special offers.

Trends 2023

The interest in sustainable products has become even stronger in the confectionery business over the past year. In particular, sales of vegan products or organic and fair trade items have increased – and influencer advertising is playing an increasingly important role in this.

Already now, special promotion periods such as "Veganuary" are no longer a rarity. Consumers are watching very closely – so optimising recipes, ingredients and packaging will continue to play a crucial role in 2023.

Supply chains and prices

The purchase of confectionery and ice cream was significantly more expensive in 2022 than in the previous year – retailers had to pass this on to some extent to their customers. In addition to energy cost increases, the strained supply chains with limited availability of goods, raw material cost increases and significant price increases for transport, logistics and packaging also proved to be a major challenge.

Outlook

Despite numerous challenges, the outlook for the future is cautiously optimistic: the companies expect sales to trend upwards in 2023 and the trend of private labels to become stronger. Supply chains could also continue to ease in the new year.

It is becoming increasingly important that all stages of the confectionery value chain work closely together. The ISM is and will remain an important platform and source of inspiration. In 2023, the trade is determined to make its customers happy with innovative and emotional offers.

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German Confectionery Industry at a Glance

Estimated figures for 2022



Inland Production

4,035,000 t (+2.8%)
14.0 bill. EUR (+6.5%)



Total Exports

2,465,000 t (+4.0%)
10.3 bill. EUR (+11.5%)



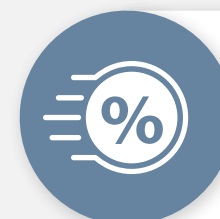
Export Quota

54% (volume)
67% (value)



Total Imports

1,606,000 t (-4.0%)
6.1 bill. EUR (+2.8%)



Import Quota

40% (volume)
47% (value)



Consumption

2,659,500 t (-1.8%)
9.0 bill. EUR (+0.2%)



Number of Employees

approx. 60,000

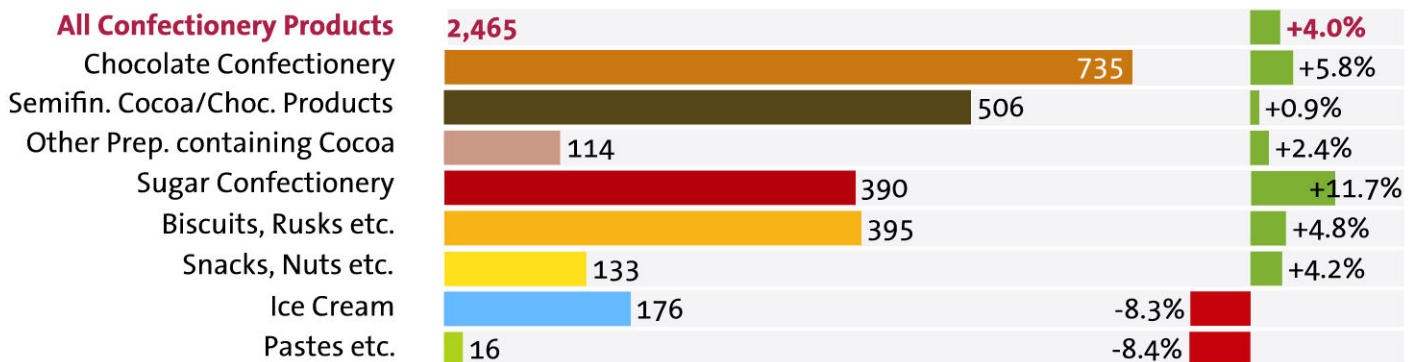
Free use for the public press – any other commercial use is forbidden. Confectionery: Chocolate Confectionery, Semifinished Cocoa and Chocolate Products, Other Preparations containing Cocoa, Sugar Confectionery, Biscuits, Rusks etc., Snacks, Nuts etc., Ice Cream, Chewing Gum and Pastes etc. Production and Consumption without Spreads containing Cocoa. Estimation of Consumption without Semifinished Cocoa Products and Pastes.

Source: Estimated figures BDSI based on the figures of the Federal Statistical Office and market research institutions.

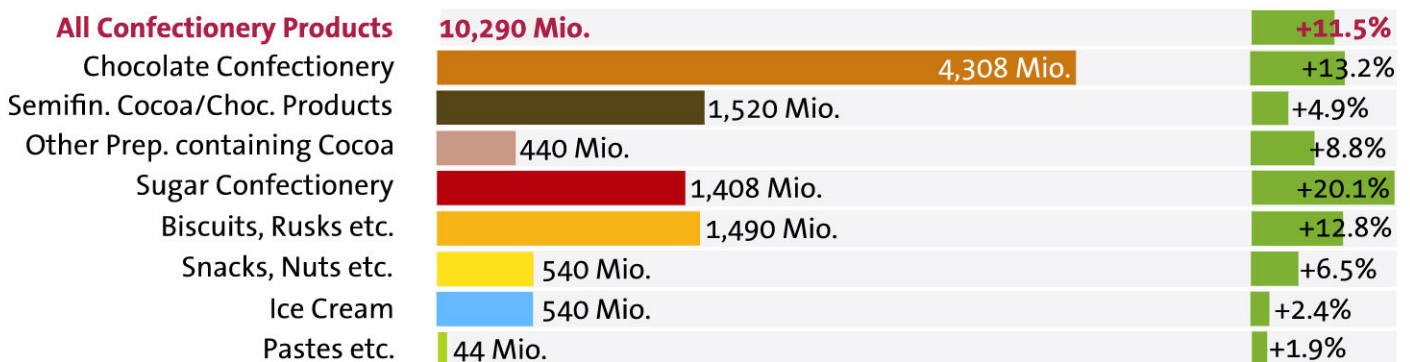
German Exports of Confectionery Products 2022

(Estimated figures for 2022 - Difference 2022 to 2021 in %)

Quantity in 1,000 tons



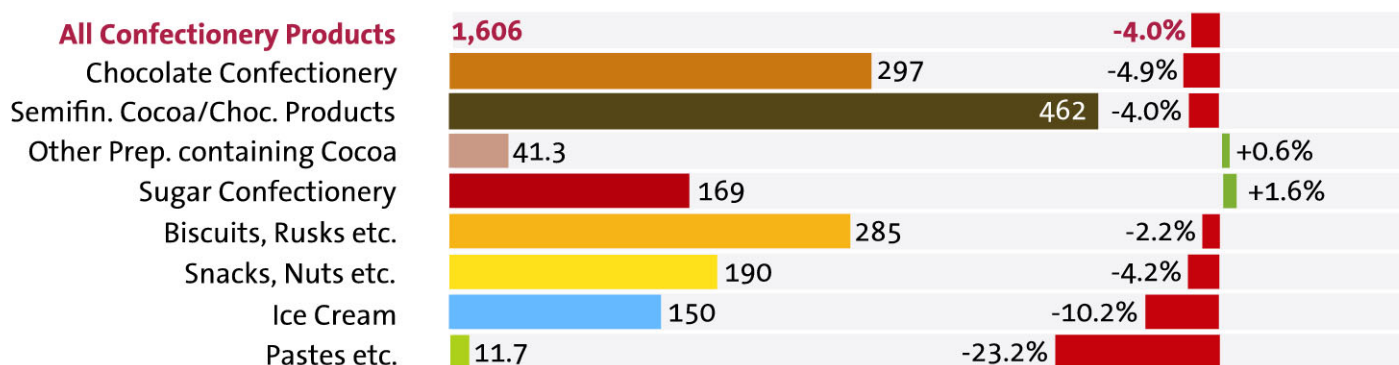
Value in Euro



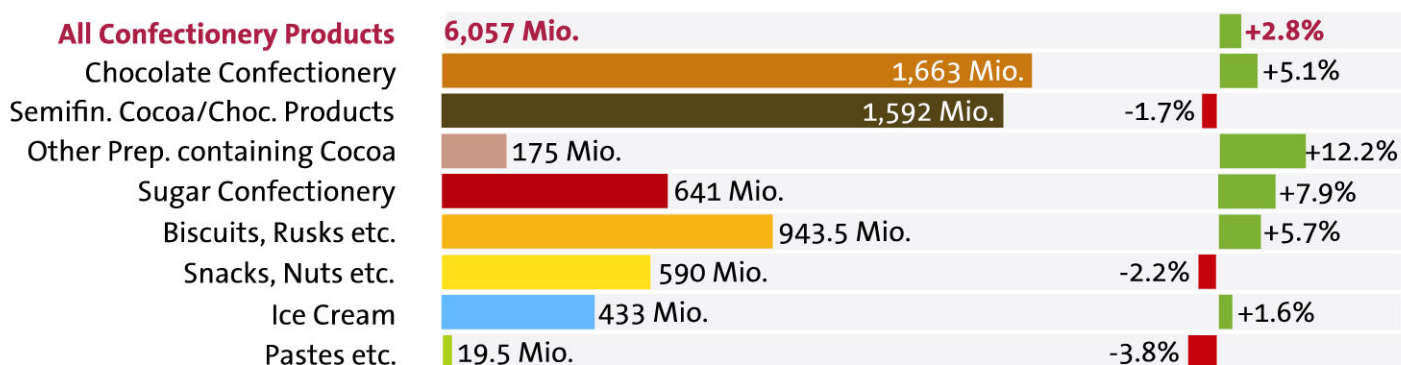
German Imports of Confectionery Products in 2022

(Estimated figures for 2022 - Difference 2022 to 2021 in %)

Quantity in 1,000 tons



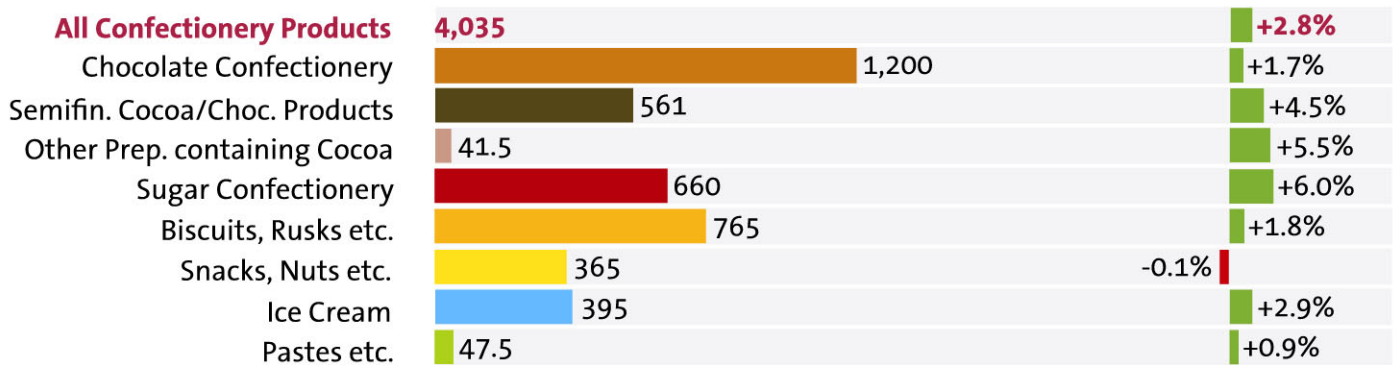
Value in Euro



German Production of Confectionery Products 2022

(Estimated figures for 2022 - Difference 2022 to 2021 in %)

Quantity in 1,000 tons



Value in Euro

