

Thaifex - Anuga Asia PR Event



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Anuga
04.10. - 08.10.2025
www.anuga.com

Agenda PR event at Thaifex - Anuga Asia

Agenda PR Event
28.05.2025 Bangkok, Thailand



Anuga
04.10. - 08.10.2025
www.anuga.com

Agenda

Welcome and introduction

Alex Macgregor
Senior PR Consultant at MSL Group

Anuga Worldwide

Oliver Frese
COO Koelnmesse

Anuga Cologne

Bastian Mingers
Vice President Food and FoodTec at Koelnmesse

Politicisation of nutrition in Germany

Franz-Martin Rausch
Chief Executive of the German Food Retail Association (BVLH)

Consumer Trends 2025 in Asia

Fellicia Kristianti
Insights and Innovation Analyst at Innova Market Insights

Fireside Chat

Q&A, Closing Remarks and Photos

Networking

Stand: 22.05.2025

Kürzel: hfr



THE NO.1 FOR
FOOD &

**BEVERAGE
BUSINESS**





THAIFEX – ANUGA ASIA
Welcome to our PR event



Agenda PR Event

28.05.2025 Bangkok, Thailand

Welcome and introduction (Alex Macgregor, Senior PR Consultant at MSL Group)

Anuga Worldwide (Oliver Frese, COO Koelnmesse)

Anuga Cologne (Bastian Mingers, Vice President Food and FoodTec at Koelnmesse)

Politicisation of nutrition in Germany (Franz-Martin Rausch, Chief Executive of the German Food Retail Association (BVLH))

Consumer Trends 2025 in Asia (Fellicia Kristianti, Insights and Innovation Analyst at Innova Market Insights)

Fireside Chat

Q&A, Closing Remarks & Photos

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Welcome and Introduction

Alex Macgregor, Senior PR Consultant at MSL Group



Anuga Worldwide

Global context, overview of the global portfolio and importance of the Asian market

Oliver Frese, COO at Koelnmesse



Global context: F&B world market & current challenges

- The global food and beverage industry is currently facing profound changes. Global crises, geopolitical shifts and an increasing need for sustainable solutions are shaping market developments – and presenting companies and organisers alike with new challenges and opportunities.
- Geopolitical shifts are changing trade flows (e.g. new alliances, regionalisation)
- Inflation & commodity prices are influencing production and consumption behaviour worldwide
- Sustainability is characterising purchasing decisions and market access
- Digitalisation & AI are changing product development, supply chains & marketing
- Asia as a driver of innovation and consumption – increasing demand for quality, health & convenience
- Trade fairs as neutral platforms for orientation, networking & market development



Global context: F&B world market & current challenges

- In this dynamic environment, international trade fairs such as Anuga and THAIFEX - Anuga Asia are becoming increasingly important: They offer orientation, promote dialogue across borders and create stable platforms for sustainable growth.
- At the same time, they provide companies with access to new markets, direct dialogue with decision-makers - and thus concrete impetus for business development and innovation.

Koelnmesse's internationalisation strategy

- Global presence: Koelnmesse in the world's growth markets
- Active markets like Brazil, China, India, Italy, Japan, Colombia, Thailand
- Koelnmesse's strategic approach includes international trade fair formats, strategic partnerships and thematic specialisation
- Target markets:
 - Strong growth potential in the food sector
 - High demand for innovation in processing & packaging
 - Need for international business platforms

Internationalisation: Strategic focus & objectives

- Our events serve as platforms for specific focuses in food, addressing local market needs
- Strategic characteristics:
 - Comprehensive and long-term growth-oriented
 - Regionally adapted, aligned with global trends (e.g. sustainability, digitalisation, alternative proteins)
- Key objectives:
 - Build global platforms to foster international business
 - Strengthen regional markets with localised formats
 - Secure Cologne's leading trade fairs long-term

#weareAnuga





Anuga worldwide

2025



THAIFEX – Anuga Asia
Bangkok, Thailand
27.05.–31.05.2025



Anuga Select India
Mumbai, India
20.08.–22.08.2025



Anuga
Cologne, Germany
04.10.–08.10.2025

2026



THAIFEX – HOREC Asia
Bangkok, Thailand
11.03.–13.03.2026



Anuga Select Brazil
Sao Paulo, Brazil
07.04.–09.04.2026



Anuga Select Japan
Tokyo, Japan
15.–17.04.2026



Anuga Select China
Shenzen, China
27.04.–29.04.2026



SIGEP China
Shenzen, China
27.04.–29.04.2026



TUTTOFOOD Milano
Milano, Italy
11.05.–14.05.2026



Alimentec – Anuga Select Colombia
Bogotá, Colombia
09.06.–12.06.2026



Global figures for our food portfolio

- Exhibitors: 12,747
- Visitors: 403,745
- Exhibition Area: 486,077 m²

Importance of the Asian Market for Anuga

- The Asian market plays a central role in Koelnmesse's internationalisation strategy - both in economic and strategic terms.
- Asia as a growth driver: The dynamic market development and increasing demand for innovative foods make the region a decisive future market for the global food industry.
- THAIFEX - Anuga Asia as a key trade fair: It is the leading platform in the Asian region and firmly anchored in the international Anuga portfolio.
- Market access for US companies: The cooperation makes it easier for small and medium-sized US companies in particular to enter Asian markets, thus promoting global trade.
- Future-orientation: Topics such as food security, sustainability and innovation are moving even more strongly into focus - THAIFEX is being positioned as a platform for solving global challenges.

German food trade with Thailand powered by BVE

Main export goods from Germany to Thailand

	Exports 2024*	Change compared to 2023
	In mio. of €	in %
Processed meat	31,6	-31,3
Milk and dairy products	22,6	-28,8
Starch and starch products	11,6	+13,6
Spice plants	10,1	-3,9
Confectionery (excluding baked goods)	9,9	-16,6
Feed for farm animals	9,6	+0,6

Main import goods from Thailand to Germany

	Imports 2024*	Change compared to 2023
	In thousands of €	in %
Prepared feed for other animals	120,9	+33,7
Processed meat	105,7	+0,9
Seasonings and sauces	50,2	+15,6
Processed fruit and vegetables, n.e.c.	28,6	-13,9
ready meals	28,5	-19,6
Fish products and other seafood	27,6	+0,1

German foreign trade with Thailand: processed food

	2024*	Change compared to 2023
	In mio of €	in %
Exports from Germany	147,6	-16,0
Imports to Germany	467,5	+6,0

* Preliminary figures.

Source: Federal Statistical Office, BVE

Anuga Cologne News, highlights and outlook

Bastian Mingers, VP Food and
FoodTec at Koelnmesse



Anuga in numbers



WHERE OUR EXHIBITORS COME FROM

Europe* **4,310** · Asia **1,763** · America **880**
Africa **312** · Oceania **34**

TOP COUNTRIES OF ORIGIN OF THE EXHIBITORS*

1 Italy	5 Greece	9 Belgium
2 China	6 The Netherlands	10 Argentina
3 Spain	7 Poland	
4 Türkiye	8 France	

*excl. Germany

WHERE OUR VISITORS COME FROM

Europe* **67,458** · Asia **21,044** · America **13,484**
Africa **5,243** · Oceania **1,292**

TOP COUNTRIES OF ORIGIN OF THE VISITORS*

1 The Netherlands	6 France
2 Italy	7 Poland
3 Great Britain & Northern Ireland	8 China (incl. Hong Kong+Macao)
4 Türkiye	9 Belgium
5 Spain	10 USA

*excl. Germany



Facts and figures

- Anuga is the largest trade fair for food and beverages and the international trade and marketplace for the global industry
- Anuga takes place every two years in Cologne
- Ten specialised trade fairs: Anuga Alternatives, Anuga Bread & Bakery, Anuga Chilled & Fresh Food, Anuga Dairy, Anuga Drinks, Anuga Fine Food, Anuga Frozen Food, Anuga Hot Beverages, Anuga Meat, Anuga Organic
- Sustainable growth remains key theme of Anuga 2025
- Around 1,800 exhibitors and approximately 21,000 visitors come from the Asian region – a clear indication of Asia's vital role in international exchange and the development of the food industry



News

- Since Anuga 2023, we have implemented several strategic changes to strengthen Anuga's position as the world's largest international trade and marketplace for the global food and beverage industry.
- Introduction of Anuga Alternatives, the new trade fair for alternative protein products from plants, fungi, algae and cell cultures
- New stage: The Anuga Horizon Stage focusing on alternative proteins and future foods
- Newly designed hall structure: Theme-based sections such as Anuga Alternatives and Anuga Organic are moving closer together – this promotes synergies, enables shorter routes and an overall more efficient trade fair visit
- Anuga Fine Food is located on the ground floor of the newly built Confex and offers a modern and inviting atmosphere.
- The Boulevard of Innovation combines the Anuga Trend Zone, Start-ups and the Anuga Taste Innovation Show



Highlights

- The Partner country Korea combines innovation with culinary tradition
- Introduction of the brand-new Anuga Alternatives
- Special Shows such as the Anuga Organic Market, the Anuga Halal Market and the Anuga Taste Innovation Show
- The Boulevard of Innovation (Anuga Trend Zone, Start-ups and Anuga Taste Innovation Show) presents the latest trends of the industry
- Stages such as the Anuga Trend Zone, Organic on Stage and the Horizon Stage showcase topics of the future
- High-level conferences, prestigious award ceremonies and evening events offer both in-depth insights and valuable opportunities to connect and exchange ideas with key players from across the industry
- At Anuga, top exhibitors meet decision-makers and buyers from the retail and food service/out-of-home market. The high quality on both sides makes Anuga the leading order and export platform

Politicisation of nutrition in Germany

Franz-Martin Rausch, CEO
German Association of the
Retail Grocery Trade (BVLH)



Consumer Trends 2025 in Asia

Fellicia Kristianti, Insights and
Innovation Analyst at Innova
Market Insights



Fireside Chat



Q&A and Interview Opportunities



Media Networking





Your press contact

Public and Media Relations Manager Jana Hohlfinger

j.hohlfinger@koelnmesse.de

+49 176 1256 3133



German food trade with Thailand

-selected results-

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* Preliminary figures.

Source: Federal Statistical Office, BVE

Food trade in Germany

An overview



German Federation of Food Retailers (BVLH)

BVLH safeguards the food policy interests of companies in the German food trade vis-à-vis legislation, authorities and the public (including NGOs).

- We are the contact point for politics, media, consumer organisations and associations of the upstream economic levels. We prepare branch positions on draft legislation (Germany, EU)
- We represent the positions of the companies at hearings, expert discussions and other events.
- We represent retailers in government committees and advisory bodies.
- We offer our members support in technical and legal issues relating to food.



The Sector

- The food retail sector generates 306.9 billion euros in sales (85 percent / 260.7 billion euros in food).
- Food retail accounts for 5 percent of the German GDP.
- The four largest companies – Edeka, Rewe, Schwarz Group (Lidl, Kaufland) and Aldi – have a market share of 76 percent.
- The share of discounters is comparatively high, which is reflected in very strong competition and low margins.
- The German food retail trade (LEH) operates more than 37,000 stores out of a total of 36.8 million. square meters of sales area.
- Retailers offer a wide range of products with up to 63,000 items for the various needs of the 42 million households.
- Around 1.3 million employees and 32,000 trainees work in the food retail sector.
- International: 8 of the global top 20 retailer are from Germany.

Market structure by type of business

Net turnover by type of business



Supermarket

Sales area 400 to 2,500 m²
Full food range and non-food 1 and non-food 2 in smaller sales area shares

- 10,998 shops
- 11.2 million m² of retail space
- 65.4 billion euros in sales

Hypermarket

Sales area at least 5,000 m²
Full range of food and non-food 1 and non-food 2 wide range

- 719 shops
- 4.8 million m² of sales space
- 20.5 billion euros in sales

Large Supermarket

Sales area 2500 to 5000 m²
Full-range food and non-food 1 and 2

- 1,269 shops
- 4.2 million m² of retail space
- 22.3 billion euros in sales

Discounter

Exclusively self-service, limited food range concentrated on high-turnover items and non-food 1 and 2 as promotional goods

- 15,972 shops
- 13,2 million m² of retail space
- 97,6 billion euros in sales

Market Overview: Development of the Market

- In times of the Corona pandemic, trends have intensified and in some cases stabilized:
 - *Trading-Up*: Less spending on gastronomy due to restrictions. As a result, more budget for high-quality products for home consumption and greater sustainability awareness (e.g. organic and regional demand).
 - *Cocooning*: More food consumption at home and thus more cooking, more stockpiling.
 - *Cooking as an experience*: More time at home and social media platforms promoted creative recipe trends.
 - The *war* in the Ukraine has led to an increase in energy and food prices. As a result, many German consumers are significantly more price-sensitive.

Trends: Politicisation of the food landscape

Animal welfare:

- Improving animal welfare beyond state requirements is a complex task for society as a whole.
- All partners in the value chain – agriculture, the meat industry, the food retail trade – work together and make it recognizable to the consumer on the product by means of labeling.
- This is based on minimum requirements for the husbandry levels, which are strictly controlled. The private sector finances the additional expenditure in corresponding programmes.



Trends: Politicisation of the food landscape

Promotion of German agriculture:

A common symbol for agricultural products that are produced in Germany and processed into the final product. The members of the ZKHL e.V. have agreed on this and initiated the German mark of origin "Good from German Agriculture".

- The industry agreement of the German label of origin 'Gutes aus deutscher Landwirtschaft' defines the product groups for which the label can currently be used
- Meat and meat products from beef/veal, pork and poultry
- Fruit, vegetables, potatoes and mushrooms
- Eggs,
- Milk, yoghurt, quark and possibly other products



Trends: Ethical topics

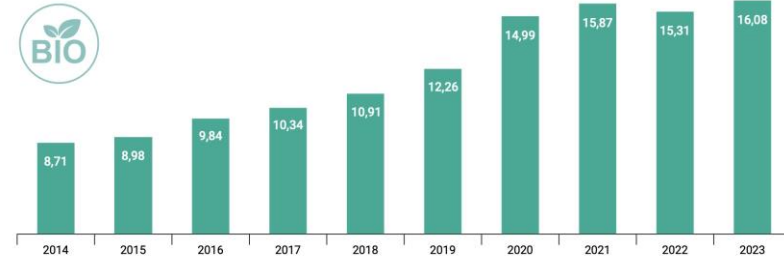
- The demand for more sustainable food (labels: fair, organic, GMO-free, MSC, regional, etc.) has grown steadily
- Despite greater price sensitivity, demand continues and is shifting from specialist stores to supermarkets/discounters' own brands (e.g. organic)

Fair-Trade-Produkte – Umsatz in Deutschland 2010 – 2023
in Millionen Euro



Quelle: Forum Fairer Handel

Bio-Lebensmittel – Umsatz in Deutschland 2014 – 2023
in Milliarden Euro



Quelle: AMI auf Basis von GfK, Nielsen, Klaus Braun; ab 2010 neue Berechnungsgrundlage; BÖLW

Umsatzentwicklung von Lebensmitteln mit „Ohne GenTechnik“-Siegel nach Produktkategorien



Endverbraucher-Ausgaben für Lebensmittel mit „Ohne GenTechnik“-Siegel - eigene Erhebung des verarbeitenden Gewerbes plus pauschale Handelsspanne und Umsatzsteuer

© 2025, Verband Lebensmittel ohne Gentechnik e.V. (VLOG)

Excursus: Anuga 2025

- The BVLH is the founding organisation of Anuga.
- It is the largest and most important food and beverage trade fair in the world: for new markets and target groups, for all trends and topics. Anuga takes place every two years.
- The next Anuga will take place from 04.10. to 08.10.2025 in Cologne.
- **Visit us in our BVLH Lounge at the Retailforum!**

Contact:

Matthias Jäger
jaeger@bvlh.net
www.bvlh.net

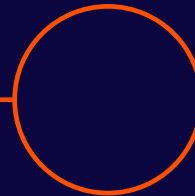




Thaifex Anuga Asia Media Engagement

Consumer Trends 2025 Asia edition

May 2025



Insights partner for innovation



Talk to Innova

The macro context remains challenging for consumers



THE ENVIRONMENT

The health of the planet is the #1 global issue of concern for consumers in Asia. Climate change is being more widely experienced, with impacts for health, food security and the economy. Climate adaptation strategies are more in focus.



HEALTH AND WELLBEING

An aging, growing population and the global mental health crisis are placing healthcare systems under pressure. Health of the population is the #2 global issue of concern for consumers in Asia, while food security and nutrition is #3.



ECONOMIC SITUATION

The economy in Asia Pacific is forecast to grow 4.6% in 2024 and 4.4% in 2025. While inflation has eased, risks to growth remain. Economic uncertainty and job insecurity are the #3 global issue of concern for consumers in Asia.

Health, quality and safety are becoming more important

1 in 2 consumers in Asia say **product quality** has become more important in food and beverage brands (after health and nutrition)

42% say **good quality** is key to perceiving a product as good value for money (#2 behind healthy choice/health benefits)



56% of consumers say **health and nutrition** has become more important in food and beverage brands (#1 factor)

46% say **safety** has become more important in food and beverage brands (#3 factor after product quality)

Source: Innova Lifestyle & Attitudes Survey 2024 (Asia: average of China, India and Indonesia)
Note: Qs: What values or factors have become more important to you when considering food and beverage brands? What other attributes are important to you, other than price itself, to consider a product good value for money?

Enduring lifestyle shifts providing context for consumer trends



Shift toward **Healthier Lives** kick-started by the pandemic



More **Conscious Living** with cost and health benefits



Changing Occasions are impacted by health and more flexible lives



Effects of the **Evolving Nature of Treat and Reward**

Health and wellbeing remains a top priority for 1 in 3 consumers in Asia

1 in 3 consumers in Asia say **mental and emotional wellness** is the primary health goal.

47% of consumers in Asia say they have become **more self-sufficient in the care of their own health** over the past three years by having healthy, nutritious diet; adequate sleep; personal hygiene; etc.



29% choose food or beverage that **boosts health** (contains health-boosting ingredients) to eat healthily

28% **limit or control snacking** and 21% limit or control certain food groups or ingredients to eat healthily

Consumer Trends

Sources: Innova Lifestyle & Attitudes Survey 2024, Innova Health & Nutrition Survey 2024 (Asia: average of China, India and Indonesia).

Note: Qs: Considering your disposable income, where will you prioritize your spend beyond living essentials over the next 12 months? What are your primary health goals? How has the degree to which you are self-sufficient in the care of your own health and wellbeing regime changed in the past three years? When thinking about taking care of yourself, what comes to mind? When it comes to feeling well, what are important product characteristics for your purchase? In which of the following ways do you seek to eat healthily?

Health of the planet is a key driver of more conscious living

30% of consumers in Asia are being **greener and more self-sufficient in their travel** (e.g., walking/cycling), while

1 in 5 consumers are **growing their own produce** (e.g., fruit, veg, herbs)



More than **2 in 5** consumers in Asia are **minimizing food waste** to support the environment or social situation.

More than **1 in 3** consumers in Asia expect companies to act on **nature protection** as well as **raising health and nutrition standards**

Consumer Trends

Source: Innova Lifestyle & Attitudes Survey 2024 (Asia: average of China, India and Indonesia).

Note: Qs: Which of these global issues concern you most? Which of the following actions are you taking to be more self-sufficient and conscious about the way you live? Which actions have you taken to support the environment or social situation in the past 12 months? What would you like most to see brands and companies doing to help the environmental and social causes?

Socializing is becoming more home and nature-focused

The workplace shows a strong growth **(+17%)** as a place for consumers in Asia to socialize, followed by online/social media communities. Coffee shops and restaurants remain important.

Family and **sharing food together** as well as **shared interests, activities** or **experiences** are top sources of social connection for consumers in Asia.



More than **1 in 4** consumers in Asia will prioritize spend on **social gatherings with family and friends**

+26% net shift in Asia toward **consumers eating at home more** and away from out-of-home eating

Consumer Trends

Sources: Innova Lifestyle & Attitudes Survey 2024 (Asia: average of China, India and Indonesia)

Note: Qs: Which of the following places or spaces have become more or less important to you as a place to socialize in the past 12 months? When you are socializing, what are your primary sources of connection? Considering your disposable income, where will you prioritize your spend beyond living essentials over the next 12 months? Have your eating occasions changed in any of the following ways in the past 12 months?

Everyday moments are the #1 way to treat and reward

More than **2 in 5** consumers in Asia **shared with family, relaxing and healthy/good for me** as attributes of a good experiential moment of happiness



Health and wellness are key drivers of choice in everyday treats for consumers in Asia, with **healthy and nutrient-rich** in the top 2 attributes.

More than **1 in 3** consumers in Asia choose **fresh ingredients** and **nutritional benefits** as the top drivers of enjoyment in food.

Consumer Trends

Sources: Innova Lifestyle & Attitudes Survey 2024 (Asia: average of China, India and Indonesia).

Note: Qs: How do you prefer to treat and reward yourself? What are the most important attributes that make a good experiential moment of happiness to you? What are the most important attributes that make a good everyday treat to you? What are the most important drivers of enjoyment and pleasure in food for you?

Innova's consumer trends 2025 – Asia edition

Consumer Trends



Savvy and Self-Sufficient



Digitally empowered consumers are increasingly willing and able to **self-serve and self-support** on aspects such as health, finance, fitness and cooking at home.



Quality and Safety



While **trust in large companies and brands** is **growing** in Asia, product **quality, health and safety** remain paramount, with honesty and transparency a key theme.



Authentic Connection



There is greater **appreciation of nature**, close connections and **real experiences**. Consumers are seeking the **genuine, tangible and secure**.



Positive Best



With **feeling well** the key driver for pursuing a healthier lifestyle, consumers are adopting strategies to help them to look and feel their **mental and emotional best**.



Transformational Moments



Consumers are seeking experiential moments of **delight** and **entertainment** that deliver a sense of **connection, release, adventure and wonder**.



Opportunities to Innovate

TREND #1 Ingredients and Beyond



In Asia, growing **health consciousness** is driving demand for products that go **beyond ingredients** to **deliver high quality**, **nutrition**, and clear **health benefits**. Emphasizing **ingredient quality**, **functionality**, and **transparency** can help brands stand out and build **trust**.

TREND #2 Precision Wellness



Innovations can circle around **targeted nutrition** based on **age**, **gender**, **lifestyle**, **weight management** etc. knowing the consumers' specific needs. **Targeted nutrition** with specific **functional ingredients** addressing **diversified consumer needs** can drive future innovations.

TREND #3 Wildly Inventive



Innovating launches with **unimaginable**, **adventurous & peculiar flavor combinations** can open doors to innovations. Striking the balance of delivering goods with **classic flavors** with a **modern twist** can drive consumer attention in the future.

TREND #4 Flourish from Within



Gut health is a priority for all generations. Products can target specific gut health issues for different age groups. **Functional ingredients** like **fiber**, **probiotics**, **prebiotics**, and **vitamin D** provide gut benefits. Innovation in categories like **energy bars & fermented drinks** may shape the future.

TREND #5 Rethinking Plants



As consumer interest shifts from processed alternatives to **natural**, **whole-food plant sources**, brands have an opportunity to innovate with a **cleaner**, **simpler approach**. Growth lies in **clean-label**, **minimally processed** plant products that offer **transparency** and **authentic nutrition**.

Opportunities to Innovate

TREND #6 Climate Adaption



As **climate change** impacts **pricing** and **product choices**, brands can innovate with **sustainable strategies** that align with consumer values. Offering **affordable**, **climate-resilient** products can drive **consumer trust** and **loyalty**.

TREND #7 Taste the Glow



With the cosmetic industry thriving, there's an opportunity to integrate **beauty-enhancing benefits** into food and beverages. Nearly 1 in 4 consumers in Asia seek products that improve **physical appearance**, creating demand for **beauty-focused innovations** in categories like **bottled water, juice, and fermented foods**.

TREND #8 Tradition Reinvented



Bringing back launches with **local ingredients, traditional** and **well-known flavors** and recipes can create winning opportunities in finding more **shelf space**. **Old classics** with application of **modern technology & improvisation in product qualities** can win hearts of the consumers.

TREND #9 Mindful Choices



Food for mood is expanding in the F&B segment. Catering the needs in **multi dimensional aspects of mental health** will attract consumers. Expanding the application of various **traditional & modern functional ingredients** and creating **indulgent experiences** can drive consumers.



UNLOCK OPPORTUNITIES FOR GROWTH

TALK TO INNOVA



Talk to Innova

Meet us on

