# **Country report: Italy**

(working draft 16.8.2019)

## **1. Introduction**

The following pages illustrate the main characteristics of the Italian food distribution sector, highlighting the most significant changes that have occurred over the past 20 years. Using scientific and grey literature, as well as secondary data analysis, the aim is to depict the status quo of the Italian food economy, with particular attention to the appearance of digital platforms for the distribution of food in the Italian context.

First, the report outlines and classifies the key players in the distribution sector, distinguishing the role of the mass retail channel (GDO) and traditional shops (CDS) with that of the alternative food networks.

Second, the focus shifts to the consumer side, in order to throw light on the most recent evolution in food consumption patterns: crucially, this section makes use of secondary data analysis to put emphasis on the social stratification of purchasing and consumption preferences.

Third, it concentrates on digital food platforms illustrating some key examples that could be of use for feeding next WPs.

## **2. The food distribution sector: the supply side**

The characteristics of the Italian food distribution sector have been influenced by several factors among which the presence of a restrictive regulation that before 1998 appears to have hindered the growth and establishment of the mass-retail channel (Pellegrini & Zanderighi, 2013). The Bersani reform passed in 1998 which was further cemented by the “Salva Italia” and “Cresci Italia” decrees issued by the Monti Government in 2012, by introducing liberal elements in the retail sector, appears to have paved the way to the consolidation of several key players of the ***Grande Distribuzione Organizzata* (GDO)**.

This delay, may explain why the Italian food distribution sector still presents a rather plural context made up by different retail channel. Despite the GDO nowadays controls the majority of the share, the market is in fact still strongly characterised by the presence of small, local, family-owned businesses (the so-called ***Commercio al dettaglio in sede fissa* -CDS**) and by a lower degree of market concentration compared to other EU countries (Pellegrini & Zanderighi, 2013). CDS are the historical opponents of corporate actors, although as underlined by Scarpelini (2017) they supply food products in a very similar fashion. Moreover, this opposition does not account for the entire food distribution sector, as over the last 15 years, **Alternative Food Networks (AFNs)** started to appear and to propose an unconventional food supply to more conscious and ethical consumers (Ventura et al., 2016; Marino, 2017).

Following the most recent literature on the changes occurred on the supply side in Italy, This first section, p i) provides a short description of the GDO, the CDS, and the AFN; ii) compares and contrasts the GDO and the CDS trends, throwing light on the concentrations vs dispersion opposition in the *conventional* food distribution sector; iii) presents the main typologies of AFN and their vision.

### *2.1 Definitions and main characteristics*

1. **GDO:** The acronym GDO stands for Grande Distribuzione Organizzata, and gathers together the GD and the DO, for a total food market share of 73.5% (Federdistribuzione, 2016) and a turnover of 58.1 billions (Area Studi Mediobanca, 2017). The former is characterised by the centralisation of the property in one company or group of companies (i.e. Esselunga, Auchan, Carrefour, Finiper, Gruppo Pam, Bennet, Lidl Italia, Eurospin). The DO, also known as Distribuzione Associata (Associate Distribution), presents a higher degree of differentiation as the property is diffuse and regulated by voluntary agreements of the traders (e.g. Coop, Conad, Selex, Despar), although vertical integration for the logistics, marketing, and commercial policies are common (Distribuzione Moderna, 2018).

Figure 1. Market share of first 10 GDO groups. Federdistribuzione (2016).

Both GD and DO are characterised by the organisation of the distribution through different stores, which can be distinguished depending on the store dimension: minimarket and superette (100-400 squared meters, now opening in many historical city centres); supermarkets (small: 400-800 sqm; big: 800-1500 sqm); superstore (1500-2500 sqm); iperstore (2500-4000 sqm). On top of this distinction, two other food distribution channels can be mentioned: Soft/Hard Discounts (e.g. Lidl, Eurospin, Prix), based on the proposal of unbranded, cheap products; and *Grande Distribuzione Specializzata* (Ecornatura sì, Sapore di Mare), specialised in the supply of specific food products such as organic food or frozen food).

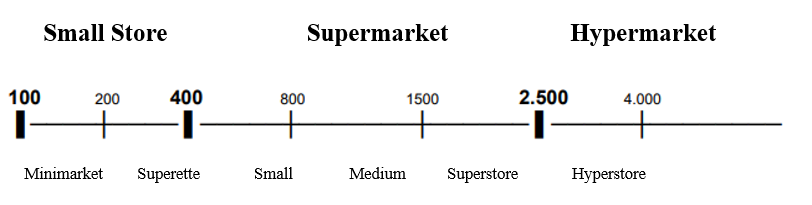


Figure 2. Type of food store by squared meters.

The core characteristic of the GDO is the creation, since the 80s, of the *Supecentrali di acquisto* (Supercentrals). Supercentrals are oligopolistic alliances between competitor companies (Italian or European) for negotiating the general purchasing conditions of most products that end up on the shelves, and aiming to increase the bargaining power with suppliers (Ciconte & Liberti, 2017). Although some companies, by virtue of their dimensions, negotiate the products supply on their own (e.g. Esselunga, Carrefour), most alliance are constituted by several GDO companies. In 2012, there were 7 Supercentrals operating within the Italian territory, involving 21 chains and accounting for 78 percent of total sales in the retail industry. The first three groups represented 50 percent of the Italian retail market (Fraquelli & Menozzi, 2014). Critics of the supercentrals highlight how this concentration is problematic at least for two main reasons: on the one hand, the progressive homogenisation of the distributors, purchasing conditions and promotional budget restricts the competitive dynamics with a possible effect on food prices. On the other hand, the collective purchasing through supercentrals tend to strangle agricultural food producers, who are forced to abide by the requests of the GDO (e.g. verbal or obscure contracts, unilateral change to the contracts) for not incurring in delisting o retaliation practices (see the report by the antitrust authority: AGCM, 2013).

1. **CDS:** The market share of traditional shops (16.3%) and street sellers (10.2%) is higher in Italy than in other countries. This is indeed confirmed by the low concentration of the sector: the first 3 GDO companies in Italy share around 36,1% of the market, compared to 61% in the UK, 61% in Germany 54% in Spain and 53% in France. (Pellegrini & Zanderighi, 2013). With the term CDS we identify all those traditional food shops that are not associated with a GDO brand, although they might be selling in stores between 100 to 800 squared meters. Differently from the GDO, they personally take care of the store supply, at most relying on consortiums or small franchises. The progressive decrease of small, family-owned, businesses did not undermine their existence and today they are still diffuse. Furthermore, many CDS demonstrated a high resilience, and converted from single-product shops to de-specialised stores: for instance, bakers started to sell sandwiches, and butchers to cook meat (Pellegrini and Zanderighi, 2011). In addition, CDS benefited from the opening of many ethnic food shops by immigrants resembling the characteristics of the Italian CDS. This peculiar characteristic of the Italian food distribution system mirrors the historical tradition of the Italian petit bourgeoisie - small enterprises and autonomous workers constitute 21.5% of the total workforce, well above the European average (Muller et al., 2017). The “Borgeoisie Proletariat” (Maida, 2009) threatened by the dawn of the supermarket in the 60s and by the consolidation of the GDO after the 1998, seems thus able to adapt the economic evolution of the sector.
2. **AFN:** The emergence of a new consumer awareness on the negative impact of global food chains in terms of nutritional wellbeing and environmental sustainability has been accompanied by the rise and diffusion of short food chains and local food systems (Graziano & Forno, 2012; Forno & Graziano, 2014). Despite research on the sustainability performance has not yet reached consensus from the scientific community (Brunori et al., 2016), business, citizens and policy initiatives have intertwined and generated a new liminal food distribution system alternative to both the GDO and the CDSF. As we will show, AFN in Italy take different forms, but they all share common characteristics (Jarosz, 2008; Blasi et al. 2015). First, an element of sense-making against the commodification of food, and therefore against GDO and CDSF (*ethicality*). Second, the short, and sometimes absent, distance between producer and consumer (*proximity*). Third, the involvement of small farms that favour ethical and responsible forms of food production (*responsibility*). Fourth, the gathering of producers and/or consumers around (tangible and intangible) purchasing venues (*participation*). Fifth, a vision of grocery shopping as a political action involving at once social, economic an environmental issues (political *awareness*).

### *2.2 The conventional food distribution sector: key figures of the GDO and CDS*

The food distribution sector has profoundly changed after the deregulation of 1998 and 2012. As suggested above, the liberalisation of the sector mainly benefited the GDO, although the Italian delay, compared to other European countries, slowed down the concentration of the sector. Some figures may help quantify this trend. First, Figure 3 and 4 clearly show the contraction of the CDS market. From 2000 to 2016, traditional food shops lost more than 10 percentage points of market share. During the same period, all GDO stores but minimarkets and superettes gained market share. Hypermarkets moved from 7.6% to 10.2%, supermarkets and superstores from 37.3% to 42.8%, Discounts from 6.2% to 12.8%.

Figure 3. Food distribution market share evolution. Federdistribuzione (2016).

When we cumulate these percentages and we just differentiate between GDO (Hypermarkets, Supermarkets and Superettes, Discounts) vs CDS (Traditional shops + Street sellers) the picture becomes even more clear: the former took a 10 percentage points share from the latter, that moved from 36.9% to 26.5%. This reduction is confirmed also when looking at the CDS by food typology: the total number of fruit and vegetables shops (-10%), butchers (-26.9%), bakers (-13.1%) and other specialised food sellers (-49%) decreased over time. Apart from the increases in Fisheries (+11.2%) and Drink shops (+27.5%), the whole CDS specialised sector registered a 14.2% decrease in the number of specialised food shops. However, since the total share still sums to a quarter of the market share it is reasonable to state that this contraction is not necessarily leading to a complete demise.

Figure 4. Food distribution market share evolution. GDO vs CDS. Federdistribuzione (2016).

Figure 5. Number of CDS by food typology: 2000 vs 2017. Own analyses based on data furnished by the Ministry of Economic Development.

### *2.3 Typologies of Alternative Food Networks*

The challenge posed to sustainability by the global food system has spurred the rise of alternative practices for food provisioning all over the globe. Far from being a uniform scenario, the alternative provision of food developed through a variety of channels, bonded by the rediscovery of and reconnection with food production. Especially in periurban areas, urban-rural proximity provides farmers with the opportunity and the incentives to develop alternative food chains and direct sales, and consumers with the possibility to get easily in contact with goods they recognise as local, traditional, and natural (Marino, 2018). In the Italian context, we can distinguish between two main B2C channels aimed at reconnecting producers and consumers: direct sales and short food supply chains. These channels intertwine and are simultaneously used by producers to increase their market reach.

**Direct sales** refer to the trade of agricultural goods from the producer to the consumer. Direct sales are regulated by local councils, following the parameters contained in the 2006 Ministerial decree (Rete Rurale Nazionale, 2017). This model allows producers to cut out all intermediaries’ costs from the transaction. In Italy, direct sales from agricultural producers to consumers involve around 270.000 farms (17%) (Marino, 2018), and operates through the following channels (Rete Rurale Nazionale, 2017):

1. Company outlet: the producer opens a point-of-sale in the production site
2. Local markets: the producer sells his products in the local market of nearby towns/cities after a public call for tender
3. Farmer’s markets: differently from local markets, only farmers registered to the Italian chamber of commerce can participate to the sales.

**Short food supply chains (SFSC)** are instead food-provisioning organisations formed by a number of users that promote cooperation, local economic development and networking between local farms, tourist industry and consumers. This model is based on the first-hand knowledge of the producer and on fair trade criteria in the distribution of the surplus. Most commonly known SFSC are:

1. Solidarity Purchasing Groups (known in Italy as GAS): GAS consist on the collective purchasing of foods (and other nondurables) by a small group of individuals (generally 20 to 40) (Grasseni, 2013). Despite the organisational structure can greatly vary, all GAS select local producers that are in line with sustainability and fair trade principles.
2. Box scheme: home delivery services of local food products, generally ordered through online services.
3. Community Supported Agriculture (CSA): CSA comprises a heterogeneous number of activities with different objectives, that all have in common the participation of consumers in the production process by acquiring, ahead of time, a share of the farmer production (e.g. acquiring a share of cheese before the actual production so to sustain local breeders). CSA thus share the entrepreneurial risk while supporting the local production of foods.

## **3. Consumer behaviour and culture: the demand-side**

In Italy, according to the Coop report 2017, food consumption patterns have radically changed over the last decades. Regardless of the slight increase in the expenditure for food that characterises the last few years of economic upturn, Italian families have considerably modified the composition of the food shopping cart. Although marked differences exist according to macro-regional area, these new patterns of food consumption can be summed up along three main dimensions (see also Belloni, 2014):

1. *Modification* of main food groups: compared to the 60s, fruit consumption has increased, white meats have partially replaced red meats, carbohydrates, (especially in the form of pasta and bread) are decreasing.
2. *Dilatation* of food preferences: the report confirms the entrance of new food typologies and food groups niches in the diet of many Italians. From 2010 to 2017 the purchasing of ethnic, ready-made, luxury (i.e. mushrooms, fish fillets, DOC wines) and therapeutic (e.g. superfood and sirt) food has increased, although the specific food products are subjected to volatile changes and can soon become démodé.
3. *Renovation* of food values and gastronomic horizons: food now encapsulates different, sometimes contrasting, set of values. It becomes a means to express political awareness, status and/or group identity. This scattered foodscape combines or contrasts various consumption dimensions, such as:
4. The renowned attention to and increasing preference for local and organic food products (40% and 70% of consumers prefer to acquire organic and local options respectively).
5. The attentive use of particular edibles as medical substitutes.
6. The consolidation of specific dietary tribes (vegan 1% to 3%, vegetarian 4% to 7%) and the emergence of specific sub-groups (raw foodies, fruitarians, local-vories, gluten free etc.).
7. The “fashionisation” of food, namely the aesthetic digitalisation of meals on most commonly known social networks (1/4 Italians take pictures of food when eating out).

Although these trends may generally characterise the Italian foodscape, it is crucial to keep in mind that socioeconomic gradients shape consumption patterns. Food is a highly stratified social realm, and cannot be fully understood without highlighting how different milieus are associated to several facets of food consumption. Empirical inquiries pointed out that cultural consumption in general, and food consumption in particular are strictly tied to families’ resources. Sociologists have scrutinised food consumption from several angles, from purchasing to ingesting, passing through alternative provisions, eating out, and feeding. This exceptional bulk of research produced substantive evidence which can be summed up in four core findings.

First, food is an important means through which familial, ethnic, and class identities are expressed and intertwined, and inequalities reproduced (Warde, 1997; O’Connell, 2010; Wills et al., 2011).

Second and strictly tied to this, food is linked to the social stratification of health status, as nutrition inequalities give rise to health-related conditions: for instance, in high-income countries obesity is more prevalent among lower social classes (Gallus et al., 2015; Barriuso et al., 2015). In fact, diet quality is related to families’ economic and ecological opportunities, which in turn affect the symbolic value they attach to food and dietary concerns (Fielding-Singh, 2017).

Third, the (debated, see Lizardo and Skiles, 2015) contemporary shift of upper social groups towards more omnivorous and apparently open-minded patterns of cultural consumption assumes in the case of food a variety of traits. Authenticity, simplicity, exoticism and sustainability are the keywords describing the characteristics of eating and feeding among dominants classes (Johnston and Baumann, 2010; Cairns, Johnston and MacKendrick, 2013). Thus, the ostensible horizontality of this eclectic and cosmopolitan taste hides the ultimate resorts of distinction (Warde et al., 2007; Paddock, 2016) which become evident in grocery store hierarchies and classed depiction of discount grocers (Cairns and Johnston, 2015). The process of symbolic di-vision in the social space is then relocated in the metropolitan space as neighbourhood privilege, through environmental and food gentrification processes (Zukin, 2008; Anguelovski, 2015).

Fourth, despite in Western societies female participation in the labour market has constantly increased over the last 50 years, food management in the domestic environment remains a gendered task (DeVault, 1994; Valentine, 1999). This is particularly the case in Italy, a country predominantly characterized by the breadwinner model and unbalanced household arrangements (Esping-Andersen, 2012).

Keeping this in mind, here below we briefly present the results of a descriptive analysis conducted on two surveys of the Italian Statistical Institute (ISTAT). These two surveys serve as an example to reflect on the stratification of i) store access and ii) sustainable consumption behaviours.

### *3.1 Store Access*

First, using the Survey on Household Consumption (SHC) 2012, we can get a hint on the stratification of store access. The analytical sample includes all families where the referral person is older than 25 and consists of 13,835 units. In the survey, the referral person is asked to state where does the family usually buy bread, pasta, meat, fish, fruit and vegetables. Possible answers to each edible are: hard discount, supermarket, hypermarket, traditional shop and street market. Table x below illustrates some descriptive statistics for each edible considered, which all in all confirm on the consumer side what already seen on the distribution side. Three considerations are in order: first, traditional shops are still a relevant force at play, with percentages ranging from 9% for pasta (usually acquired in supermarkets), to 45% for bread. Second, street markets are almost exclusively used to purchase fruit and vegetables. Third, supermarkets are the stores most often attended to purchase commonly consumed groceries.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Bread** | **Pasta** | **Meat** | **Fish** | **Fruit and Vegetables** |
| *Hard-Discount* | 7.43 | 11.88 | 8.15 | 7.10 | 7.99 |
| *Hypermaket* | 9.39 | 15.84 | 12.74 | 13.79 | 11.36 |
| *Supermaket* | 37.08 | 62.24 | 46.23 | 44.66 | 42.32 |
| *Traditional shop* | 45.16 | 9.74 | 31.94 | 25.36 | 22.62 |
| *Street market* | 0.94 | 0.30 | 0.94 | 9.09 | 15.71 |
| Total | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 |

Table 1. Percentage of families purchasing bread, pasta, meat, fish, and fruit and vegetables in different store types.

In order to unravel how social stratification shape store access, we recoded the 5 items so as to create a dummy that indicates whether the family acquires at least one food item in the hard discount (16.09%) or not (83.91%). We then applied a logistic regression. The model controls for the educational level of the referral person in the family (tertiary, upper secondary, and lower secondary or less) and the deciles of total household expenditure minus nondurables as a proxy to household total financial resources. Additional control variables include the family type (single, couple with/without children, lone parent), professional condition (worker, unemployed, inactive or retired) number of people in the household, age (25-34; 35-49; 50-64), sex of the respondent, macro-region of residence (north, centre, south and islands).

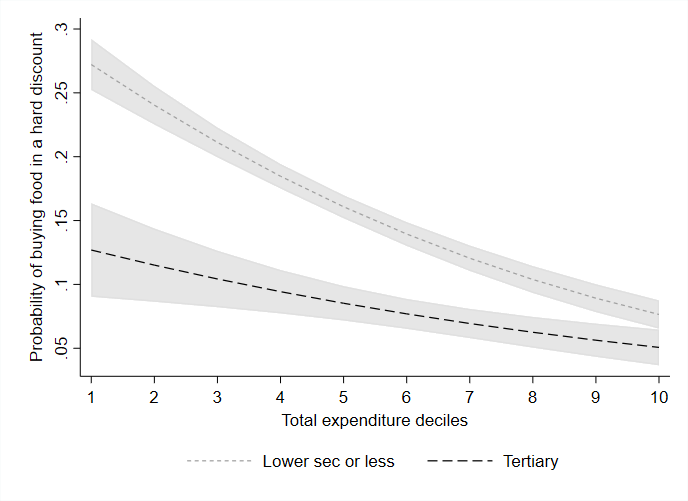


Figure 6. Marginal effects on the probability of purchasing at least one food item in the hard discount by total expenditure deciles and educational level.

Figure 2 illustrates the results of the interaction between educational level and the income proxy based on the Italian samples. The panel shows educational level differences in the probability to buy food in a hard discount by deciles of expenditures. Although the propensity diminishes with higher levels of economic resources for both educational levels, there is a noticeable gap between lower secondary or less and tertiary educated individuals, which narrows down with increasing levels of household financial resources. Whilst the former group reduces the likelihood of 20.14 percentage points, passing from 28.0% to 7.86%, the latter goes from 12.47% to 4.68%, thus lowering the propensity of 7.79 percentage points. In other words, cultural resources characterizes families’ store choice at the bottom of the income distribution, but its effect becomes negligible for well-off families.

### *3.2 Food Consumption*

Second, using the Multipurpose Survey of Daily Life (MSD) of 2014, it is possible to get an insight on some consumption trends already mentioned above. We selected the Italian adult population aged 25+ and we consider three different behaviours associated to sustainability. The sample consists of 25.126 individuals. Table x shows the frequencies for the purchasing of organic and local products, and for reading the labels of food products. As it is possible to see, more than 40% of the selected population buys organic products sometimes or regularly; more than 50% purchase local products sometimes or regularly; almost 70% pays attention to food products labels when buying groceries sometimes or regularly. In general, these figures suggest that some consumption patterns associated to sustainability are common among the Italian adult population.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Purchasing organic products** | **Purchasing local products** | **Read labels of food products** |
| *Regularly* | 9.40 | 21.22 | 38.28 |
| *Sometimes* | 32.74 | 38.40 | 29.18 |
| *Rarely* | 23.74 | 17.93 | 14.41 |
| *Never* | 34.13 | 22.45 | 18.13 |
| Total | 100.00 | 100.00 | 100.00 |

Table 2. Percentage of people aged 25+ that purchase organic products, local products, and read labels.

Additional analysis, however, indicate that sustainability is far from being a uniform pattern, as it does not cut across all socioeconomic groups. We recoded the three variables into dummies (0 = Rarely/Never; 1 = regularly/sometimes), and we also considered a fourth dependent variable indicating whether the respondent is normo-weight (0) vs overweight or obese (1). For each dependent variable, we applied a logistic regression. All models control for age, educational level (degree, upper secondary, lower secondary, primary), professional position (bourgeoisie, white collars, petty-bourgeoisie, working class), gender, family type (single, couple with/without children, single parent), marital status (unmarried, married/living together, separated/divorced, widow), number of people in the household.

Figure 6 shows the linear prediction for the educational level, which is among the best predictors of sustainable consumption patterns. As it is possible to see, educational level has a strong monotonic effect on the probability of engaging in the three consumption patterns under observation, as well as on the probability of being overweight or obese. The difference between the highest and the lowest educational level considered is 22.6 percentage points (pp) in the case of organic products and 11.8 pp in the case of local products. Similarly, individuals with a degree are 20.5 pp more likely to read labels than those with a primary education, who are also 15.2 pp more likely to be overweight/obese.

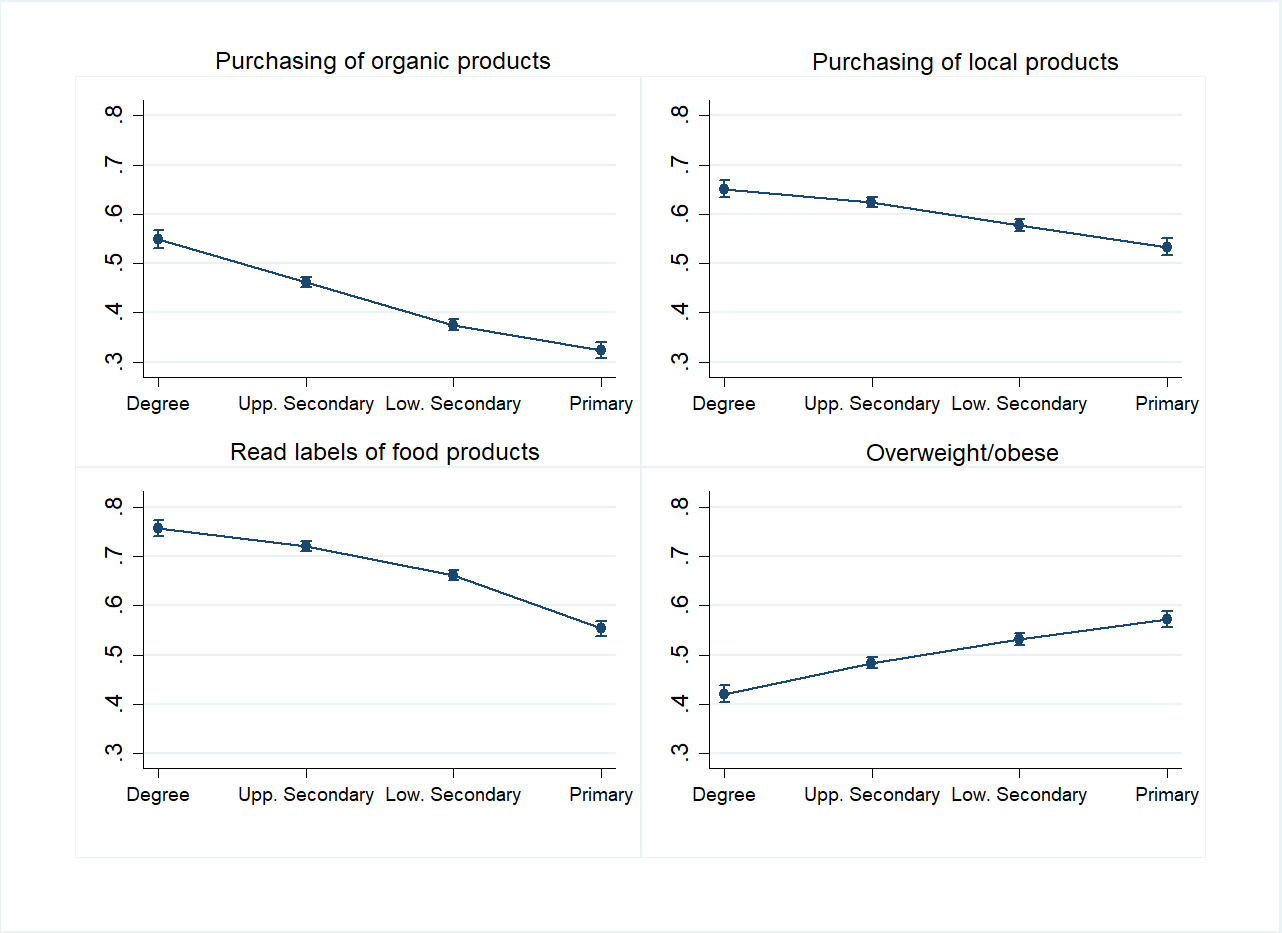


Figure 7. Marginal effect on the probability of purchasing organic and local products, reading labels of food products, and being overweight or obese by educational level of the respondent.

## **ICTs, Online shopping and Digital food platforms**

Compared to continental and northern European countries, ICTs in Italy lag behind. Whether from a business or a consumer perspective, e-commerce and internet use statistics indicate the digital divide is still a relevant force at play, especially in rural and less economically active areas of the country (Rete Rurale Nazionale, 2016). Small enterprises, which are a peculiar characteristic of the Italian economic system, present low levels of digitalisation of the sector (Istat, 2017) According to the Eurobarometer (2016) report, in 2014 less than half of Italian households had internet access (41%), compared to an EU average of 67%. Similarly, internet is less used to sell goods or services (8%) compared to the EU average (23%). Although among younger cohorts and in urban areas this divide tends to disappear, the overall delay can partly explain why food e-commerce is still in its early days: in 2016 only 8% of Italians ordered groceries online at least once a year, and the share on the total food and groceries expenditure is just the 0.35%. Nevertheless, the sector is rapidly growing (30% increase between 2015 and 2016), as the number of companies using internet as the unique (33%) or complementary (67%) trade channel confirms. The total e-food market in 2016 amounted to 575 million euros, and 40% is the share of online grocery shopping alone (Osservatori, 2016).

Although business models rapidly change, the e-food commerce seems now characterised by players that partially overlap with the traditional food distribution sector. Table 3 below proposes an attempted taxonomy and a description of the most common supplier available in the online market that can be compared with the codebook. We distinguish between 4 main macro-food distributors, that partially overlap with the key players identified in section 1. Each category can contain different subcategories, and can be further distinguished depending on the type of economic objective (whether a revenue is searched by the owner or not) and on the type of products sold (whether the platforms sells brands or shows the producers).

1. **Mass retail channel** (GDO and GDS): the main companies of the mass retail channels now allow the purchasing of their products online. Depending on the business model, the mass retail chain may organise home delivery, click and collect, and drive through.
2. **Traditional shops**: despite the difficulties encountered by small firms and autonomous workers in the digitalisation process, permit the online purchasing of their products on their websites.
3. **Online-only**: thanks to the new opportunities opened by internet, some companies started offering food products solely through digital platforms. The online only sector is very heterogeneous, and comprises huge IT companies such as Amazon, small food suppliers selling ethnic or niche products, or traders specialised in local/traditional food products.
4. **AFN**: the new ICT tools have transformed also the scenario of AFN networks, as they shortened the distance and eased the interaction between producers and consumers. Producers have thus been able to increase their autonomy from mass retail channels and new BTC and BTE (business to ethics) groups exploited digital technologies to increase the impact of their sustainability agenda.

To ease the comprehension of this taxonomy, we present for each subcategory a digital platform that can serve as a case study.

* **GDS:** [Natura Sì](https://www.naturasi.it/) is an organic food distributor available in all Italian regions that mainly operate through supermarkets. Since a few years, it is possible organises the home delivery of all the organic food products through the online section of the website.

Link: https://www.naturasi.it/

* **GDO:** [Esselunga](https://www.esselungaacasa.it/ecommerce/nav/welcome/index.html) is one of the most important mass retail store of northern Italy. Through the website it is possible to purchase all the products available in the stores. Home delivery and click and collect services are both available to customers.

Link: https://www.esselungaacasa.it/ecommerce/nav/welcome/index.html

* **CDS:** [Lunelli](http://www.lunelli.it/) is a small, family-owned, traditional shop in the city of Trento that sells regional food products and drinks. The online shops permits the purchasing of all the dry foods and preserves, but not fresh products.

Link: http://www.lunelli.it/

* **Online-only mono-product:** [CiboUSA](https://www.cibousa.com/) is an online store specialised in the sale of American food products. The company ships only dry food products (chips, drinks, cereals, chocolate etc.) all over Italy. *Notice*: the increasing number of ethnic food shopping websites could actually constitute a sub-category per se, different from the online-only shops specialised in the re-selling of typical Italian products.

Link: https://www.cibousa.com

* **Online-only multi-product:** [Amazon pantry](https://www.amazon.it/Amazon-Pantry/b?node=10547410031) is the online food store accessible to Amazon Prime users. The online company does not currently sell fresh food product.

Link: https://www.amazon.it/Amazon-Pantry/b?node=10547410031

* **AFN direct sales:** [Biocesta del gusto](http://www.biocestadelgusto.it/)is the direct sale service organised by the organic family-owned farm based in Trentino “Maso del Gusto”. The farm has 4 fruit and vegetables shops in the city of Trento. Since a few years, customers can order through the website a fruit and vegetable box, and collect it in one of the 4 shops.

Link http://www.biocestadelgusto.it/

* **AFN Gas:** [Alveare che dice sì](https://alvearechedicesi.it/it) is a solidarity economy project based on Italy, France, Spain, UK, Germany, Netherland and Denmark. The website facilitates the build-up of small local trade points where a person collects food products from the nearby producers (less than 35km), and sell them to a group of customers. The producer keeps 80% of the revenue, 10% goes to the responsible and 10% to the company.

Link: https://alvearechedicesi.it/it

* **AFN Networking:** [Cortilia](https://www.cortilia.it/) is an online shop that home delivers fresh and artisanal food products from a selected group of producers. In order to be part of the networks, the farmers and the artisans involved must respect some sustainability criteria.

Link: https://www.cortilia.it/

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ***Main digital platform types*** | ***Subcategories*** | ***Example*** |  | ***Sells Producers or brands*** | ***Profit/Non profit*** | ***Other examples*** |
| **Mass retail channel (GDO/GDS)** | *Specialised* | [Natura Sì](https://www.naturasi.it/) |  | Brands | Profit | [Eataly Today](https://today.eataly.net/?utm_source=eataly&utm_medium=website&utm_campaign=label) |
| *Organised* | [Esselunga](https://www.esselungaacasa.it/ecommerce/nav/welcome/index.html) |  | Brands | Profit | [Coop](https://www.cooponline.it/) |
| **Traditional Shops (CDS)** | *(Mainly by food type)* | [Lunelli](http://www.lunelli.it/) |  | Brands and/or producers | Profit | [Salumeria Giovanni Bacchi](https://www.salumeriabacchi.it/) |
| **Online-only** | *Mono-product* | [CiboUSA](https://www.cibousa.com/) |  | Brands | Profit | [The Oriental Mart](https://www.orientalmart.co.uk/) |
| *Multi-products* | [Amazon pantry](https://www.amazon.it/Amazon-Pantry/b?node=10547410031) |  | Brands and/or producers | Profit | [Primo Taglio](http://www.primotaglio.it/) |
| **Alternative food networks** | *Direct sales/ SFSC* | [Biocesta del gusto](http://www.biocestadelgusto.it/) |  | Producers | Profit & Non profit | [BioExpress](http://www.bioexpress.it/) |
| *GAS (BTE)* | [Alveare che dice sì](https://alvearechedicesi.it/it) |  | Producers | Non profit | [Peso Netto](https://www.pesonetto.it/) |
| *Networking* | [Cortilia](https://www.cortilia.it/) |  | Producers | Profit | [Egnam](http://www.egnam.it/) |

Table 3. Types of digital platforms in the food distribution sector.

## 5. Open questions

In the previous pages we have proposed an initial reflection of what appear to u some relevant aspects of the Italian food sector. In light of next WPs, we think that the following issues should be considered.

1. The many different typologies of (digital) food platforms available in Italy probably indicate the necessity to agree on a more stringent set of criteria for understanding which are the provision modes that convincingly promote a sustainable diet. For instance, the attention that many consumers are now giving to ethicality, localness and fair trade on food (McEachern & Mcclean, 2002; Almli et al., 2011; Balogh et al., 2016), is pushing many companies in the mass retail channel to include products vaguely responding to these values in their shelves (e.g. Coop’s ethical or local products’ lines, such as Solidal and Fior Fiore etc.). However, considering the concerns raised by the antitrust authority on the GDO model, this innovation does not automatically guarantee a sustainable food supply at all levels. As some authors have pointed out, these products could also be used to greenwash the corporate profile and to keep ‘ethical’ customers within the stores. On the other hand, despite the pivotal role that sustainability has on the supply chain of all AFN *at all levels*, some perverse downsides, such as parochialism, localism, nostalgic essentialism, should be always kept in mind (Goodman, 2004; Grasseni, 2013).
2. Differences in the diffusion of digital technologies and internet access could help unveil why the (digital) food distribution sector and consumers’ use of these services greatly vary across countries. At the same time, this should not obscure how cultural differences affect gastronomic horizons, eating practices and the organisation of grocery shopping. What are the macro-factors that help explain cross-country variations in the development of e-food? Does the digital divide partly explain differences in the rate of e-food shopping? Does access to ICTs guarantee the development of e-food commerce?
3. The role that the petty bourgeoisie and traditional food shops have in Italy is probably unique among the European countries considered in the project. The digitalisation of this share of the food distribution sector probably presents idiosyncratic characteristics which partly affect figures on Italian e-food in general. Although this issue does not probably align with the project’s objectives, it constitutes a relevant force in the Italian scenario that should not be neglected. In this regard, the possible connections between AFNs and CDS could be explored. What are the main differences between AFNs and CDS? What are the “frictions” and “alliances” between the players of these two forms of food distributions? Is there a clear-cut difference between the two? How does an AFNs translate into a CDS and viceversa? Does the digitalisation of the sector affecting this relation?
4. The way households’ resources affect consumption possibilities and lifestyles should not be neglected. Physical and digital food platforms innovation may not only serve to promote and enable sustainable food consumption practices, but also hide conduits for distinction and boundary making processes that reinforce classed based practices. Along the lines, economic and cultural factors that facilitate or hindrance the take up of sustainable platforms/diet should be considered: how much does it cost to switch from a physical to a digital platform? What are the hidden costs (e.g. internet access, digital proficiency, adequate technological tools, etc.) of online grocery shopping? What are the symbolic values attached to traditional forms of grocery shopping?

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