Ca' Foscari University of Venice

Master's Degree Programme

in Global development and Entrepreneurship

Final Thesis

Current use and growth potential of BtoB agri-food purchasing platforms

Identification of today's critical issues and suitable tools to meet the needs of customers to increase the use of BtoB agri-food online shopping apps

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Matriculation Number 851028

Academic Year

2023/2024

ABSTRACT

With the increasingly progressive development of the use of digital platforms for the search of products and tools of common use and otherwise and the subsequent purchase without having to move to physical locations to view and pick up the product directly as well as the thrust of this style of purchasing that is influencing as well as evolving the very lifestyle of people and society as a whole, it is evident that, even companies, within their business models, are focusing on the development and promotion of such digital tools to facilitate on the one hand and increase on the other hand the service of communication, selection and purchase of their product and service offerings.

Digital platforms play an important role in terms of information sharing and direct purchase possibilities by avoiding logistical movements of consumers and possible intermediaries and reducing those of promoters within physical points of sale. The Covid pandemic has exponentially forced the use of such tools to the extent of "educating" people about online consultation and information as well as becoming familiar with digital platforms to make their purchases.

In this essay our focus is to understand the degree of use by agribusiness customers (stores and restaurants) of digital tools to make their purchases of food raw materials sold and / or processed going to see what are the main obstacles that do not allow interaction with such tools and collecting insights and observations to improve the service of the

platform that we will take as a case study (online purchasing app of the company Valsana srl).

The same platform taken as a case study, will be compared with both the famous Amazon platform and other competing food distributor platforms to measure, on the one hand, the degree of digitization of customers and, on the other hand, analyze the strengths of digital platforms that, in the BtoB sector, make a tool proposed by one company more attractive than another.

By photographing the current state and detecting the data of current use of online applications for the purchase BtoB of agri-food products from the sample of customers interviewed through the drafting of a special questionnaire, the 'objective that we set ourselves is to identify the critical points that restrain the use of the above-mentioned tool and detect the existing strengths or to be developed that customers need and require to initiate or increase the use of digital APP so that it can become a regularly used tool.

SUMMARY

INTRODUCTION

The world is experiencing an enormous change in all professional environments and in all product sectors and now every choice that a company is willing to make to start, transform or implement its business requires a preventive evaluation of economic, social and environmental and regulatory and technological adequacy.

Despite this, there are sectors that are more inclined to digital evolution and others less so, products and services that lend themselves perfectly to being created, updated, sold and monitored through a smartApp, while others that base their value on human work both in act of creation and in the transformation and marketing phase.

This situation of heterogeneity therefore leads to first studying the different product sectors separately and then subsequently delving into the different product categories and identifying those where the production and commercial supply chain can be improved in terms of production efficiency, organizational efficiency and commercial effectiveness through the use of machinery with 4.0 technologies, software that allows two-way dialogue: man-machine and machine-man and both BtoB and BtoC digital sales applications correlated or even completely integrated with the company management system.

The agri-food and food sector at all levels (from artisanal to industrial), starting from sowing in the field, passing through the laboratories and processing spaces up to the sale or consumption of the finished product by the end customer, he is making real giant strides; certainly the funds

made available by the European Community to member states to facilitate the purchase and reduce part of the cost of all investments in machinery and software so-called "with 4.0 technology" supported by industries, SMEs and artisans, have contributed significantly to convince the entrepreneurial fabric of the validity and opportunity of this choice to invest in digital development and environmental sustainability but, a real need to control, manage and share one's business, whatever it may be, in a more precise, reliable and immediate way , has further strengthened this wind of change and this development process which, despite having begun over a decade ago and having received a strong public contribution push for over five years, saw its true turning point coinciding with the period of health emergency in which not only working methods and processes but also professional and social lifestyles have been changed and are still constantly changing.

Despite this, as already mentioned, there are some areas in which this development process is visibly and clearly slowing down or others where within the same market segment there is a conflict between realities that wish to invest in technological progress and firmly believe in digitalisation of processes and communication within and outside the company and others who struggle to implement any activity aimed at creating new working methods, new ways of managing activities, new rhythms and times and new business models.

What could be the reasons for this different attitude between realities operating in the same context? What could be the main cause of the blocking of these actors? Does "not understanding" the opportunities and

advantages created by technological and digital development derive more from an economic factor or a cultural factor?

The questions raised are of fundamental importance and will follow us throughout the study of the case in question.

The object of the study is represented by the digital sales platform of an Italian distributor of selected, high-quality agri-food and food products; the tool presents, promotes and offers selected items and allows their BtoB marketing both nationally and internationally.

The case in question will analyze the users's knowledge of the platform, the real interest in using it, the critical issues encountered and the development opportunities deriving from the indications and suggestions of the users themselves.

The objective of the research is to identify the necessary elements and improvement aspects to be made to the BtoB sales platform under study to increase the use of the tool both by customers who are not yet using it and by customers who are already placing orders with it so, it will be crucial identify functions and services that the platform should provide to users so that they are led to prefer digital order consultation and management more than any other alternative method used so far.

THE ITALIAN AGRI-FOOD ARTISANS: FROM HIGH-QUALITY PROCESSING TO THE SALES IN DIGITAL CHANNELS

A vast amount of artisan food production companies, are becoming interested in digital opportunities to be able to disclose their work within an environment accessible to anyone (web) and make it easier for buyers residing in any part of the world to purchase.

It is now a daily constant to open landing pages, websites, and social profiles in order to initiate the business proposal and information flows aimed at the outside world and therefore at potential customers, of the references produced by these companies; either independently or through the service provided by web agencies or digital professionals very often coordinated or otherwise supported by the owners of the producing companies.

It is, however, essential to make a premise to this topic since, it is as easy to open one's own showcase on the web as it is difficult to be found by anyone without an advertising force or brand awareness such that there can be a viewing of the content by an audience interested in what is proposed.

Seeking then potential "business customers" or potential "consumers" through the web is the lowest common multiple that is tying most businesses in any field but, it is a very serious challenge indeed that some underestimate and many ignore completely.

A help for small and medium-small realities, to facilitate their knowability through the web and more efficiently and effectively develop sales in

both of the aforementioned commercial channels can turn out to be the sales platforms created and managed by a single entity, uniquely recognized through a clear brand and within which a specific commercial proposal is encapsulated that aggregates and promotes a multitude of small realities otherwise invisible or unreachable.

Consumers and shopkeepers, on their side, in order to be able to find small artisan realities that propose new, creative, genuine and valuable products have always used classic methods and tools, attending trade fairs, rather than consulting trade magazines. Certainly, the experience of using such tools has always proved positive and, the anticipation of the organization of the event or the publication of the periodical has always generated intervals of curiosity for the sure discovery of interesting and useful novelties to one's cause but, unlike the potential of a digital showcase, fairs and magazines contain, in their space a limited offer in terms of time and quantity of producers and products exhibited and proposed.

Here it is that, the visibility that can be given by the digital environment, clearly increases the opportunities for the artisan food world that, having found the right partners and identified the most appropriate communication and commercial strategy for the products offered, can increase its notoriety and create greater awareness and culture with respect to its work.

1.1 - CONTEXT

Agri-food is the leading Italian industrial sector and is worth 538 billion euros, 25% of GDP1, with 3.8 million employed in approximately 70.934 companies. Agri-food companies in Italy are very fragmented and 86% have fewer than 10 employees. These businesses employ approximately 32% of the industry's workforce and produce 10% of the industry's total revenue. They are often family-run and very tied to tradition. Companies have an average turnover of 7.6 for meat and derivatives, 6.6 for tea and coffee, 6.5 for vegetable preserves, 5.8 million euros in the dairy sector and 5.5 for wine (Casaleggio,2020).

There are approximately 70 thousand companies producing food and drinks within the agri-food sector in Italy, 69.291 to be precise, of which 21.626 are joint-stock companies, and 3,675 are growing (Cuccarese,2023).

Certainly not the one and only but, within the international panorama, the agri-food sector is a flagship for Italy that is esteemed and envied everywhere. History, culture, creativity and territorial heterogeneity mix together in a unique and unrepeatable way, giving life to an offer that places quality and the link with tradition above all other elements and values of the production and commercial chain. Precisely these two elements, which identify in a rather central way the style with which Italian agri-food producers think, work and want to present themselves on the market, are at the same time added values and weak points in both the national and international commercial proposal.

Quality, however sought after and appreciated, requires sacrifices in terms of time, costs and quantity of concretely achievable pieces to be achieved and proposed on the market in any type of product and especially in the food sector; then combined with the component of tradition (whether it be a specification to be respected, an ancient local tradition or a family recipe handed down over the generations) the result is an even more particular, profound, complex and limited result! I want to explain these two aspects with a pure passion and that, over the years of practical experience in the field, I consider them both the diamond tip and the Achilles heel of many Italian agri-food companies and therefore one of the most important brakes in commercial development and in general business development as a whole.

Another element of absolute importance for framing the offer of the Italian agri-food sector is the nature of the national entrepreneurial ecosystem: of the 4.4 million companies that make up the Italian entrepreneurial fabric, 95% are represented by the micro-enterprise sector, i.e. businesses with fewer than 10 employees. This is followed by small and medium-sized enterprises (SMEs), which have between 10 and 249 employees and account for 4.9% of the total, and finally large ones with over 250 employees, which account for the remaining 0.1%. If in numerical terms the SME sector of our country is aligned with Europe, with a percentage of the total businesses similar to neighboring countries such as France and Spain, there is a gap in the presence of micro-enterprises and even more so in large ones.

The presence of micro-enterprises in Italy is in fact more pronounced than the European average (93%) and in some countries, such as Germany

(82%). On the other hand, only 0.09% of Italian companies have more than 250 employees, compared to 0.14% in France, 0.19% in Europe, and even 0.48% in Germany. The distribution of employees among the different size segments reflects the size distribution of companies, with a greater share of employees in the smaller company groups. In Italy, companies with fewer than 10 employees are 45% compared to 30% in France, 19% in Germany and 29.5% in the average of the countries of the European Comumunity. SMEs occupy 21% of the total market, a value similar to the 20% of the EU average and of Spain and slightly higher than the 19% of France. For large companies, the workforce employed is only 21% in our country, compared to 33% in France, 37% in Germany, and 33% in the EU. While on the one hand there is a polarization in Italy towards smaller companies, the most significant gap compared to other Member States emerges in terms of productivity between the different size sectors. Companies with fewer than 10 employees, which we have seen are very important in our entrepreneurial fabric, have considerably lower productivity than their European counterparts: they generate on average an added value of 30 thousand euros per employee, compared to 46 thousand in France and Germany and 35 thousand in Europe (Sali and Olivanti,2020). The data that is also expressed in the analyzed context speaks clearly: many small companies that produce, when falling within the same product category, products that are also similar to each other but never the same due to the characteristic components mentioned previously: quality and tradition.

1.2 – MADE IN ITALY

It is unequivocal how much "made in Italy" has been, is today and will always be synonymous with "tradition and quality" for the whole world. The historical component represents in all respects the roots of a tree whose multitude of branches identify the different sectors in which Italy excels and is taken as a reference in absolute terms.

Certainly the fortune of being able to enjoy this recognition is no small thing, on the contrary, but what strengthens this status day after day is also the Italian professional's predisposition to continuously seek the improvement of his business or his products, aiming for quality and innovation; often the term "quantity" is not so much left out, but almost never placed as the "central objective" of the new process addressed.

In the area of Food&Beverage, an important but mostly recent example of the Identification, Growth and Development of Made in Italy worldwide is that of wine. Leaving aside The volumes of the domestic market, Italian wine exports have been growing steadily over the last two decades (with a halt only in this last year in which slightly less was exported than in 2022). The figures are emblematic: Italian wine exports 2003: 2.6 billion euros, 2013: 5 billion euros, 2023: 7.7 billion euros. The performance is incredible especially considering that the Italian production fabric is fragmented and heterogeneous as it consists of about 500,000 companies with an average area under vine of less than 2 hectares. The success of Italian wine traces equally that of so many other products and services made in our peninsula or rather what has always characterized us in

history: the combination of quality and variety, in this case of the types of wine marketed. However, the world of Italian wine was not born with these assumptions; in fact, it is a very recent history whose roots lay their foundations in the tragic Methanol scandal of 1986 in which, unfortunately, 20 people lost their lives and even more were left permanently disabled. Prior to 1986, wine in Italy was considered and was treated as a medium-low and low quality product; it was marketed as white or red table wine or, otherwise, used for the finest wine blends. Obviously, in this view and type of business, the only goal was to achieve quantity by increasing yields per hectare and trying to exploit all that could be exploited from each individual plant. Precisely this (commercial) need brought to the surface the problem of Methanol, which, although a natural component of wine, if its concentration in the product is too high, becomes toxic and even in some cases lethal (as in fact happened) (Wikipedia). This event was for the entire Italian wine world the point of historical minimum and of great uncertainty from which, it could only come out with a complete turnaround but above all by giving credibility and new identity to the category of Italian wine growers! Quality and Biodiversity were the two elements and the two key words that represented the real rebirth of Italian wine! Italy (actually since always) could have taken advantage of its heterogeneity of climate, soil characteristics and composition, and local cultures to create products that were different from each other in smells, flavors and organoleptic characteristics but, the foundations that had been laid did not contemplate these aspects and values and the product had been diminished to its lowest point in history. Today at the Ministry of

Agriculture, Food and Forestry there are 998 varieties of vines cultivated in Italy (National Register of Vine Varieties), 119 IGTs (typical geographical indication), 341 DOCs (controlled designation of origin), 78 DOCGs (controlled and guaranteed designation of origin) are registered, the latter born to enhance within the DOC smaller and circumscribed areas that possess even more particular and distinctive characteristics and peculiarities than the Greater extent of the DOC. (Ministry of Agriculture, Food Sovereignty and Forestry). (Bettiol,2015) Wine producers (or at least a portion of them) began to think by putting differentiation before productivity; the use of native vines communicating by enhancing the local history and culture, the development of new production techniques both in the field and in the cellar, the introduction of methods of wine aging and refinement, but above all the technical and commercial communication aimed at making known the work done and the peculiarities and qualities of each different product completely revolutionized the market of wine made in Italy national but above all international!

Relative to the aspect of Communication certainly a successful case of Made in Italy exported all over the world is that of Cantina Bottega SpA in Godega Sant'Urbano (TV) owned by the luminous and ingenious Mr. Sandro Bottega who, just through a visionary intuition, managed to dress his bottle of Prosecco DOC with a golden dress giving it an exclusive, eccentric, unmistakable and luxurious identity. His bottle, marketed all over the world is the undisputed leader in the international Travel Retail market, beating the competition of all competitors. The merit? Certainly

an extraordinary ability to transfer the value of the product through its packaging in a direct and incisive way, the quality of the raw material and of the finished product made and last but certainly not least in importance, the correct positioning of the product through the choice of the appropriate distribution channel to best convey the project: Travel Retail. Witnessing and crowning the success of the project was the Global Travel Retail Awards through the awarding of the "Best wines product" to the renowned winery of Godega Sant'Urbano. This is the first and only award voted by consumers and dedicated to the travel retail sector, it was established by TRBusiness in 2018, a leading publishing group in the duty free and travel retail sector, in collaboration with m1nd-set, Switzerland's leading consumer research company (Bottega,2022). Returning to the qualitative enhancement and identification of Italian wine products, surely the contribution of Luigi Veronelli (1926-2004), a food critic of the Italian national scene who shaped the 3 identifying elements of the quality and complexity of Italian wine products based on a pyramidal hierarchy, was and still is very useful: place of production (place of cultivation understood as a combination of climate, temperature, humidity, geological features and other elements that make one place unique from another), wine species and finally the Cru: precise and specific location of a vineyard (hill, plain, seashore, lakeshore, etc...), which confers additional characteristics and specificity. Obviously, a decisive part of the process of enhancing the quality product is represented by the producer (winemaker): Technician and artist who brings his flavor and intuition to ensure the best contribution in order to obtain the best possible product to put on the market. (Bettiol,2015). These aspects and rules can be

quietly declined within the entire agri-food sector in which territorial differentiation, the specificity of the agricultural species and the knowledge of the farmer (who produces and transforms the raw material into semi-processed and preserved products) are confirmed, also in this sphere, as the three pillars of Made in Italy craftsmanship!

1.3 – ITALIAN FOOD ARTISAN MANUFACTURING COMPANIES

But what does "artisan company" mean? Is there a clear and precise definition or is it a name attributed to activities that meet some specific requirements?

Let's clarify things a bit through current legislation: "The enterprise can be defined as artisan if its main purpose is the carrying out of an activity of production of goods, including semi-finished products, or of provision of services, excluding agricultural activities and activities of provision of commercial services, intermediation in the circulation of goods or auxiliaries of the latter, for the supply of food and drinks to the public, unless they are only instrumental and accessory to the operation of the business. An artisan entrepreneur is someone who personally, professionally and as owner carries out an artisan business, assuming full responsibility for it with all the burdens and risks inherent in its direction and management and predominantly carrying out his own work, including manual work, in the production process. In any case, the artisan entrepreneur can be the owner of only one artisan business. The artisan business can have a corporate form, including a cooperative, excluding joint stock companies and limited partnerships, provided that

the majority of the partners, or one in the case of two partners, mainly carry out personal work, including manual work, in the process productive and that in the company labor has a pre-eminent function over capital. The company established and operated is also artisanal: in the form of a limited liability company with a single member, provided that the sole member meets the requirements of an artisan entrepreneur and is not the sole member of another limited liability company or a member of a limited partnership; in the form of a limited partnership, provided that each general partner meets the requirements of an artisan entrepreneur and is not the sole partner of a limited liability company or a partner of another limited partnership. In any case, the artisan entrepreneur can be the owner of only one artisan business. The framework law for crafts, admitting the operation of the artisan business in corporate form, places as an essential condition that the majority of the partners, or one in the case of two partners, mainly carry out personal work, including manual work, in the production process and that in the company labor prevails over capital. Furthermore, specific size limits must apply, referring to the number of employees. In particular, the artisan business can also be carried out with the work of employees personally directed by the artisan entrepreneur or by the partners, provided that it does not exceed the following limits: for the company that does not work in series: a maximum of 18 employees, including apprentices in a number not exceeding 9; the maximum number of employees can be increased up to 22 provided that the additional units are apprentices; for the company that works in series, provided that the processing is not entirely automated: a maximum of 9 employees, including apprentices in a number not exceeding 5; the

maximum number of employees can be increased up to 12 provided that the additional units are apprentices (Monteleone,2018); in fact, thanks to sector regulations that allow the "simplified" opening of the food business in an artisanal way and to the sustainable investment necessary to start the production of certain types of food products, there are many cases of starting micro-productions of confectionery, canning, dairies which, starting with very small spaces and in full compliance with HACCP regulations, introduce their own brand and products to the market.

When we talk about artisanal food products, however, the concept also extends to agricultural companies which, respecting the dimensional parameters mentioned above, process the raw material to create processed products of vegetal or animal origin which are subsequently packaged and offered for sale both directly and within distribution channels; here the "food craftsmanship sector" automatically expands significantly and also includes part of agricultural world.

Drawing from literature certainly interesting are two thoughts related to craftsmanship; the first on the 'work of the craftsman the second instead on craftsmanship understood as professional quality linked to the culture and history of an area. In the book *The Craftsman* by Richard Sennet, importance is given to the reflective activity behind the practical works of the professional and which is not based on static and framed bureaucratic reasoning and automatism. Imagination, in fact, is held to be the added value that later gives birth to ideas of technical value. In the book *Futuro Artigiano* by Stefano Micelli, on the other hand, all the traditions, knowledge and know-how linked to the culture of the territory that have

enabled artisan activities to promote products and services with solid foundations and with the ability to make themselves competitive at the international level are taken up and exalted. (Bettiol,2015) Passion and great knowledge of raw materials and processing techniques are at the basis of the success of Italian craftsmanship.

1.4 – FOOD RETAIL MARKET

Specialized food retailing is one of the two sectors (along with medium-high and high level Ho.Re.Ca) that turns its gaze and interest towards agricultural and artisanal food products. The advent of organized distribution is progressively reducing, year after year, these realities which in many cases have been handed down through generations and which, to survive, increasingly aim to offer high quality products, particular and non-ordinary references, proposing companies with little presence in the territory and the added value of the limited quantity of production. Despite this effort, however, the digital market also contrasts with the work of shopkeepers as, increasingly present in its BtoC offer intended precisely for the final consumer, it increasingly seeks to offer that culinary particularity that is so dear and precious to the specialized shop. Within this framework, the reality of specialized resale finds itself increasingly strangled between two completely different competitors but which continuously erode the available commercial ground.

But how many specialized food shops are there in Italy? And how much is the decrease in them? The shops are divided based on the type of product sold (at least for those businesses for which this information was

available). Those that sell food and drinks are 147.407, the relative majority, to which are added 32.145 non-specialised commercial establishments mainly focused on food. They are the ones with the most employees, so we are talking about supermarkets. With the advancement not only of shopping centers but also of e-commerce in recent years there has been a decline in the number of shops in Italy. Between 2016 and 2018, Istat tells us, they decreased by 11.514 units (Truenumbers.it). What tools can be useful for managers of specialized food shops to be able to defend their commercial space and protect the service and skills offered? Could there be digital tools that enhance their work and make it more visible to the public?

1.5 - DIGITALIZATION: AMONG PROCESS MANAGEMENT, DATA ANALYSIS AND ONLINE SALES

Digitization is now the horizon toward which every company is turning. From industrial realities to artisan companies, the ongoing conversion embraces every area of work and every stage of product and service development. There are important stimuli coming from government agencies at the national level, but coordination and guidance is handled by the European Community.

The aim of the EU is clear: to initiate the fourth industrial revolution. "Industry 4.0" stems from the idea of bi-directional interaction of machinery, sensors and dispositive within a defined workflow and through remote coordination and management of Human resource; thus creating on the one hand virtual models of production, on the other hand greater flexibility and integration in the production and processing chains up to

the commercialization of the product including service and after-sales support.

The ultimate goal is to arrive at an effective digital single market composed of interconnected European industrial ecosystems that will be able to interact with other private enterprise platforms, public administration platforms, and electronic payment platforms. Five priority areas of intervention have been identified to activate and develop this digitization process called "Industry 4.0":

1.   5G communications

2.   Cloud computing

3.   Internet of things (IoT)

4.   Data and big data technologies

5.   Cybersecurity

With the European Union's framework program for research and innovation, Horizon 2020, it has on the one hand planned public investments, and on the other is aimed at stimulating private investments to boost more innovations and discoveries by also hoping for inventions that can then become real marketable innovative tools and/or services.

Along with the digitization process runs hand in hand that of sustainable development. In fact, the new Technologies must comply with clear rules and above all possess elements that will contribute to the increase in the added value of the factories of the future; the following are the 4 characteristics that the new Technologies must comply with:

- clean,

- high-performing,

- environmentally friendly,

- socially sustainable.

To better understand where the future of business is headed and how it may change the market, one can consider the specific goals that the 4.0 revolution aims to achieve:

- make production more efficient with the introduction of ICT-based solutions throughout the process and facilitate product diversification and customization;

- reduce time-to-market through increased productivity by using process simulations and realistic design analysis and by realizing much faster test prototyping of products and services to be brought to market.

- realize optimal human-machine integration within the production process;

- efficient and more sustainable consumption of raw materials, working tools and energy sources;

- have companies adopt a single common platform that connects and enables dialogue and exchange and processing of information internally between different business areas and at different stages of production and that can dialogue with other external platforms. (Caccia and Tumietto, 2016).

With respect to this last point, regarding the unified platform within which different information flows, functionalities, processing and management of business data converge, there are two important components in continuous and constant growth, the first one to manage, guarantee and communicate the traceability of documents, data and products through a shared and collective system that allows data to be stored in a digital ledger without the possibility of modification and the second one to

disclose, explain and promote products and/or services on the web and market them to both business and private customers (end consumer*).*

- Block Chain: Literally "blockchain," the Block Chain leverages the characteristics of a computer network of nodes (i.e., computers within the network that have a copy of the Blockchain ledger) and allows for the management and updating, in a unique and secure manner, of a ledger containing data and information in an open, shared, and distributed manner without the need for a controlling entity. The usefulness (and innovation) of Blockchain is to disintermediate interactions of various kinds; banks, notaries, financial institutions and other professional/guarantor and auditing bodies can be replaced by this technology that armors each piece of data, tracing it back to the sources belonging to it in a certain and immediate way. Transparency, verifiability and immutability are the 3 most important characteristics that distinguish Block Chain technology. (BlockChain observatory and Web3, 2023)

From 2016 to May 2023, the blockchain sector in Italy has attracted investments totaling about $163.5 million. (Bisardi and Palermo,2023)

- E-commerce: it is the tool that allows commercial transactions to be carried out within the Net; products and services of various kinds can be bought and sold, using third-party software having preset themes and templates and without any need for special configuration, maintenance or securing or through proprietary platforms developed from scratch and built, through a specific computer language, on the basis of a precise project.

DIGITAL PURCHASING IN THE AGRI-FOOD SECTOR

Digital buying and selling of goods and services continues to grow year by year replacing traditional analog business. Within the broad spectrum of Transaction 4.0, e-commerce is the most concrete glue between manufacturing and commercial realities as well as the most commonly used and most easily understood innovative service by any actor in the system. Owning an online storefront for a manufacturer, be it directly owned or third-party, allows not only the mere presentation and sale of the product, but the provision of a whole set of information, pre-sales services, technical data and after-sales services and assistance that is absolutely not to be underestimated.

Today more than ever, quick access to the information one needs and prompt support should there be any problems or checks to which answers and documents can be provided quickly, can be provided solely and exclusively by the digital network where company and product information is saved, published and sorted. In reality, it is not the e-commerce alone that acts as a container and provider of data and information but rather the complete kit represented by the website, landing pages (where they exist) and precisely e-commerce. Usually The three elements turn out to be united and in any case part of the same complex structure and almost never divided and separated as separate entities.

While retailers (commercial realities), targeting only the final consumer create and offer online e-commerce "btoc - business to consumer," manufacturers have the possibility to target both shopkeepers and direct consumers by developing an e-commerce with dual purpose of use and with two different business proposals in terms of prices, supply conditions and attached services; in doing so, manufacturers build two different e-commerce: e-commerce "btoc - business to consumer" and e-commerce "btob - business to business.". The operation of a btoc e-commerce, is very easy to understand by the buyer/consumer. There is a business proposal from the manufacturer or retailer (it is either of products or services or both), which tends to be sorted and divided into categories of products/services that can be searched through a special search engine (usually marked by a magnifying glass and an editable space that allows the entry of the keyword useful for locating the object); the potential buyer can then consult the entire proposal of objects provided by the site and related to the indication provided by the interested consumer, then read the descriptions, technical information or reviews of other users who have previously purchased them. If the interest turns into a purchase choice, the buyer has to select the product/service, define the quantity he/she needs then place it in the "shopping cart" (a digital place where all the selected products/services that the consumer is interested in purchasing are collected); the last step in order to finalize the order, usually involves selecting the payment method, filling in the 'delivery address, the type of pickup/delivery service.

For the seller, on the other hand, the management of e-commerce is neither easy nor fast; the nerve point for the supplier is the constant updating of the product catalog as well as all the information that can change over time both, as far as the economic side is concerned, as well as the management and technical side: prices, promotions, availability, pieces per package, weight per piece, ingredient, allergens, order minimums, guaranteed transportation costs and timing as well as all that information processed by the company's marketing that allows for better and more effective communication with the customer (aimed, of course, at higher purchase conversion): effective product sheets, customization of price lists and categorization according to socio-demographically different buying groups or according to the type of use of the products or even according to the context and situation of use. Finally, there are two very important aspects for the seller to study, build, enhance, and best propose within their e-commerce: the first is an effective strategy of cross selling (a process in which one proposes and finalizes Sales of products that are complementary to the one chosen first) and up selling (a process in which one proposes and finalizes Sales of products that are better / of a higher level than the one sought) and the second, a service during the sale and after the sale, of customer loyalty (for example, "informing them about the progress of the delivery [...], even when it is entrusted to third parties [...], which leaves a positive memory." (Fumarola, 2017)

Before delving into the evolution of the use of E-Commerce in recent years be it "BtoC" or "BtoB" or "CtoC" we can see together through the image below, a nice and concise summary of the evolutionary stages of the "E-Commerce" project and related services since its inception.
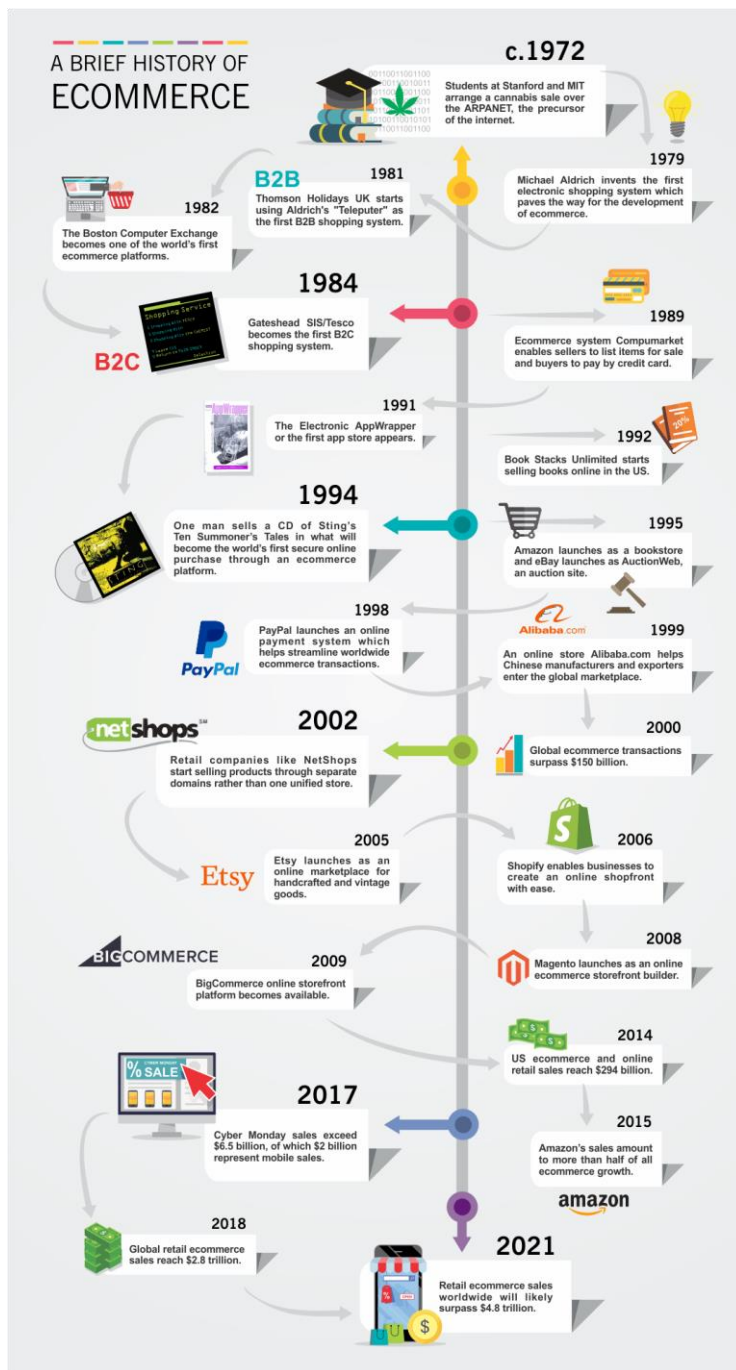
Source: https://blog.meerkerkonline.com/what-is-ecommerce/

2.1 - PRE AND POST-PANDEMIC DIGITAL PURCHASING

Many people think that the Covid 19 Pandemic has disrupted the attitudes of people and businesses by giving new rules and new tools for living and relating with others but, in reality, it has only allowed them to focus, both on the side of the proposer and the consumer, on developing and analyzing Communication and Digital Services to enable the operation and exchange of ideas and products even from remote, in a more practical, fast and engaging way than had been done until then.

Looking at the numbers, global ecommerce in 2019 (before the Covid 19 pandemic) realized a turnover of more than $15 trillion, between B2C and B2B. B2C, or online retail commerce (aimed at the end consumer), weighed 23 percent of the total in 2019. B2C ecommerce worldwide is worth more than $3.5 trillion, up 20 percent from the previous year (2018); reading these figures shows how the global health emergency helped speed up a growth process that was already well underway. In 2019, B2C e-commerce accounted for 14% of total retail sales worldwide (up +15% from the previous year). On a global scale, 31% of digital shoppers are between 25 and 34 years old, 25% are between 35 and 44 years old, 20% are over 18 but under 24, and finally 25% are over 45 years old.

Coming down to the Italian reality, 12% of companies develop digital sales through an e-commerce and, 79% of these e-commerce are BtoC oriented.

This figure is related in an important way to the decrease of physical stores that, in the last decade, has seen the closure of about 63 thousand stores and, to the parallel increase (registered at the National Business Register) of active companies with primary or secondary ATECO code that identifies online commerce (47.91.1); in 2019 there are 6,968 companies registered with such codes, 20% more than in the year 2018. Businesses registering with primary codes are 68 percent (up from 54 percent in FY 2018).

Looking at the data on eCommerce in Italy, before the advent of the Pandemic, surely it is interesting to note that the use of smartphones for digital purchases was already considerable: more than 76% of the sample of Italian consumers surveyed (survey conducted by Casaleggio Associati) purchased in 2019 at least once using either smartphones or tablets and, this channel counted, in that precise period, for more than 43% of the e-commerce turnover of Italian companies.

Finally, before proposing some data on online sales in the period just after the international health emergency, a certainly interesting information comes from the analysis carried out just the first month of the pandemic, both in China and in Italy, with respect to the propensity to purchase online products that were ordinarily purchased directly on site then in physical stores; the confirmation in moving the mode of purchase from one way to another was given by 50% of the Chinese sample and, 31% of the Italian sample. (Casaleggio,2020)

To understand the development of interest in and use of digital tools for online shopping subsequent to the Covid-19 Pandemic, we need to consider research data developed since the year 2021.

In the first quarter of 2021 alone, more than 33 million Italians (more than 55 percent of the national census population at 59.240.329) made at least one online purchase in Italy FMCGs have been seamlessly integrated into the digital sales proposition and, at the same time, have gained wide acceptance from customers who are, progressively, converting their style of searching, buying and paying for such products.

In fact, for FMCG, the year 2021 records a +23% growth in online sales for an economic value of about 1.8 billion euros of increase and 7.8 billion euros of total business, and a weight of 2.5% of the total sales in the country (Italy).

Growing strongly compared to the previous year's survey (+ 37.18%) is the presence of owned eshops within the analyzed sites.

Starting from 78 eshops surveyed at the turn of 2019 and 2020, this rose to 107 eshops in 2021.

It was noted, however, that not all sites and e-commerce are born and then progress over time, there are in fact cases in which there is precisely the closure and subsequent cancellation of the digital storefront;

Data in hand, out of the analyzed sample of 41 cases, there were 35 new openings (85 percent) and 6 closures (15 percent).

The balance is obviously very positive and highlights how the business of online sales is growing and is being considered and initiated by more and more companies, but we must also take into consideration the fact that not everyone is able to manage it and that for, some of them, the management may also be anti economic. Certainly it is not easy to identify the causes or at any rate to identify the aspects that negatively lead to the failure of some of these projects but, focusing in our case, on the agri-food sector, the logistical complexity especially for goods that travel at controlled temperatures and those with very short shelf-lives is really considerable and the costs involved are very high. In general and in any case, in many different commodity sectors, logistics represents, one of the most important barriers to entry and a crucial expense component for the development (or failure) of the sales project in the digital channel. (Checchinato, Finotto, Mauracher, Agostini, Marcon, Colapinto, Camporese, Favaron, Lovat, Reffo,2022). Moving from 2021-2022 to 2023 The data confirm the growth trend of B2C eCommerce purchases by Italians reaching 80 billion euros in value (+27% compared to 2022). (Casaleggio,2024). Looking at the different product and service segments and sectors, we find the Tourism and Transportation sector growing strongly in digital business, with the value of online purchases reaching 19.2 billion euros (+25% compared to 2022). Product eCommerce in general exceeds 35 billion euros (+8%), a growth less steep than in previous years and largely linked to inflation. '*Online B2c eCommerce in Italy continues to grow, although more slowly than in recent years, and has now assumed such relevance as to be considered central and indispensable for the evolution of Retail* ' (Perego,2023) '*However,*

inflation, regulatory changes, and the growing attention of public opinion and institutions to the protection of the individual, as a consumer and as a worker, make it necessary to continuously transform the eCommerce value chain. Today, the challenge for merchants is especially oriented toward flexibility (to counteract contextual uncertainty and to respond quickly to changes in monetary policies and consumer habits) and sustainability (to ensure compliance with social principles and environmental protection)'. (Liscia,2023) *'There is also a growing attention in the development of social and environmental sustainability initiatives. The first area includes corporate welfare actions, projects to support local communities or humanitarian initiatives, and activities to support Diversity & Inclusion. In the second, there are projects especially in logistics, such as the adoption of recycled packaging for shipments, the use of electric vehicles for last-mile deliveries, and the expansion of the PUDO (Pick Up/Drop Off) network'*.(Pontiggia,2023)

It is evident how the future of online sales (and purchases) will be increasingly vocated to provide services and values that go to increase the sustainability of the product to improve the conditions of the environment and the human context that participate passively and actively in the realization of the same as well as of the buying subjects during the product purchase and post-sale phases.

Another aspect of fundamental importance and on which concerns and will concern a considerable challenge among market competitors is the knowability of the proposed products/services. In fact, it is not enough to propose them in a fascinating and unique way on one's own website; rather, the future of retail will be increasingly devoted to omnichannelality: that is, the customer journey, may start from one's own social channels, continue in a physical store/location and finally extend into one's own e-commerce or through an app (which may provide additional services, entertainment, promotions dedicated to those who buy online). It is in fact unquestionable and certain the goal for those who create a buying proposition to reach the customer through as many touch points as possible. In this regard, taking a cue from the Chinese market (which is an absolute pioneer on this new approach), shopstreaming, i.e., live shopping during live on social or proprietary channels and apps, is also distinctly inserted among the various sales channels. With society's use of social media it is practically a certainty that, this mode of business proposition will capture an increasingly large share of digital purchases. A last interesting post-pandemic data surely is the one that orders the digital marketing activities that are used in the company: in order of importance, they are considered fundamental: Website and e-commerce by 57% of respondents, e-mail by 46% of respondents, Linkedin profile at 41% of respondents, Instagram by 22% of respondents, Facebook by 21% of respondents, Youtube by 9% of respondents, Tik-Tok by 1% of respondents. (B2B Marketing Observatory - Marketing Arena Spa in collaboration with Cà Foscari University of Venice Department of Management, 2023).

2.2 – E-COMMERCE BTOC AND BTOB: DATA COMPARISON

According to Casaleggio Associates, by the end of 2019, global e-commerce-related revenue was more than $15.7 trillion. Of this more than $3 trillion represents B2C purchases. B2C ecommerce would account for more than 14 percent of total retail; this is up more than 15 percent from the previous survey alone, and if the pace remains constant, B2C online purchases alone could soon exceed $5 trillion in value. In this way, it is easy to see how the digital buying and selling revolution is increasingly becoming deadly for traditional retail and for merchants who have been unable or unwilling to evolve by at least making upgrades in both the storage of products on the premises and in the Communication and selling proposition of products using digital tools. The Business to Consumer market in the digital context is now well branched and easily found among companies. In fact, half of the Italian companies are present on marketplaces, although the proprietary website remains the preferred channel and more easily implemented and started. In terms of performance, about 50 percent of customers' digital turnover comes from the proprietary site, 23 percent from marketplaces, 8 percent from social media and the rest from other channels; in addition, business on marketplaces for 49 percent of companies that have at least one activated user, on average affects less than 10 percent of total turnover for 19 percent of companies affects from 11 to 25 percent of turnover, for 23 percent of companies 26 to 50 percent of turnover and finally 9 percent of companies with an incidence ranging from 51 to 75 percent.

45% of those who are subscribed to one or more marketplaces are active on 2-3 platforms at the same time, while 30% only on 1 platform. 25% of companies sell on more than 4 platforms. The most used marketplace? Obviously Amazon with 38% of companies enrolled. (Casaleggio,2020).

Having an e-shop is not the only option to propose one's offer to consumers. Some companies, sell their products through intermediaries: multi-product/multi-service platforms or specialized distributors who handle online sales, managing their costs and tasks. The survey found that only 10 percent of companies market themselves through a third-party platform or a distributor's platform. In certain situations and when the company deems it convenient, the chosen partner is identified as the sole and exclusive provider of the business proposition in a given more or less large area. Even on the manufacturing company's own site, the third-party platform in which The products are on sale is signaled and advertised (or even linked). In the agribusiness sector it still seems that this digital business opportunity managed by a third party is not widely followed and felt by companies, as owners still look at online sales with perplexity and, those who do understand its potential at the moment tend to rely for the most part only and exclusively on their own platform.

Just to have a parameter that effectively describes the perplexity of agribusiness entrepreneurs on this issue, only 21 companies out of 566 total surveyed (3.7%) in fact confirmed the possibility that one can buy one's own product in other sites, other than the institutional one where the proprietary e-commerce is present; moreover, these third party platforms are often selectors of local products that gather a more or less large group of producers in the area. This points to the importance of context in the process of digital transformation and approach to new sales methods, both with reference to the possibility of finding local, thus geographically close, realities that can act as digital intermediaries, and with reference to the value of territorial brands. Trentino and South Tyrol have developed associations over the years that protect and promote the quality and authenticity of locally made products, which at this time are shared by local e-commerce platforms that aim to give voice to small producers who likewise, with their own forces or at any rate with an online sales window on their own site would not be able to attract new customers, creating a large basket of territorial specialties to sell to customers wherever they are. Analyzing the size aspect, the size of businesses, it is the smaller ones that adopt e-commerce (32.78 vs. 37.41 employees). Combining this figure, with the above findings with regard to the presence of small realities within third party online sales aggregator platforms , we might think that, larger companies, with better distribution capacity in the territory, do not have such a compelling need to increase their visibility to increase their sales or that in any case, the path of revenue growth, larger companies develop it through the commercial channels already in place and, with good quality performance;

especially if these companies are included with one or more products within organized distribution, a partner capable of giving the product visibility in the market, widespread availability, shelf value and, above all, skills and economies that never these companies could develop alone. Having products within GDO chains has many positive sides (The main ones described above) but it also entails some criticalities that impose a reasoning in the preventive stage; in fact, often, a brand inserted in GDO struggles to find space in the territory where the chain is present and also in the neighboring one, within specialized stores and restaurants; the need on the part of the latter to have different products than the Supermarkets with which they are confronted and clash on a daily basis, in order to differentiate themselves, tell a different story and boast types and quality of products that are not easily found in the vicinity, does not leave room in fact for all those realities that choose to collaborate with distribution chains. There is almost always a solution to the problems, however, and, in this case, it would come in the form of differentiating the offering either in this channel or in the online channel (either one or the other, depending on where you want to place the primary brand) with product customizations. Obviously, in order to carry out an alternative project of this size, there must be behind it a structured company with skills and organizational capacity such as is usually found in SMEs and not in micro-enterprises. Another difficulty encountered for the development of online sales, is the need to possess skills and manage the operation in a very organized way: daily availability, elasticity in the realization of volumes required by large online e-tailers, knowledge and ability to manage logistics, especially, the three most delicate aspects: very short

shelf life, cold chain to be respected, returns for non-compliance. (Checchinato, Finotto, Mauracher, Plechero, Rinaldi, Agostini, Marcon, 2023)

Digital business-to-business is growing strongly, the B2B Digital Commerce Observatory of Netcomm (the Consortium of Italian digital commerce) conducted a survey of a sample of 400 companies with turnover above 2 million euros; this survey shares how by now the share of Italian companies in digital B2B has reached 61%, divided between companies with their own eCommerce site or operating through a marketplace, a +11.7% compared to 2021. Seven out of ten Italian companies, both small and large, plan to invest in the digitization of B2B relationships, but only 17 percent allocate an important share of their turnover (between 2 percent and 5 percent) for research and development and investments aimed at the technological and digital development of their sales proposition. Research by the digital B2B Observatory of the School of management of the Politecnico di Milano reveals that, B2B e-commerce (understood as the value of transactions in which the order is exchanged in digital format) is worth 453 billion euros in Italy, +12% compared to 2020, accounting for 21% of total Italian B2B transactions. (Cagnazzo,2022)

The Digital Service, however, in order to be performant and have room for growth can in no way lose pieces along the way and not provide the same facilities, opportunities and even the same well-being that the analog method used so far has always guaranteed. '*The possibility of customer loyalty through the improvement and innovation of the service offered has become the main reason that drives companies to digitize B2B business transactions*'. (Liscia,2023) In this digital business revolution, customer loyalty, must remain the main objective, which achieved allows not only to obtain gratification from the immediate human and economic point of view but also allows to create that bond and complicity between the parties that structures the relationship and allows its growth over the years. It is precisely this that will be a distinctly importance on which we are going to investigate through the research that will be administered to a heterogeneous sample of business customers who reside and carry out their activities in the Veneto and Friuli territory.

The aspects we have talked about so far, however, are not understood and processed homogeneously by all potential digital sellers; rather, there are varying degrees of sensitivity, links to the uses and methods hitherto used for business management as well as distrust of digital tools, whatever they may be; precisely in this regard, the research of Netcomm's B2B Digital Commerce observatory, divided the companies it surveyed into 4 levels of presence in digital, ranging from the Heavy Digital (heavily digital) to the No digital, passing through the "eCommerce oriented". Let's start with the Heavy Digital ones: through its survey Netcomm found 27% of the sample conforming with this profiling; this type of company, has already activated processes and services for digital channels in a structured way and are present in the market with all three business phases well organized: pre-sales marketing, the site with eCommerce and post-sales services. These companies firmly believe in the importance of the digital component for the development of their market and beyond. They also consider digital technology to be fundamental for the improvement of internal process management and the evolution of production systems, integration between different company machinery and remote monitoring of the different stages of the production system.

These companies do not consider themselves to have arrived, but are aware that digital evolution is constantly developing and one must keep up with it in order to be competitive within the market in which one is placed.

The second company profile identified is the "eCommerce oriented"; this type of company represents the majority: 34 percent. Among these, 8 out of 10 have a direct digital sales channel while the remaining 2 prefer to be placed within a marketplace; among these, about 30% have initiated online BtoB sales modalities during the health emergency period. The main goals of this type of company are: to increase their market in new geographic areas and to improve the service offered to customers.

The third company profile identified is the "Light digital": this type of company consists of 14% of the cases; these are companies that are starting to create their digital presence but have not yet activated eCommerce (or placed in third-party eCommerce/marketplace); they have some familiarity with the digital tool in the pre-sales and post-sales part; there is interest on the part of these companies in investing to receive support in the digitization process and to implement their own direct eCommerce.

The fourth and final company profile identified is the "No Digital": this type of company, comprising ¼ of those surveyed has not initiated digitization processes; for 40% of these, eCommerce will never be considered. The stumbling block for this type of company is the lack of a profitable vision of digital investments; in fact, both the creation of an online channel for sales and after-sales service and Digital Communication to increase one's notoriety are considered too costly and lacking in economic return. In addition, online sales are also seen as conflicting with the existing direct sales channels. (Lazzati,2023)

Returning to the numbers and the focus for the strategic development of online BtoB platforms, very interesting are certainly the data that confirm the development of these realities: in 2021 the transactions through B2B marketplaces in Italy, grew by 50% compared to 2020 and, 13% of Italian companies have activated and are using a digital BtoB channel for their purchases and sales.

Despite the fact that Italy is a bit behind in the use of blockchain and ledger technologies for the customer-supplier relationship (only 4% of companies have launched actual projects for the implementation of such tegnology 4.0 within their professional reality), the creation of BtoB ecosystems is being structured on the basis of and in relation to these new Technologies to create a unique and related environment in such a way as to allow full integration between the different business functions that have contact with the customer and the possibility of creating a technological infrastructure capable of integrating data present in various databases being able to read and interpret them according to the different technical and business needs within the company.

2.3 – ADVANTAGES AND LIMITS OF DIGITAL PURCAHSING

The development of e-commerce has changed the lifestyle and behavior of customers. As digitization advances, each person has the ability to possess more and more information and manage it through a device. Goods and services can be found, researched, chosen, purchased and rendered directly through the digital environment bringing to the actors of that system advantages that today more than ever cannot be underestimated but that, in some cases, are not fully exploited and in other cases instead are not really considered as children of a system not shared by the potential user. Here is a brief list of the advantages of buying and selling online.

Knowability: the online storefront allows the person offering the product to be seen, known and purchased by anyone around the world (obviously with the limitations of the case related to logistical knowledge, contractual constraints and national regulations).

Time: for both the buying and selling parties, the time savings at all stages of the commercial rapport is considerable; very important is the optimization of travel also linked to a factor of environmental sustainability.

Promotions and discounts: e-commerce allows promotions and discounts to be conveyed at any time and with enormous visibility.

Shopping experience: In general, e-commerce has increased not only the convenience of consumers but also their expectations. Despite the limited personal interaction between an e-commerce site and its customers, there is an opportunity to provide the customer with an excellent shopping experience.

Reviews: Acquiring positive reviews elevate the value of the proposer and the products and services provided; trust towards reviews is very important as much as recommendations from friends.

Alternative or additional proposals: It is easy to convey information about proposals that replace the product sought or even complement it.

Availability 24/24, 365/365: Reaching, 24 hours a day, a global audience and no longer just proximity through an always reachable digital storefront that is present and active.

Returns and Refunds: Returns can be as easy as refund guarantees themselves. This is because they cannot try or see the products in person before buying them.

After-Sales Service: digital support can also be handled in real time to minimize the customer's wait and better meet the buyer's needs.

For a retailer and even more so for a distributor whatever its sector of reference, selling online is not only an option but a real additional resource in terms of increased turnover, increased customer base, increased visibility, simplified work management both for internal staff and for the business or external end user thus reducing business costs; in fact, these last two points turn out to be an important lever that companies take into consideration and to which they attach extreme importance in building their business plan for online sales. The saving of labor costs in the back office part, of costs pertaining to logistics and distribution (more organized and with less use of human resources) as well as the optimization that the digital tool can bring to the drafting of 'inventory then to the organization of stocks and warehouse, represent the objectives to achieve greater efficiency and an increase in the marginality of the company's business. Starting online sales also allows you to take advantage of, the "long tail effect" (Anderson,2016) thus to specialize in market niches that, proposed through physical outlets, would require a long and patient start-up process with a logical consequence of slowing down business development and lengthening the time for the return on the investment made.

Moreover, the web presence, thanks to the flow of data that users leave on the web every day through each and every search and viewing activity, makes it possible to build data-driven advertising and marketing campaigns, i.e., communications that are personalized and tailored to the individual user interested in the products/services being offered. Rather than real disadvantages for the e-commerce business, there may be situations in which the start-up of the project may entail difficulties and initial economic disadvantages; it is up to the company that decides to start this path and project to intelligently and skillfully plan the set of steps that can bring it as quickly as possible to reach a point of balance both in terms of cost-revenue balance and in terms of managing processes with the human resources and tools at its disposal. The smaller and more family-run the company, the more "difficult it might be to manage the profit margin" (Rutigliano,2017); in fact, the size of the company and the product offering proposed online, not only influences the logistical management both inside the company and outside, but a larger company has the ability to ensure a back office service both before the sale and after the sale (through dedicated customer care staff). It is also very important to build a pleasant, straightforward, fast and intuitive experience with the aim of aggravating the customer in the best possible way and facilitating his or her conversion into a purchase; the return service is also increasingly the subject of attention and of great importance by customers who, increasingly expect the guarantee that if the product does not conform, it can be returned immediately with a refund of the amount spent. The Amazon platform, for example, from this point of view manages to go further and, allows the return even for the

unsuitability of the product with the type of use that the buyer should do with it, once the product is viewed.

The goal for all those who sell online is to find and recognize their "typical customer" then understand their buying behavior; the possibility is real thanks to all the information that is left on the web through searches, consultations and publications and from the information that customers themselves leave at the time of purchase. (Casaleggio,2020). Therefore, allowing the customer to have an ongoing relationship with the selling party becomes, compared to traditional physical selling, a huge advantage and strength that, if well managed, in constant comparison with all other competitors, can increment loyalty and propensity to purchase as well as sharing the brand with other potential buyers. *'Although the numbers do not show particularly rosy prospects, digital is now essential for Retail. What is particularly appreciated about eCommerce is its ability to amplify the relationship between brands and consumers and to extend, in spatial-temporal terms, an occasional and discontinuous visit (in store) into a potentially continuous relationship.'* (Pontiggia, 2023)

DIGITAL AGRI-FOOD BTOB PURCHASING PLATFORM: GROWTH PATH

Among online sales platforms aimed at the BtoB agribusiness market, one of the distinctions can be given, echoing what was reported in the previous chapter, by the sales proposition: single-brand or single-product or multi-brand (with several products for each proposing company); the business logic is obviously very different and, if in the first case there is the interest of approaching directly by the producer to the potential business customer, on the other hand there is the possibility and ability to provide by a distributor, a range of products, more or less wide, together with a more organized, fast and complete distribution and service than a single company can do. The discriminator for the choice of one or the other service is given by the customer's need and business strategy in that they may prefer the selection of producers and products that are reachable only through direct contact and that, probably, have more control and awareness of where their product is purchased and offered and have clear distribution and territorial capillarity (to avoid overlapping customers or otherwise unwelcome proximity between competitors who wish to have a range of exclusivity to enhance their choice and distinguish themselves from other choices made by nearby retailers/restaurants. Likewise, the business customer might instead choose the service of selecting and supplying one or more distributors who can facilitate in terms of minimum order quantity, order minimums, logistics costs, and delivery time.

Certainly a very important element is price; going directly to the manufacturer means many times, if there is not a policy of aligning prices for the BtoB proposal through the definition of a single price list to which both the manufacturer and the distributor must adhere, a saving in terms of lower product cost, however, it is not always the case that this convenience for the single piece means a saving to the BtoB customer on the entire purchasing management where other components come into play such as:

- available space: often the retailer or restaurateur has difficulty in creating space for the proper storage of food products; for dry products but even more so for refrigerated products, it is not always easy to have sufficient space for the storage of the minimum orders required by producers in the direct purchasing relationship. In this sense, it becomes crucial to find the method to develop the ideal flow of physical rotation of the warehouse; the inability to store can result in damage to the product and a consequent unsuitability for sale therefore becoming a cost item;

- hourly flexibility: the retailer or caterer may not always be available to receive orders; in addition to opening hours there is not always the possibility of being present in the store or, the time of delivery by carriers is not always known. A unified delivery or at any rate a reduced number of deliveries allows the retailer to be able to handle the logistical issue more easily; time spent receiving and storing as well as waiting for the order (outside of business hours) is a cost item;

- human resources available: the retailer or restaurateur may have (or may not have) staff to support him or her in product selection, purchasing, logistical receiving, warehousing and all back office tasks; having to invest in such a figure, even if it is part-time, is a cost item;

- product research: having the time and passion to research and select the products to be offered is not for everyone; one's time could be spent at the expense of operational work on the premises or assigning the task to a company resource, perhaps predisposed and capable; it is still a cost item to be considered;

- ordering: the time to be spent on placing an order to a single supplier or placing multiple orders to different suppliers with different ways of communicating and handling customer orders changes considerably; in addition to the time spent at the precise moment of order execution, there is also the increased time needed to make the change of tool or method to formalize the order from one company to another: phone call, WhatsApp message, WhatsApp voice, digital platform;

in addition to the fact that, between one order and another there may be problems of forgetting products, incorrect transcription or communication of the order, different times and moments (deferred) for the completion of all orders from all suppliers. (Inside marketing,2021)

3.1 – VALSANA APP: CASE OF STUDY

For the development of the research, the choice fell on a food distributor in the province of Treviso that, since September 2023 has started using a digital application to strengthen the bond with its customers then increase loyalty, providing them with additional tools to be aware of and participate in company information and training events, systematically promote periodic new products and products on promotion, allow clients to consult the entire online catalog, be able to place orders through a system updated in real time with prices and reserved conditions, constantly consult their order history archive, and finally be able to consult all useful documentation for the traceability of purchased products: transport documents and invoices with information on payments made and current due dates. The tool designed and implemented, in collaboration with the supplier software house, by the company Valsana srl is in fact as complete as one can provide to its customers to give them the possibility to interact with their supplier through a specific channel, easily acquired and just as easily used. Valsana srl is a company based in Godega di Sant'Urbano in the province of Treviso, a distributor of high quality food products both in the Italian territory and internationally; it has been distributing for more than 30 years and has a wide and varied assortment that counts more than 500 dairy products and more than 400 cured meats, as well as a wide selection of gastronomic specialties and canned food of high quality and artisanal production.

It invests heavily in the search for special products not found in already established and organized distributions to rely on the aspect of uniqueness and exclusivity. Its strong point is the passion transmitted to the entire work team, regardless of role, to personally meet and get to know the artisans who make the products chosen and distributed by the company.

Table 1: Data and information of Valsana srl

Share Capital	€ 52.000,00
Employees and collaborators	52
Agents	20
Turnover (last year)	€ 26.383.500,00
Products in assortment	2.293 sku
New products included	178 sku
New suppliers included	7
Customers served each month	2.700
Daily deliveries	200 c.a. (average)
Annual deliveries	62.390
Annual invoices	22.740
Rached countries	38
Orders to suppliers:	13.800

3.2 – CURRENT SITUATION: USAGE DATA

The App project for information sharing and online purchasing has taken concrete shape since September 2023 so it has a really recent history and it is difficult to be able to make evaluations that have historical value. it is possible, however, through the company's business management and App monitoring software, to extrapolate data that at least gives us an idea of the current situation and allows us to understand how much the App is being used and for what purpose.

Table 2: Valsana Report about App use

Total % app downloading customers out of total customers 2024	1349/2236 (60%)
Total % app use customers in the past year out of total customers 2024	662/2236 (30%)
Total % app download customers in Veneto and Friuli out of total Veneto and Friuli customers 2024	920/1674 (55%)
Total % app use customers in the last year in Veneto and Friuli out of total Veneto and Friuli 2024 customers	564/1674 (34%)

Viewing % of the "Jamon Iberico cut" event by Valsana customers out of the total 2024 customers who downloaded the app	1235/1349 (92%)
Viewing % of the event "cutting Jamon Iberico" by Valsana customers out of the total 2024 customers	1235/2236 (55%)
Viewing % of the event "cutting Jamon Iberico" by Valsana customers located in Veneto and Friuli Venezia Giulia out of total Veneto and Friuli Venezia Giulia 2024 customers who downloaded the app	920/920 (100%)
Viewing % of the event "Jamon Iberico cut" by Valsana customers located in Veneto and Friuli Venezia Giulia out of total Veneto and Friuli Venezia Giulia customers	920/1674 (55%)
Average order of customers with App (on total customers)	409 €
Average order of customers with	408 €

App (on Veneto and Friuli customers)	
Average order of customers without App (on total customers)	403 €
Average order of customers without App (on Veneto and Friuli customers)	397€

The table shows the first useful data for our future evaluations of the use of the Valsana App, but above all we are able to get a (synthetic) snapshot of the current status of the project. 60% of Valsana's customers are found to have downloaded the App, and similar is the figure for the narrower area of Veneto and Friuli Venezia (territorial area adjacent to the company's headquarters and where the highest density of customers is developed): 55%. On the other hand, the order is reversed when analyzing the users of the App, in fact globally about 30% use the tool while in the Veneto and Friuli Venezia Giulia area the figure rises to 34%. Going to analyze specifically the functionality of promotion and publicizing events proposed by the application, it can be seen that the visualization of the examined event "cutting of the Iberian Jamon" reaches 55% both in the national clientele and in the more restricted ones of Friuli Venezia Giulia and Veneto; even within the circumscribed territory the visualizations carried out, related to the number of customers who have downloaded the App are exactly the totality: 100%.

Finally, the data of average orders placed with and without the app were extrapolated; it can be seen that, customer orders transmitted through the platform both in the totality and in the Veneto-Friuli Venezia Giulia territorial constituency, have an average value higher than those transmitted by phone, wapp message or collected directly by agents; this difference is between 1.6% and 2.6%.

3.3 – OBJECTIVES AND METHOD OF THE RESEARCH

The development of the project is still at an early stage, but the company's interest is to continuously increase the use of the application by customers. The tool introduced is intended, not only to facilitate and speed up the customer's operational phase of filling out and sending the purchase order, but also to share a set of technical, commercial and value information that will allow, on the one hand, the customer to possess everything he needs within a single system and, on the other, to provide the distributing company (Valsana srl) with a tool for sharing data and information in real time. In a nutshell, the buyer, through the app, will be able to have a lot of information and a lot of technical, commercial and statistical data available and under control, while the seller, through the app, will be able to share a multiplicity of information that can be immediately acquired by the buyer and easily archived by the latter. The company is interested and stimulated to offer customers a digital solution that would enable them to use fewer and fewer analog methodologies and tools for consulting information about the products offered and for formalizing the order. By doing so, both parties would find benefit both in terms of time savings (economically estimated) resulting from the use of a digital method that is faster and more streamlined than the previous one and in terms of logistical-organizational savings; the seller because he could get better organized with the management of orders even in times that were until before unused or inefficient within the working day of company employees. The buyer because he could avoid printouts and copies of documentation easily accessible within the app.

As presented in Chapter 3.1, the current situation sees fairly limited use of the app by Valsana's customers; the situation is surely the result of the recent introduction of the tool and thus too short a period of promotion and communication of the product and the project; moreover, as we will see later, the habitual and historical acquisition and use of another (non-digital) method of placing periodic orders creates a wall that is difficult to cross.

Surely there are ways to be able to convert at least a proportion of these customers, but how to identify them? And again, how many customers as a percentage of the total outstanding are predisposed to use the digital tool? Are the resources at one's disposal sufficient to undertake this conversion project? And the path initiated and developed to date, is it correct or are there modifications to be made and changes to be put in place?

In order to be able to find answers to the above questions, it was decided to undertake a study of the two main actors in this project: the agents of Valsana Ltd. and the business customers (shopkeepers and restaurateurs).

Two different questionnaires were created, the first for the agents with 14 questions, was submitted to 8 different resources operating in Veneto and Friuli territory; the second one, on the other hand, for the customers, who, depending on whether or not they use the app at present, answered either 26 questions or 20 questions.

As for the survey of agents, the limited number of subjects to whom the questionnaire was administered does not allow the categorization of "statistical sample," but rather the collection of 70 completions of the questionnaire addressed to and and administered to Valsana customers allows the construction of a real statistical survey precisely through the analysis of a representative sample.

The two questionnaires were carried out with two different purposes, the first, that of the agents, to obtain a snapshot on the current knowledge of the tool, on the sharing of it with the followed customers and finally on the evaluation of the current and future potential through a simple and synthetic identification of the strengths and weaknesses of the digital project; the second questionnaire, that of the customers, to identify the Valsana's typical interlocutor (customer profiling), their propensity to use digital tools, their knowledge or lack of knowledge of the tool and, useful levers to increase the use of those who have already downloaded the app and are using it for news, promotions, document archiving or order drafting or to stimulate those who have not yet proceeded to start any operational aspect with the app.

3.4 – AGENTS QUESTIONNAIRE

Questionnaire was divided into three parts:

First part: study and evaluation of agent knowledge about App;

Second part: study and evaluation of tool sharing from Valsana agent to customer.

Third part: study and evaluation of strengths and weaknesses about Valsana App.

Before start with research, each agent was preliminarily contacted and informed with respect to the purpose of the interview. The need was to immediately give a basis of awareness in order to better address the topic at the time of filling out the questionnaire; despite this, each appointment was nevertheless followed by a sharing and in-depth examination of certain aspects of the topic treated so that it could emerge from each resource, his or her own point of view more complete and motivated than the simple and reductive response of the questionnaire as well as a spontaneous manifestation of satisfaction or dissatisfaction with respect to precise aspects that constitute part of the project in its complexity. These reflections will be included in the next few lines in addition to the surveyed data of the topic in question and will constitute a useful addition that will ultimately serve for the elaboration of the final conclusions.

3.4.1 - AGENTS QUESTIONNAIRE: SECTIONS

First section of agent questionnaire has been created to understand knowledge base and training from which it started; the questions are intended to obtain the agents' information on their knowledge of the app, the training proposed and conducted, their understanding of the app's potential for both their own benefit and the client's benefit, and what potential contraindications they have encountered or otherwise assessed.

Second section have been created to understand the degree to which the agent shares the instrument for the benefit of the client; the questions were concentrated on obtaining recommendations related to the workload and frequency of use of the platform by customers then to understand if the training necessary for the use of the app has been carried out and what the present difficulties and obstacles might be that do not allow customers to use the app in its complexity.

Third section have been created to understand strengths and weaknesses of Valsana App both the customer and the agent, from the agents point of view.

3.5 – BUSINESS CUSTOMERS QUESTIONNAIRE

In the second phase, each agent preliminarily contacted and informed with respect to the purpose of the interview informed some of their customers that, they would be involved in a survey on the knowledge, use and potential of the Valsana srl app. Not all of the agents were able to make themselves available to organize the physical visit to the clients together with the interviewer and thus put in place a direct confrontation with respect to the topic under consideration, but they nevertheless gave their availability for the submission of the questionnaires through the digital channel since the document had also been prepared with the fillable Google form.

Again, the need was to give the customer an awareness base right away in order to optimize the little time available (in physical visit situations) and to better address the topic when filling out the questionnaire; the questionnaire was divided into 4 parts, each of which is given below.

3.5.1 – BUSINESS CUSTOMERS QUESTIONNAIRE: SECTIONS

Questions were initially asked to identify the type and main characteristics of the client in order to be able to correlate respondents' choices and attitudes with their personal and professional situation. They were then asked for biographical data (dividing customers by age group), degree of education (starting from elementary school and stopping at graduation), type of business carried out (dividing retail with catering) and location of their business (distinguishing between suburbs and city center and between towns with citizenship of less or more than 20,000).

Second section has been divided into two parts: the first one collects questions on the knowledge and use of the app by customers who have downloaded it and use it for one or more existing functionalities, while the second one collects questions for all those who have never used it.

On the first part of second section, for customers using the app, the purpose was to obtain information related to how much training has been received, ease of use or otherwise of the tool, purpose of use (going to the main features of the 'App), the facilities that the client feels are most important and meaningful, frequency of use, and frequency and usefulness in receiving the notifications.

On the second part of second section, for customers don't using the app, the aim was to understand the problems and obstacles that have not led and do not lead to start the use of the application, both by looking at the customer's operations and by evaluating the proposal developed by the Valsana company. At the same time, the questions were aimed at obtaining information on the methods used for the execution of orders.

On the third section, questions were developed with the aim of understanding how "digital" Valsana customers are or in any case predisposed to the use of digital tools. An important assessment to be made is on the degree of digitization of each customer by going to find out the degree of use of the digital tool in the context of purchases both for private purposes and through one of the most well-known and famous platforms in the world: Amazon and, for business purposes only, through other apps or e-commerce from other vendors' sites. We chose Amazon because it is confirmed as one of the market leaders e-commerce in the world, with a particularly dominance in the United States, where in 2023 it recorded a 37.6 percent market share among companies for online sales (Casaleggio, 2024).

Last section contains three questions related to the development potential of the application, both for those who already use it and envision implementations to further and enhance their digital experience, and for those who have never used it yet and might (or might not want to) start with certain incentives and assumptions.

The results of questionnaires were analyzed for the first (and major) part through univariate analysis and, in the second part through bivariate analysis by correlating aspects that may have a cause and consequence relationship with each other or instead may be affected by the same situation causing the client, in dealing with them, to engage in similar behavior.

3.6.1 – AGENTS QUESTIONNAIRE RESULTS

Table 3: Report of agents questionnaire (section 1)

Knowledge of the App	8 / 8 know Valsana App
Receiving learning session	5 / 8 report that they don't received training, the other 3 confirm that they received training on only 1 occasion
Utility	3 / 8 considers more useful the app for the agent, differently 5 / 8 they find the app most useful for the customer
Contraindications for agents	3 / 8 agents believe that there may be contraindications for the agent; these the contraindications shared: - Less frequent passes and thus risk of losing contact with the agent.

	- If used superficially it can loosen the relationship built between agent and customer. - Customer may gradually require less and less agent presence and support
Contraindications for customers	No agents believe that there may be contraindications for the customers

The application is known by all Valsana agents but only 3 of them confirm that they have received complete training from the company (the other 5 declare that they have been informed of the tool but not trained). All agents recognize the usefulness of the tool, and the majority of them consider it more useful for the customer than for the agent. In fact, they consider the agents contraindications only to the detriment of the agent and not of the customers, namely: less frequent passes and thus risk of losing contact with the agent, if used superficially it can loosen the relationship built between agent and customer, custmer may gradually require less and less agent presence and support.

Table 4: Report of agents questionnaire (section 2)

Density of use from customers	6 agents have less than 10% of customers placing orders through the app regularly, 1 agent from 10% to 30% and only one have over 50% of customers who are using Valsana App.
Frequency of customer	4 agents have trained about Valsana App each customers from 1 to 3 times, 2 agents have trained

training	each customers only 1 time, 2 agents have never trained.
Barriers for the use	Disinformation: 4 / 8 Culture: 4/8 Acquired work style: 7/8 Little digital inclination: 6/8 Customer's interest in maintaining human contact: 5/8 Lack of an economic incentive: 0/8
Usefulness of the economic prize	5 no 3 yes
Recommended incentives	- Improve link and interaction between App, newsletter and magazine article - Knowledge about products not available and substitute product suggestions - Economic rewards for agents who convert customers to using the App.

The use of the App is currently rather limited, the clear majority of agents (6 out of 8) declare that less than 10% of their customers use the App; However, there are two of them that exceed this threshold, the first declaring a use of its customers between 30% and 50% and the second even above 50%. These data are linked to the training carried out by Valsana agents:

50% of the agents interviewed explained the App to their employees at least 1 time but less than 3 times, 25% say they have only done training 1 time and the remaining 25% say they have never done training. In the analysis of the obstacles, at the top of the ranking are found in ascending order: in third place the interest in maintaining the human relationship with the agent without it being replaced by digital self-employment, in second place the lack of digital propensity of customers and in first place the acquired and consolidated work methodology that does not want to be varied by the customer (comfort zone). The majority of agents consider the economic incentive not useful or interesting for the customers while they consider other incentives with the potential to convince the customer to start with the use of App: Improve link and interaction between App, newsletter and magazine article, giving possibilities to Know products not available and substitute product suggestions and establish economic rewards for agents who convert customers to using the App.

Table 5: Report of agents questionnaire (section 3)

Strengths for the agent	Time Savings: 8 / 8
	Use of time gained for visiting new customers: 6 / 8
	Ease and immediacy of novelty presentation: 6 / 8
	Use of time gained for presenting new products, proposals, ideas and events and not collecting orders: 6 / 8

	Use of time gained to strengthen friendship and complicity with the customer: 5 / 8 Reduced risk of making transcription errors or forgetting references in order entry: 2 / 8
Other strengths for the agent	- App helps when it is difficult to arrange the appointment with clients who have very limited hourly availability. - Customer is more autonomous in requesting info such as price, weight, code etc. - Paper savings and news always up to date and available. - The customers have more information with only one tool: image, average weight, price list, quantity and u.d.m. orderable. - The tedious and repetitive work of pure order collection would be lost.
Strengths for the customer	Time Savings: 8 / 8 Security in order transmission: 2 / 8 Reduced risk of forgetting references, thanks to the list of products already purchased: 5 / 8 Reduced risk of error in references, thanks to direct order entry: 2 / 8

	Faster and easier search for new items: 6 / 8
	Use of time gained to talk about new products and ways of using the product: 5 / 8
	Use of earned time to talk about personal issues that help agent-customer bonding: 3 / 8
Other strengths for the customer	- Access to the invoice to be ready to receive the goods. - Being able to place the order at any time and at any time of the day.

The advantage voted unanimously by the agents is the time saving also to have a less frenetic and hectic work rhythm, followed by the use of the time saved for visiting new customers (possibility of increasing turnover), the ease of proposing and making known the news through the App and again the use of the time saved to present the news in a better and more complete way and share ideas and technical aspects of work that can convert to new products suggested and new sales. The agents also expressed other advantages in their favour: App helps when it is difficult to arrange the appointment with clients who have very limited hourly availability, customer is more autonomous in requesting info such as price, weight, code etc., paper savings and news always up to date and available., the customers have more information with only one tool: image, average weight, price list, quantity and u.o.m. orderable, the tedious and repetitive work of pure order collection would be lost.

According to the agents, the advantages for customers are the same as those deriving from the use of the App, with the exception of one point particularly relevant to the customer category: the reduction about risk of forgetting references, thanks to the list of products already purchased. In addition to those listed, there are two other benefits for customers that have been identified by agents: access to the invoice to be ready to receive the goods and being able to place the order at any time and at any time of the day.

3.6.2 – CUSTOMERS QUESTIONNAIRE RESULTS

Figure 1: Breakdown of customers by age

Age of customers: 70 respondents

3%
21%
51%
25%

Legend:
- 20-30
- 31-40
- 41-50
- +51
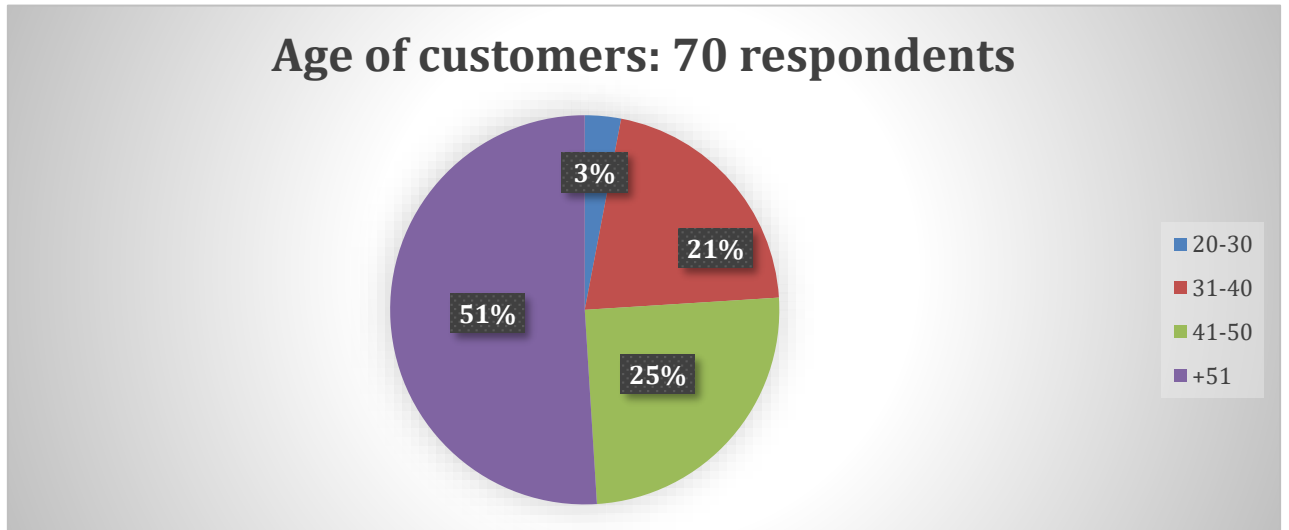
Figure 2: Breakdown of customers by educational qualification

Educational qualification: 70 respondents

4%
11%
85%

Legend:
- elementary school
- secondary school
- university degree
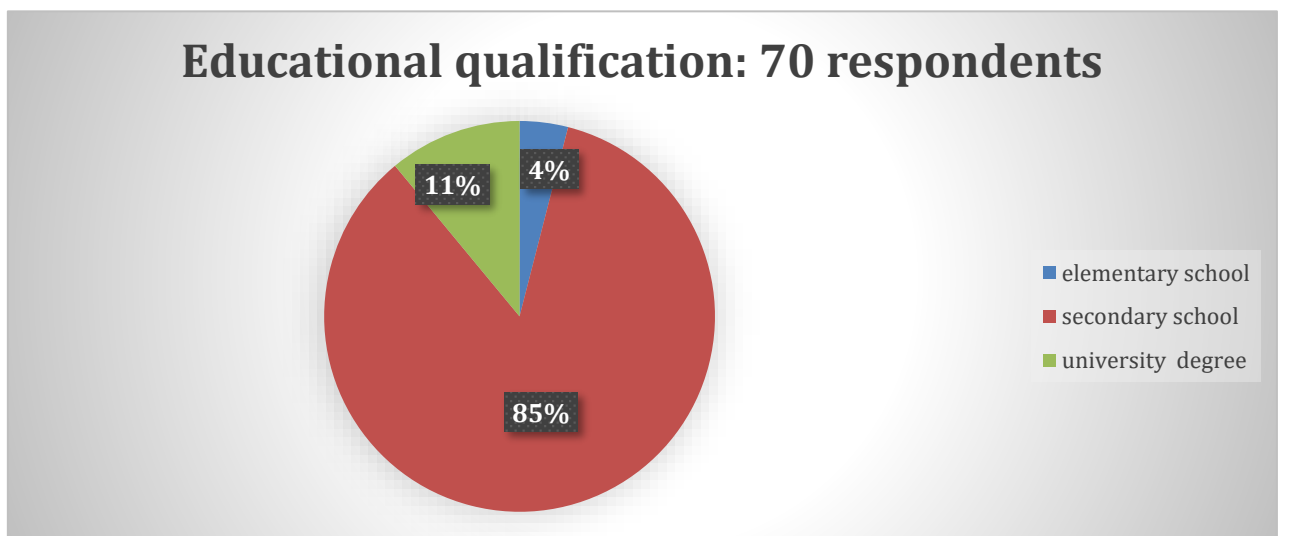
Figure 3: Breakdown of customers by kind of activity
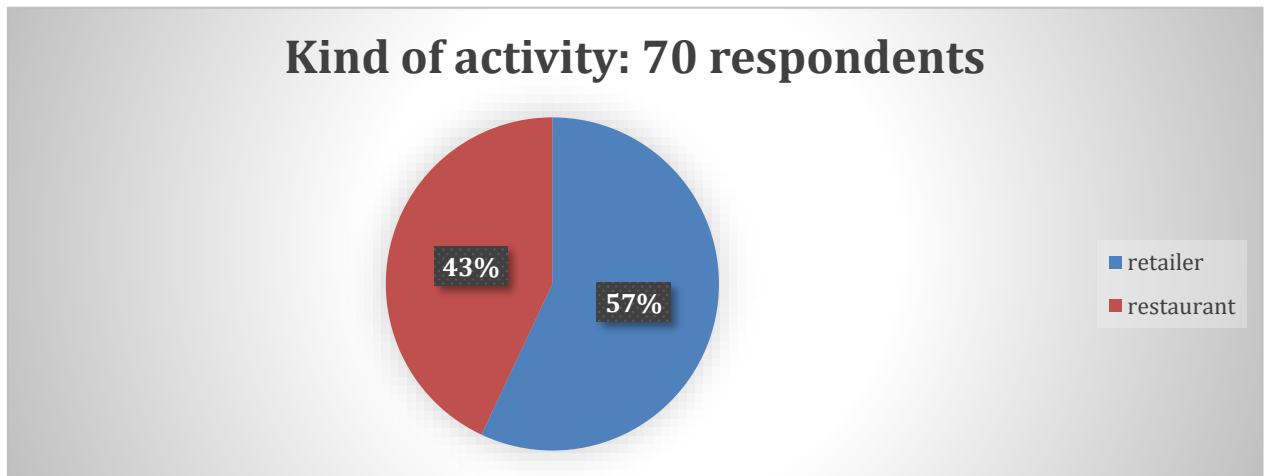
4: Breakdown of customers by kind of business location
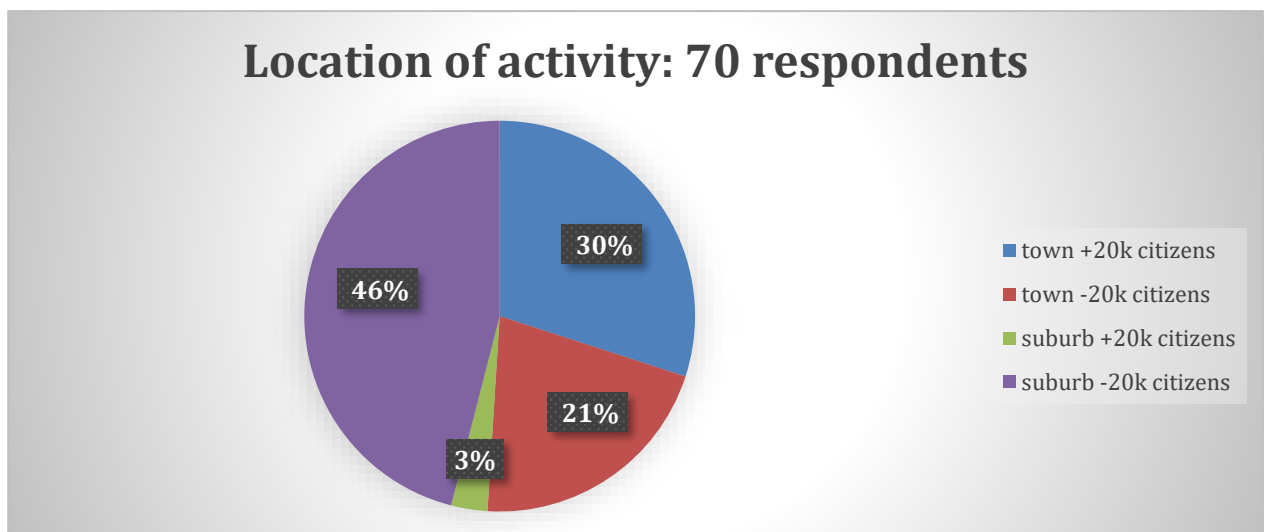
The first part of the customer questionnaire shows the predominance of customers over 51 years old (51%) while the under 40 component is very small (24%) furthermore, the absolute majority of customers have a secondary school education (85%).43% of the customers interviewed have a restaurant business while 57% have a food retail business. The location of customers is quite varied, with none of the alternatives exceeding 50%; however prevail suburbs with a population of less than 20,000 (46%).

Figure 5a: Breakdown by use of the App

App usage: 70 respondents

47%   53%

- yes
- no
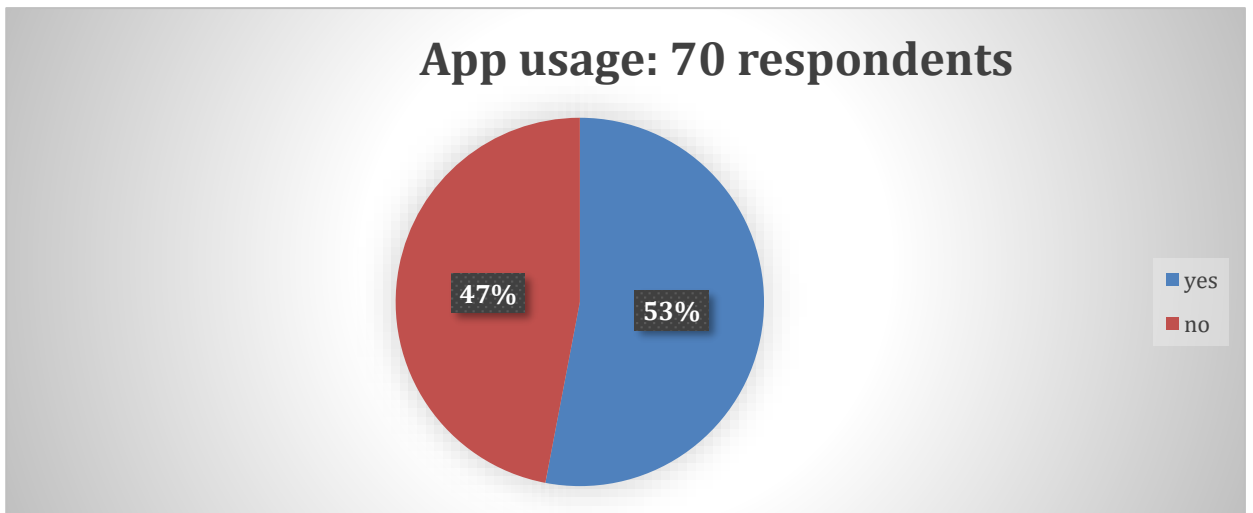
Figure 6a: Breakdown by degree of App difficulty of use

Degree of difficulty of use: 37 respondents

3%   13%   30%   54%

- difficult
- normal
- easy
- very easy
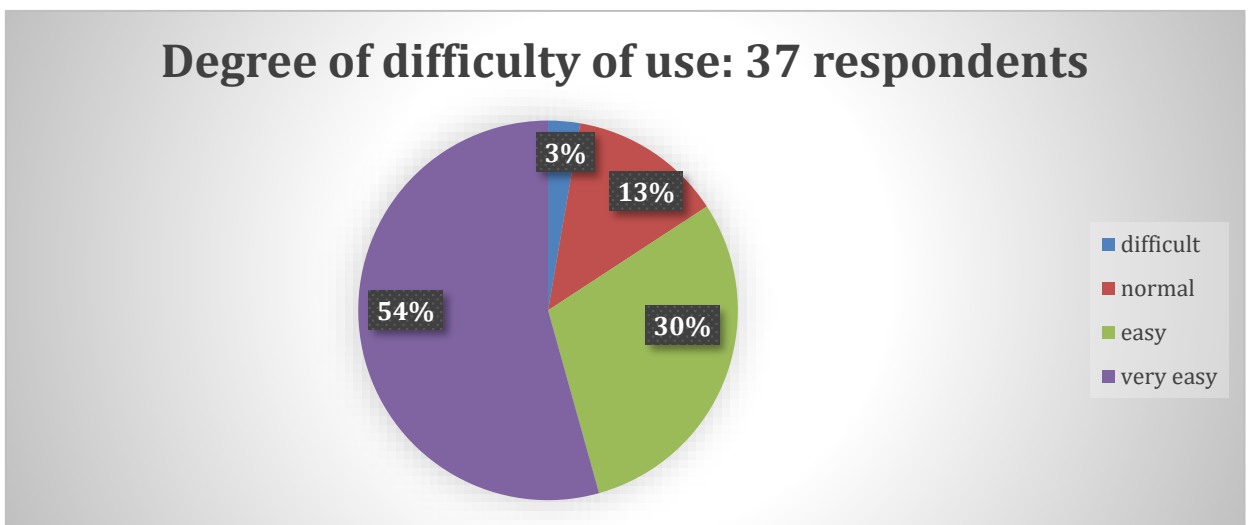
Figure 7a: Breakdown by amount of training

App Training: 37 respondents

Legend:
- no
- 1 time
- +1 / -3 times
- +3 times

- 49%
- 32%
- 14%
- 5%
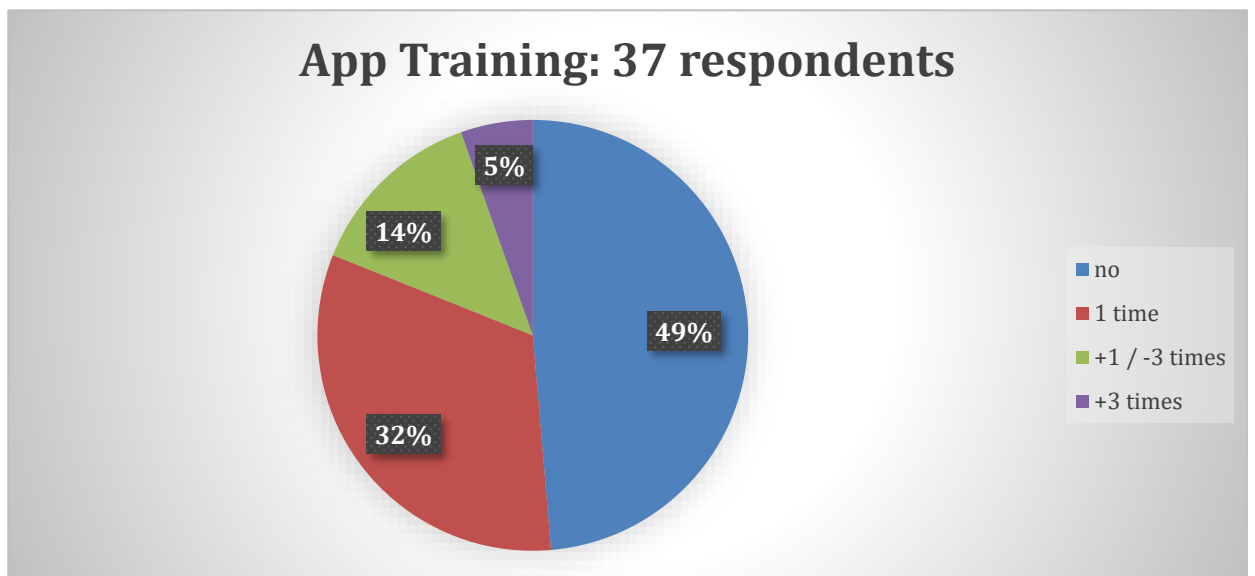
Figure 8a: Preferences expressed of App usage

Kind of App usage: 37 respondents

Catalog consultation	News consultation	Ordering	Event booking	Downloading ddt and invoices
9	7	21	8	1
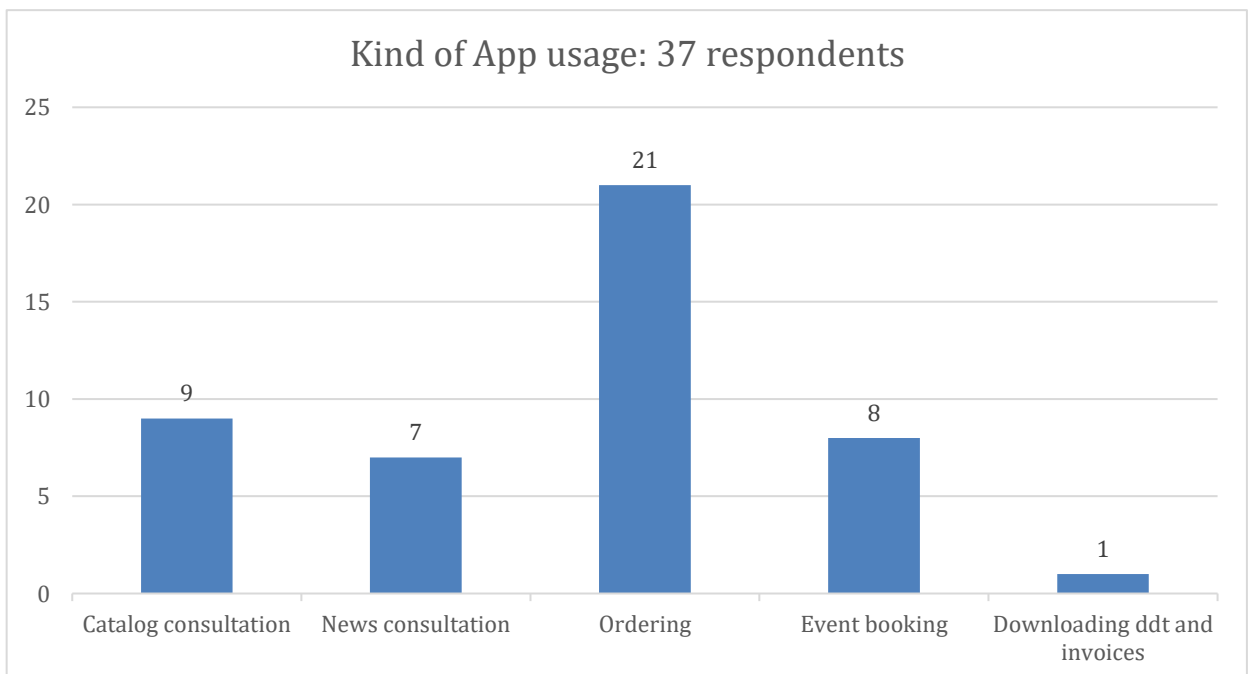
Figure 9a: Preferences expressed of App benefits
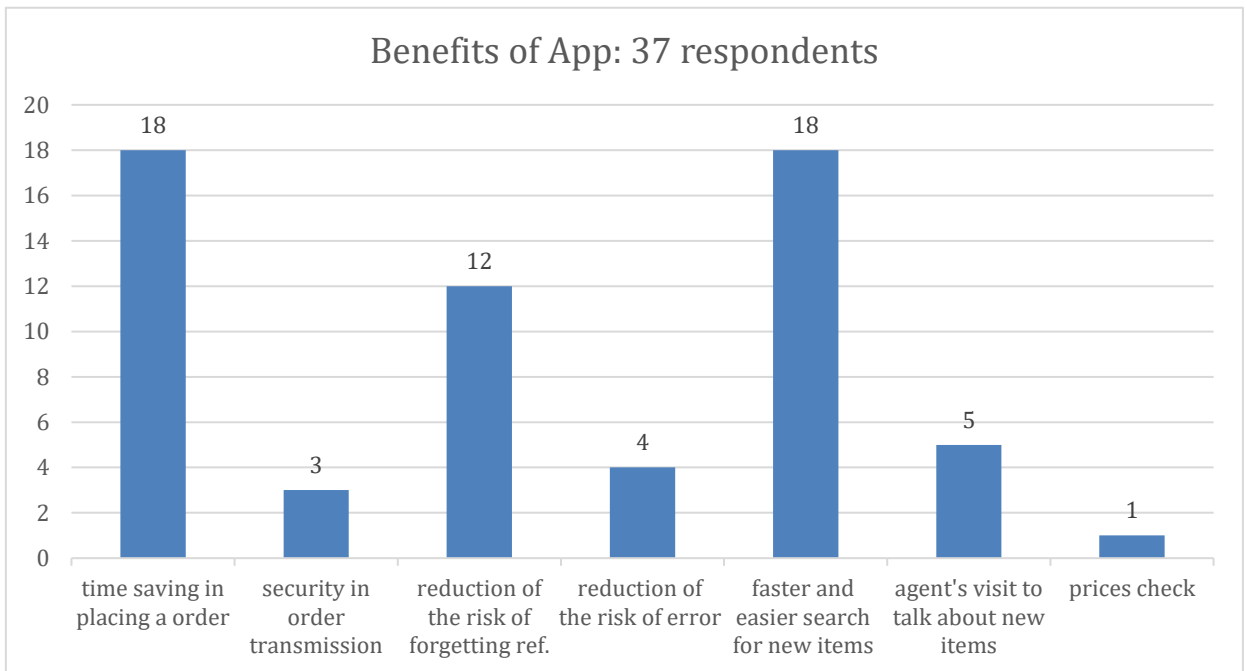
Figure 10a: Breakdown by access per week
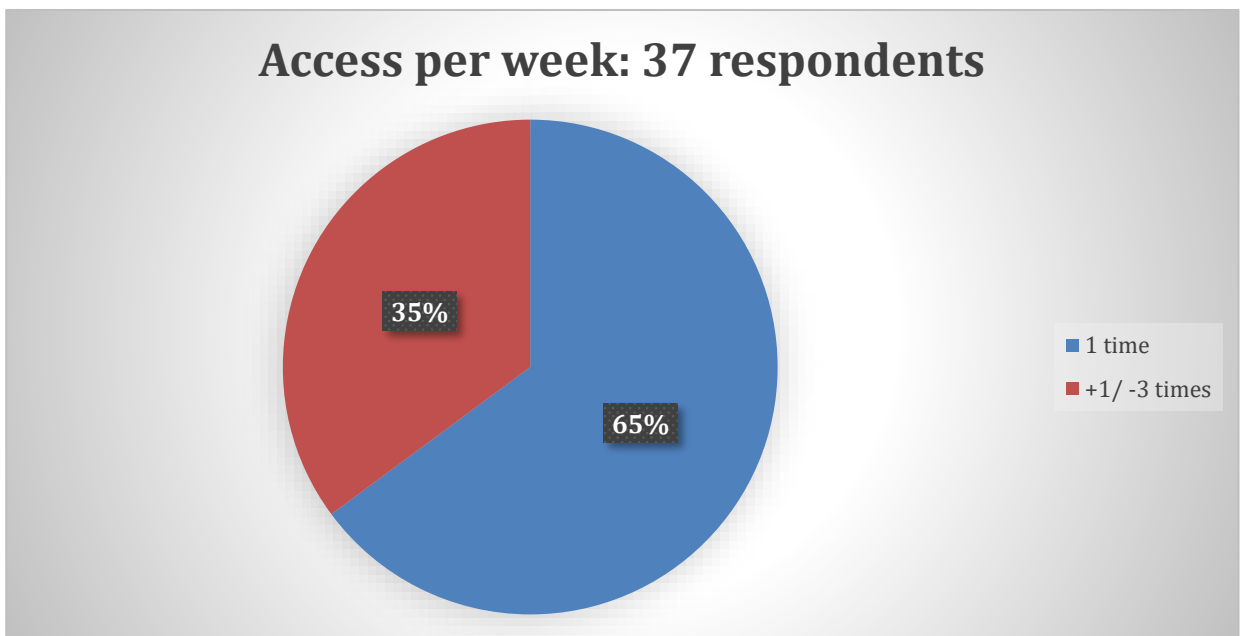
Figure 11a: Breakdown by receiving App notifications

Notification from the App: 37 respondents

- yes — 49%
- no — 51%
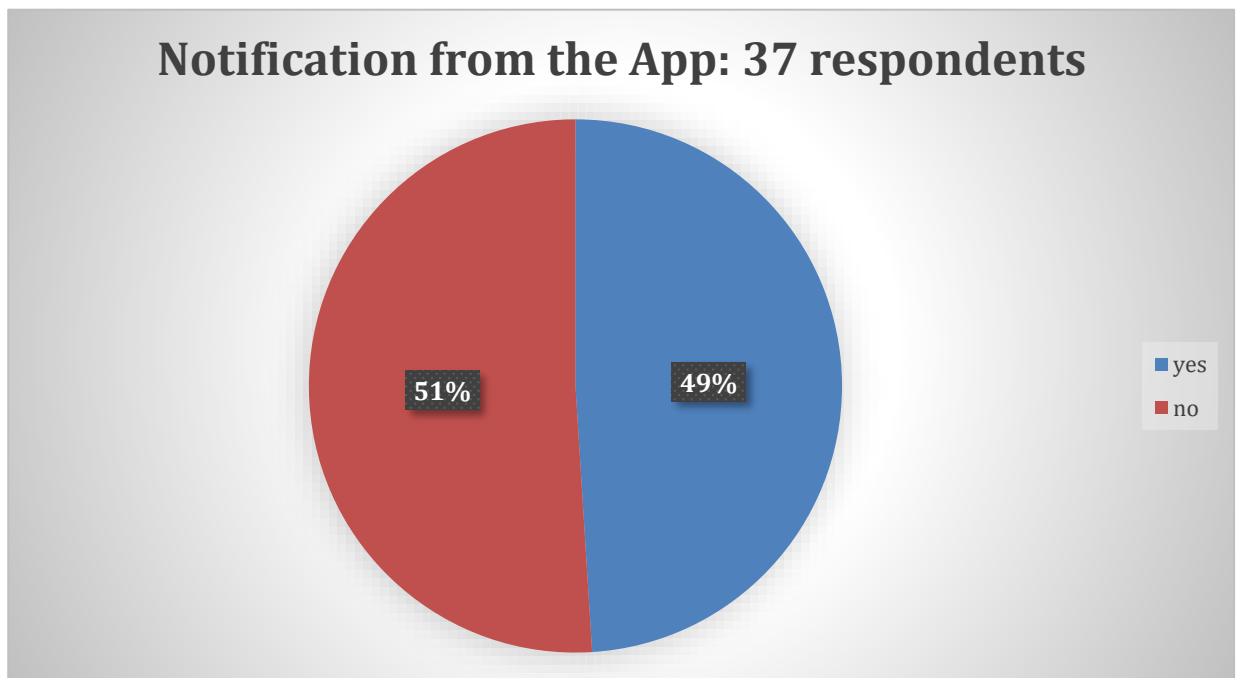
Figure 12a: Breakdown by App access after notification

App access after notification: 18 respondents

- always — 28%
- often — 33%
- sometimes — 33%
- never — 6%
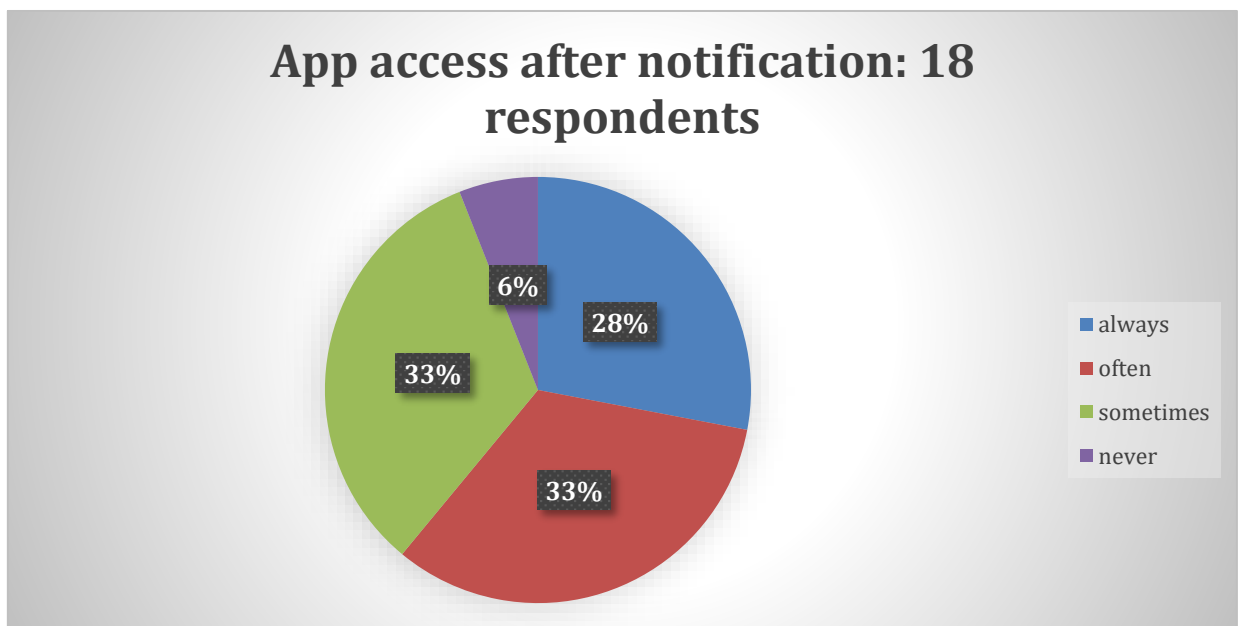
Figure 13a: Breakdown by notification assessment

Assessment of notifications: 18 respondents

- very useful — 17%
- useful — 56%
- quite useful — 17%
- intrusive — 10%
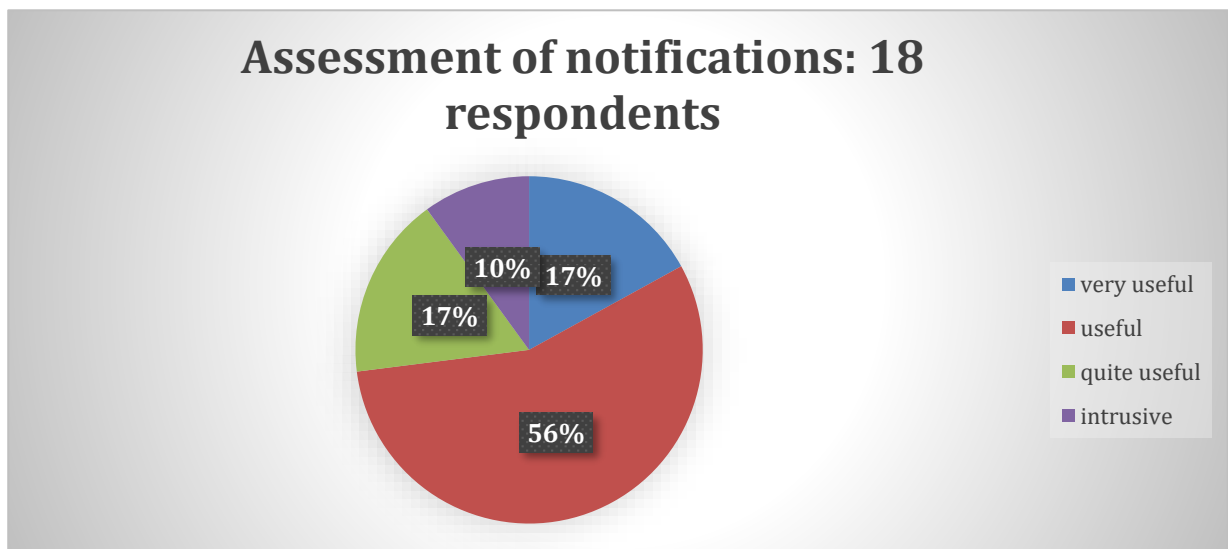
Valsana App has been downloaded and used at least 1 time by less than 50% of the customers surveyed (47%) and, the absolute majority of them find it simple to use (84%: 54% find it very simple and 30% find it simple). A very large proportion of customers, however, raise the issue of lack of training (49% of respondents), which is combined with underperforming and incomplete training (32% say they have received training only 1 time). Most customers surveyed use the App to place orders (21 out of 37); much less use is made of consulting the digital catalog (9 out of 37) and booking at regular events (8 out of 37). The most important benefits according to customers who use the App are the time saved (18 out of 37) and the speed and ease of finding new items in the catalog (18 out of 37); also certainly useful is the figure found of those who consider the App useful for reducing the risks of forgetting products during the ordering process (12 out of 37). Most customers surveyed access the App 1 time per week (65%). Notifications are received and viewed by 49% of respondents.

Only 10% of those who receive notifications rate them as intrusive, while 73% find them useful or very useful.
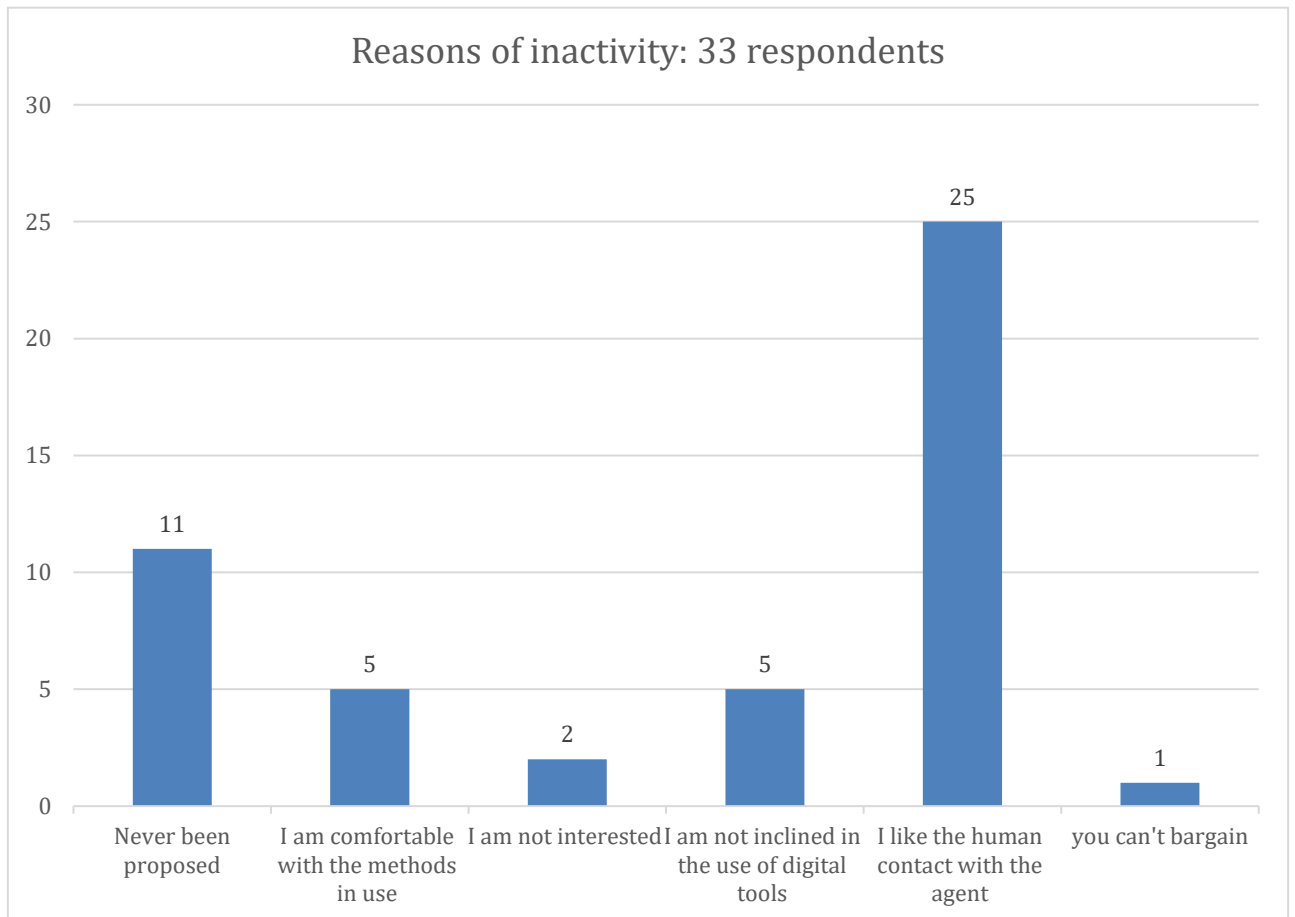
Figure 5b: Preferences expressed of inactivity reasons

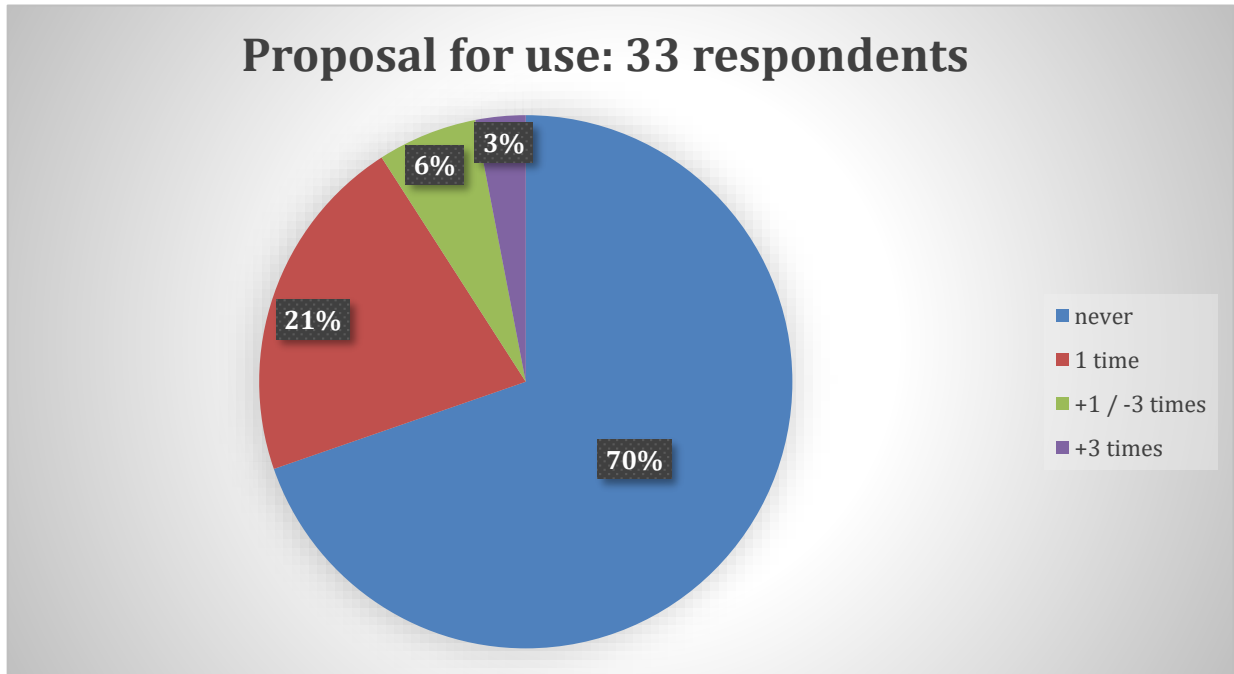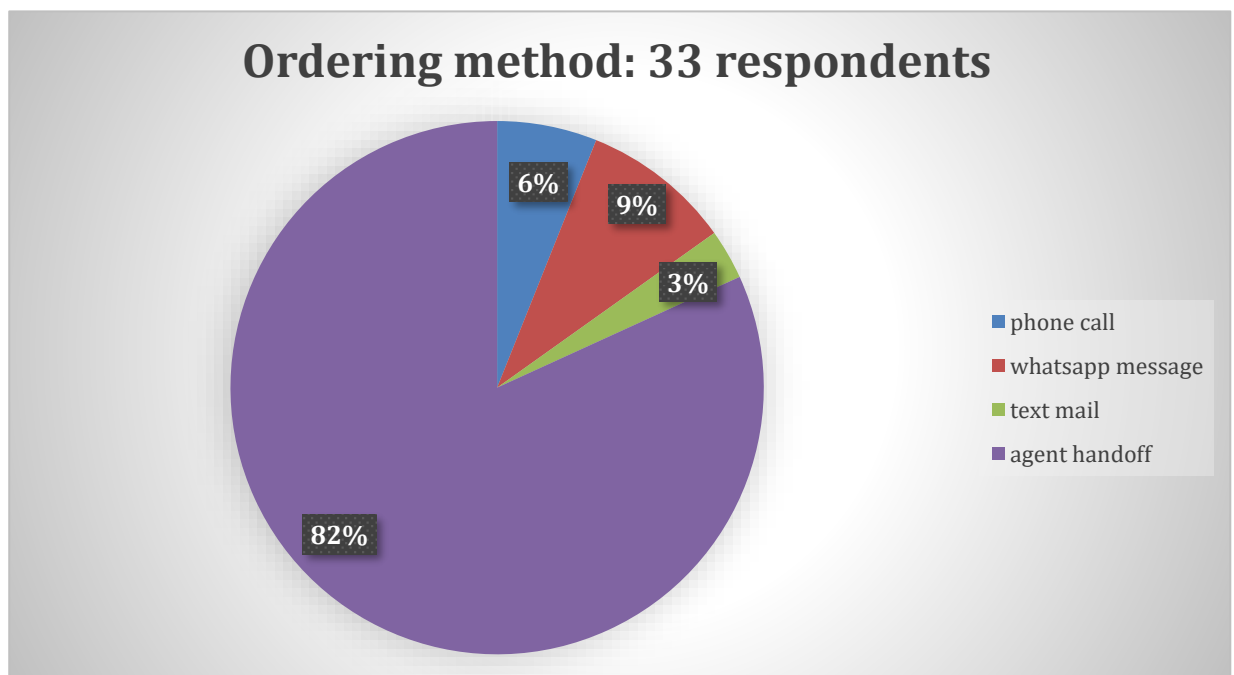Figure 6b: Breakdown by proposal for use received

Proposal for use: 33 respondents

- never
- 1 time
- +1 / -3 times
- +3 times

3%
6%
21%
70%

Figure 7b: Breakdown by ordering method

Ordering method: 33 respondents

- phone call
- whatsapp message
- text mail
- agent handoff

6%
9%
3%
82%

Among the customers who do not use the App emerges as the main motivation the pleasure of human contact with the agent and the disinterest of replacing human work with digital work (25 out of 33) well distanced but relevant is the preference expressed with respect to the lack of proposal and training of use of the App by the agent (11 out of 33); the latter figure is supported by 70% of responses confirming the absence of the information related to the App and its use by the agent. The absolute majority of customers use direct agent handover (82%) as their ordering methodology, well preferring it over phone call (6%) whatsapp message (9%) and email (3%).

Figure 14: Breakdown by Amazon App use

Amazon App use: 70 respondents

- yes
- no

30%

70%
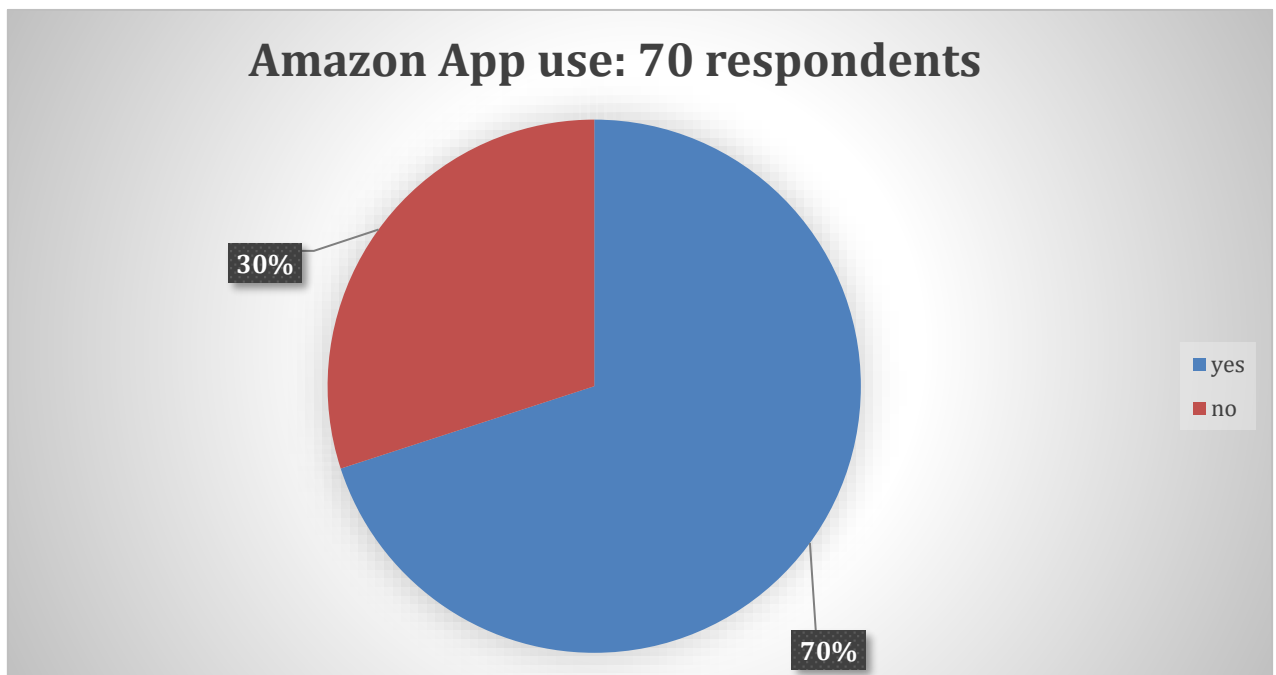
Figure 15: Breakdown by Amazon App degree of difficulty of use

Amazon's ease of use: 49 respondents

100%

- easy
- difficult
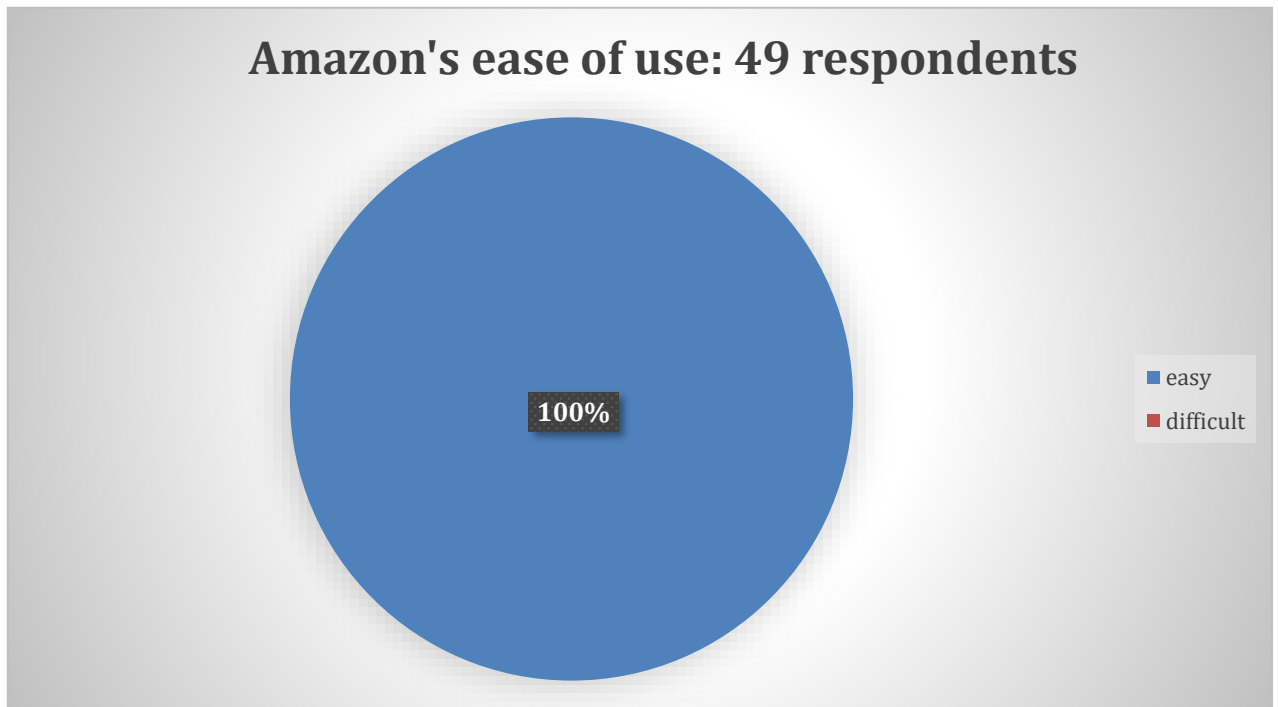
Figure 16: Preferences expressed of ease of use

Amazon vs Valsana App: 35 respondents
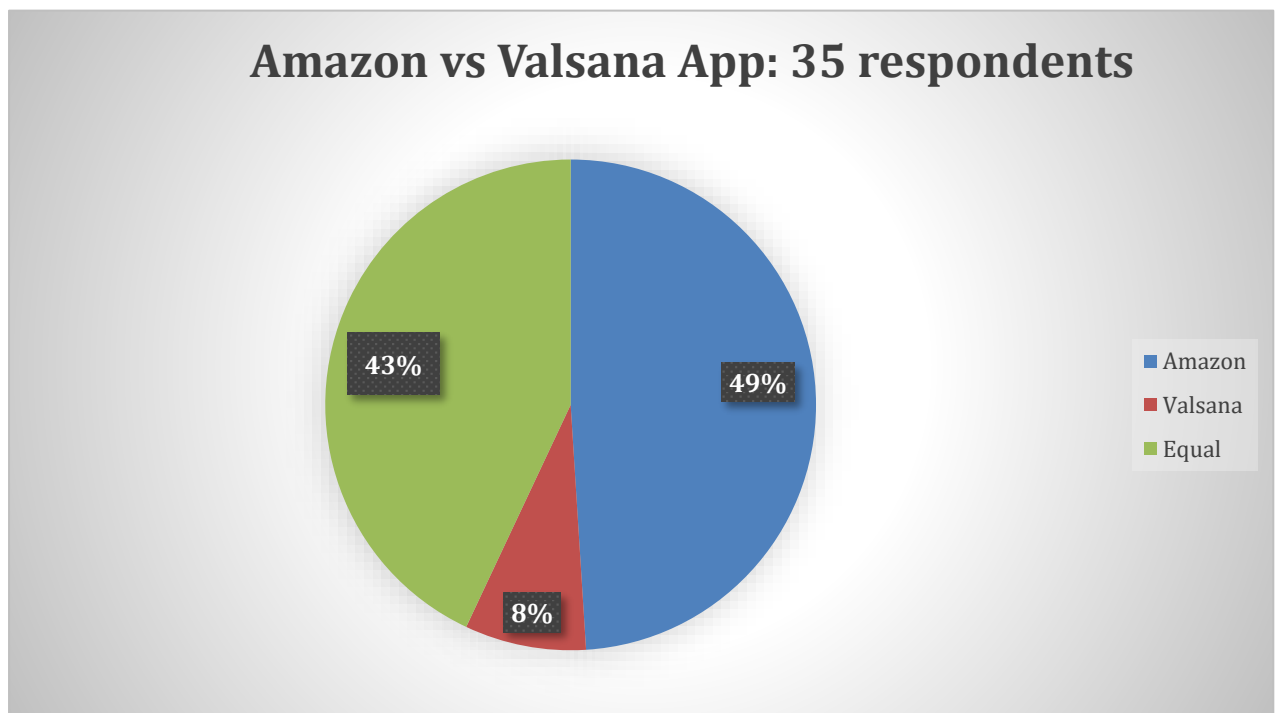
43%

49%

8%

- Amazon
- Valsana
- Equal

Figure 17: Indication of Amazon strengths:

1. Product comparison and similar product suggestion;
2. reminder of what you have recently visited;
3. delivery speed.

Figure 18: Breakdown by other BtoB purchases App utilization

Other BtoB purchases App: 70 respondents

24%

76%

■ yes
■ no
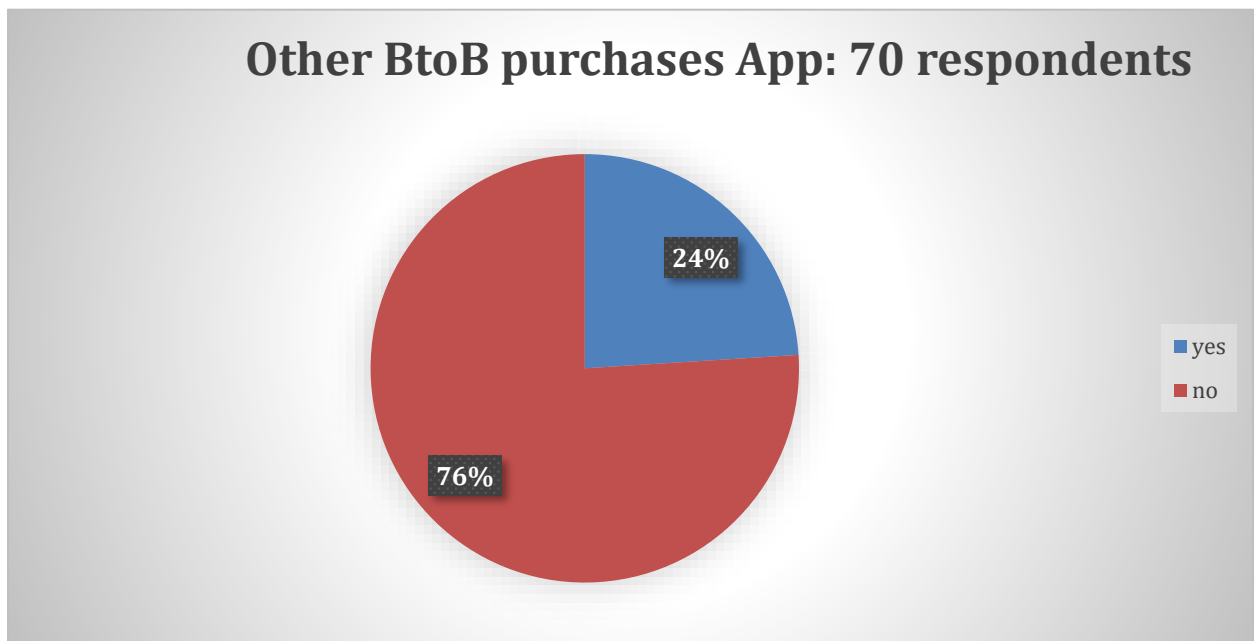
Figure 19: Breakdown by amount of other BtoB purchases used

Other BtoB purchases App: 17 respondents

- 24%
- 76%

Legend: ■ 1   ■ +1-3
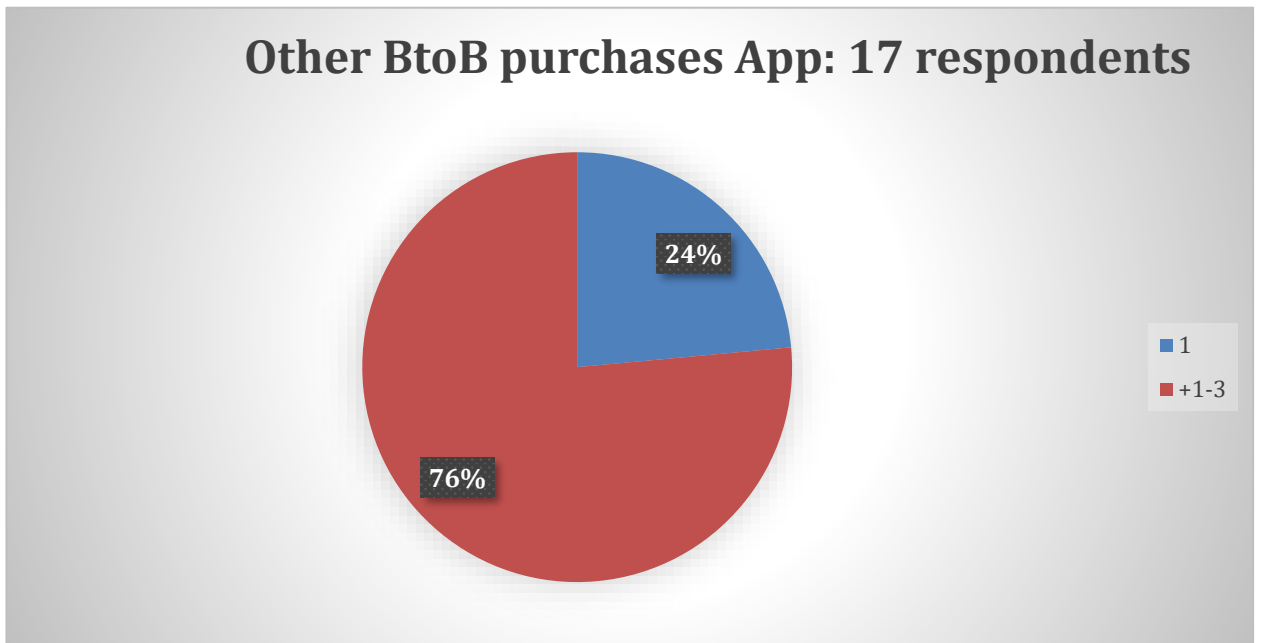
Figure 20: List of other BtoB purchases used from Valsana customers

1. Magafoodlab
2. Crack
3. Manes
4. Metro
5. Ecornaturasi
6. Anticamente
7. Mr.Malt

8. Tannico
9. Marr
10. BiotoBio
11. Granarolo
12. De Magi
13. Soplaya

Figure 21: Breakdown by using shopping Apps on the job

Grocery purchases by digital applications: 37 respondents

- -10%
- +10%-30%
- +30%-50%
- +50%

5% 0% 1%

94%
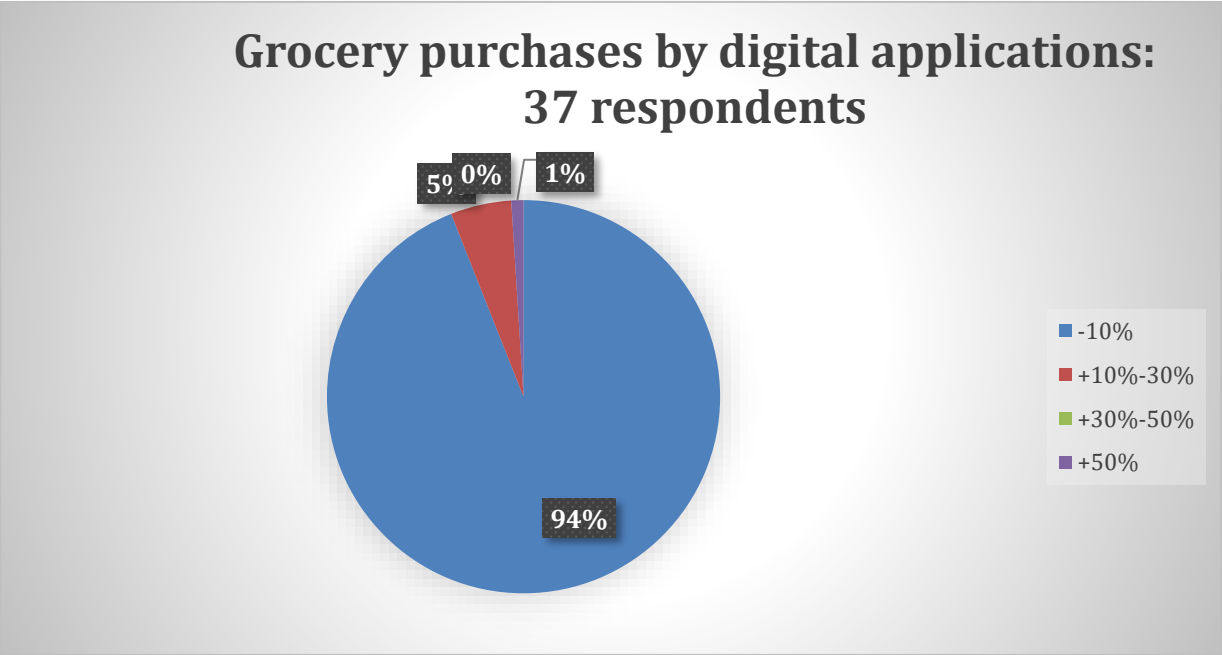
Figure 22: Breakdown by using grocery shopping apps on the job

Purchases by digital applications: 37 respondents

- -10%
- +10%-30%
- +30%-50%
- +50%

5% 0% 1%

94%
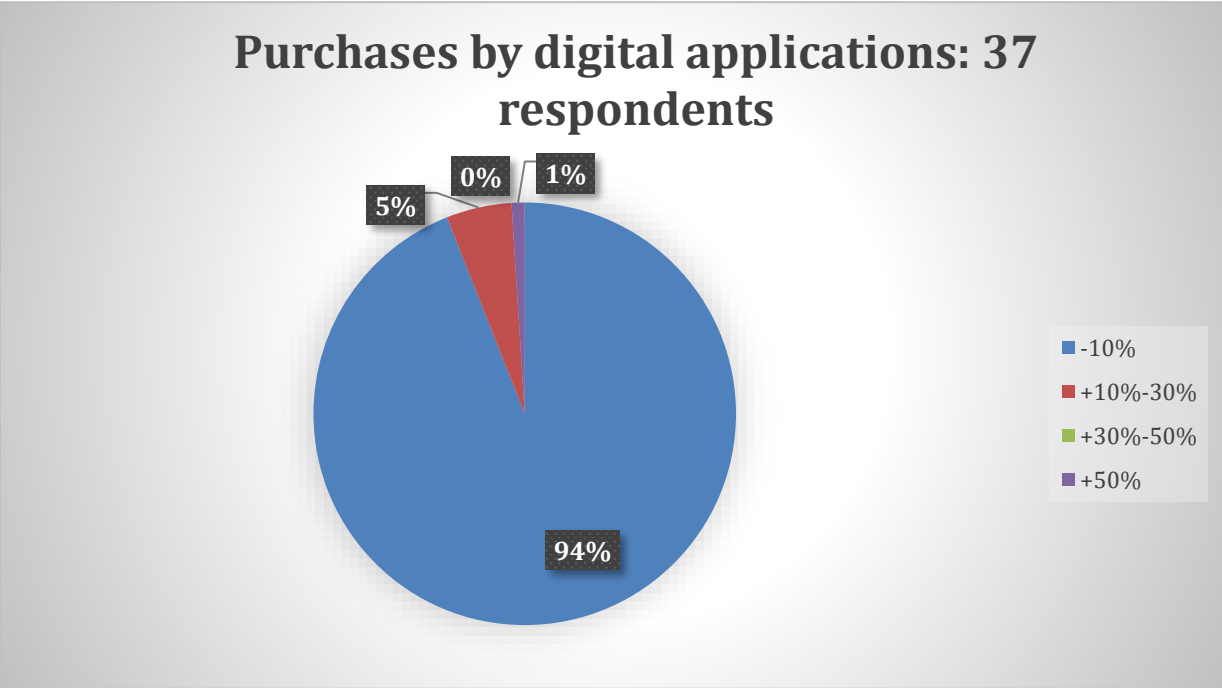
No one responded describing improved elements to apply to the Valsana App considering the other purchasing apps it uses.

Figure 23: List of improvements for the App

1. Make it easier opening product sheets of digital catalog;
2. reporting the unavailability of products;
3. improve ordering flow (if you order recurring products and then access the general catalog, you lose products already reserved);
4. possibility to delete items (no longer purchased) from historical catalog;
5. app notification does not anticipate the topic being covered;
6. the manufacturer's name is often missing within the digital catalog;
7. merge the selection when ordering from historical catalog and new product search.

70% of respondents use the Amazon App and 100% of them find it easy to use; among Valsana App users, 49% find Amazon easier and more intuitive than the Valsana App while as many as 43% find the two Apps equally easy. 8% even consider the Valsana App easier than the Amazon App. The three most important elements of Amazon, according to the customers surveyed are: product comparison and similar product suggestion; reminder of what you have recently visited; delivery speed. Only 24% of respondents use other Apps to place online orders and 24% of them use only one other App besides the Valsana App. The absolute majority say they purchase their supplies in general and specifically food supplies for less than 10% of the total value through online platforms (94%).

Figure 24: Preferences expressed of elements to get started with V.App

Useful elements to get started with the App: 33 respondents

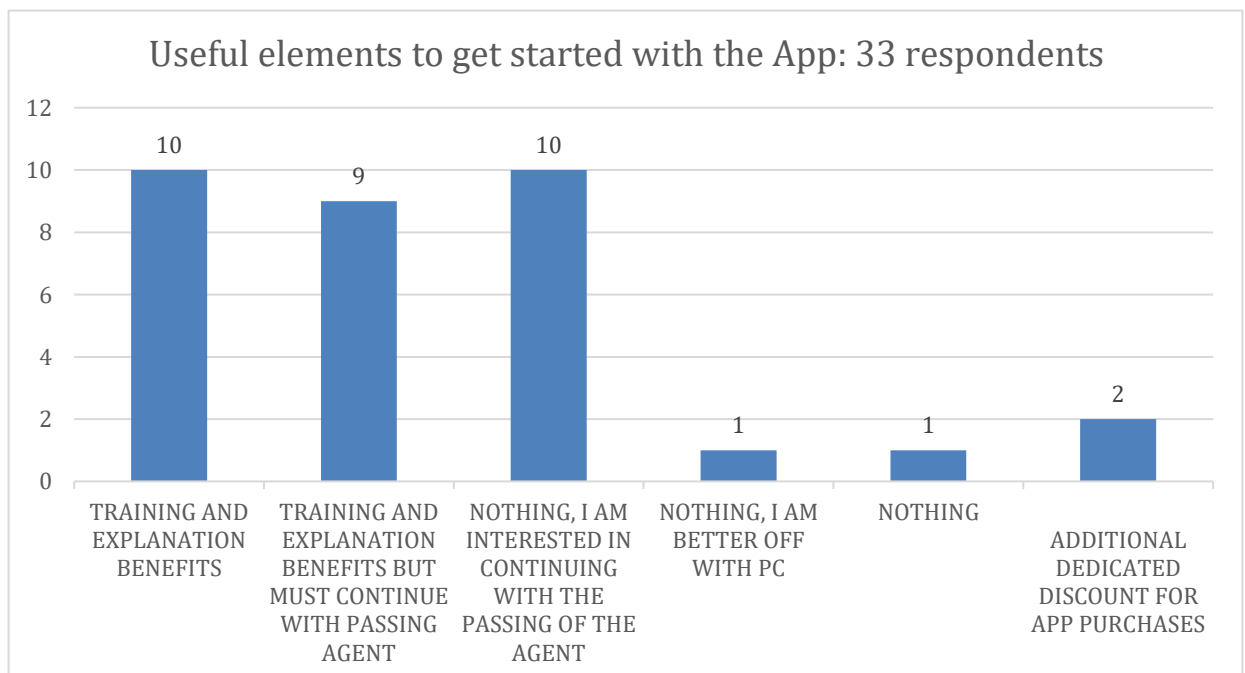| Category	Value
TRAINING AND EXPLANATION BENEFITS	10
TRAINING AND EXPLANATION BENEFITS BUT MUST CONTINUE WITH PASSING AGENT	9
NOTHING, I AM INTERESTED IN CONTINUING WITH THE PASSING OF THE AGENT	10
NOTHING, I AM BETTER OFF WITH PC	1
NOTHING	1
ADDITIONAL DEDICATED DISCOUNT FOR APP PURCHASES	2

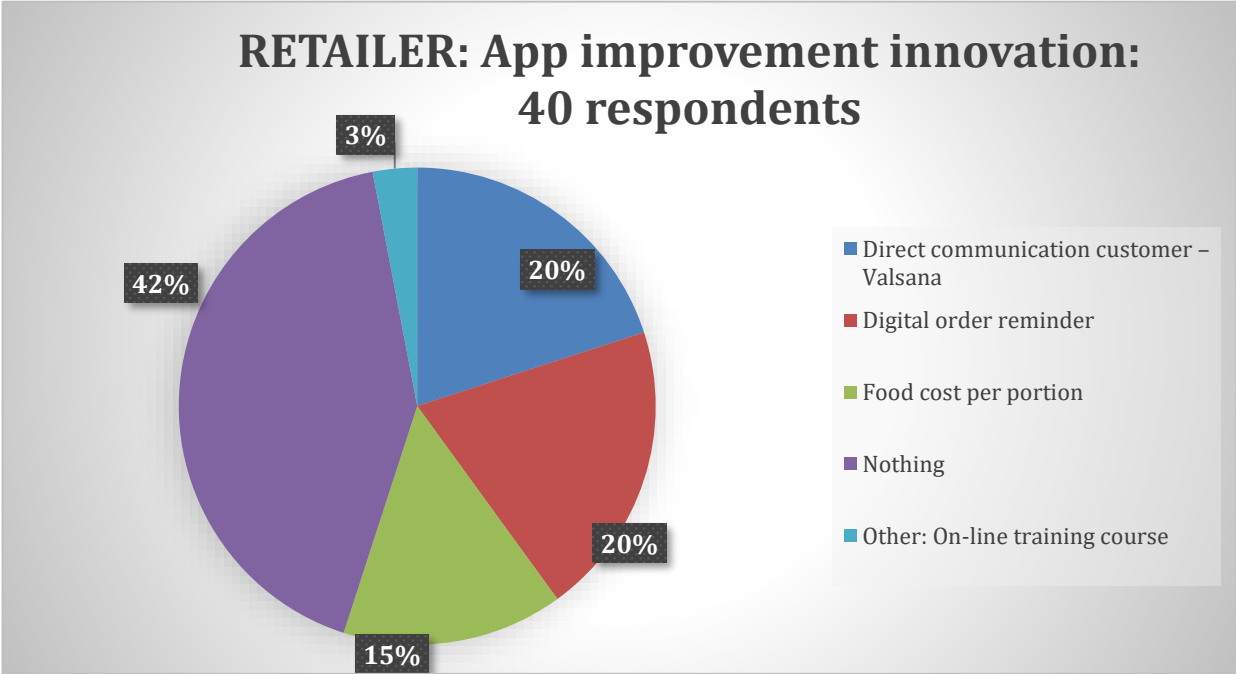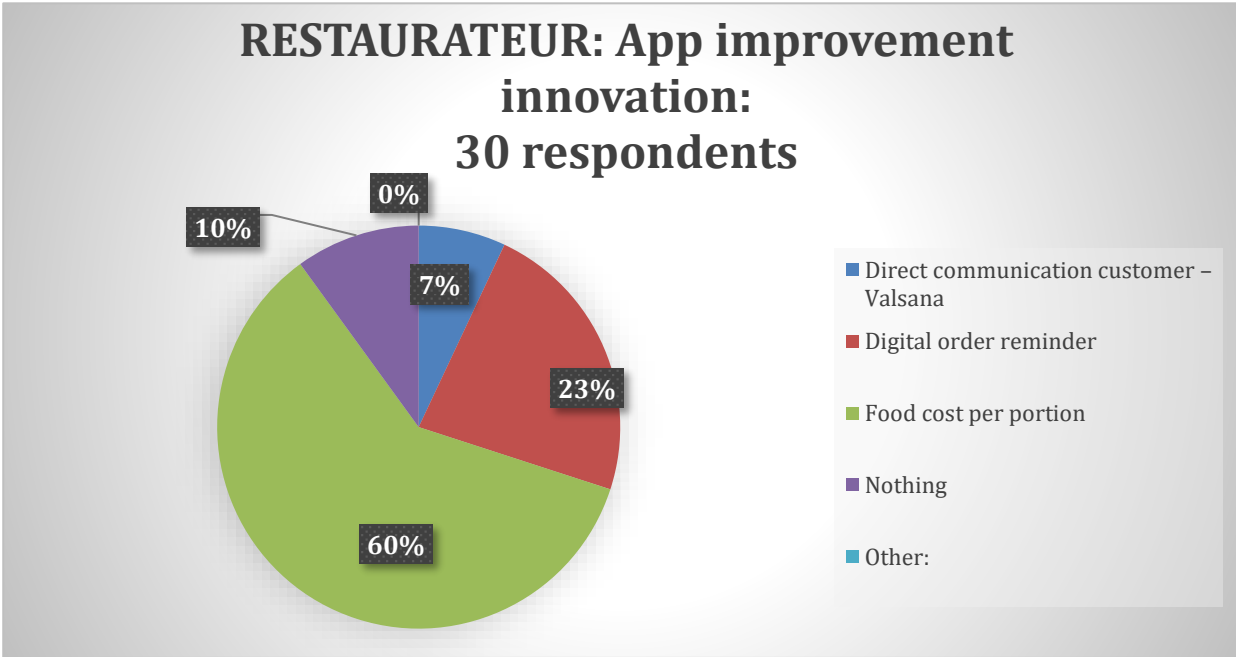Figure 25: Breakdown by improvement innovation for retailer

Figure 26: Breakdown by improvement innovation for restaurateur

For customers who have not yet started using the App, the agent contribution is relevant. 19 out of 33 consider it essential the visit of the agent to place orders, receive information and support by him but 9 of these, however, open to the possibility of receiving training and explanations such that there can be a start of using the App however accompanied by the agent's visit. 10 out of 33, on the other hand, indicate training as an essential element in understanding the potential of the tool then evaluating the opportunity to use it. With respect to the opportunities for improvement and implementation of the App, retailers for the most part (42%) do not express particular needs, 20% instead are interested in the introduction of digital order reminder and, the other 20% in direct customer-Valsana communication; restaurateurs on the other hand are absolutely interested in food cost per portion (60%) and they too in digital order reminder (23%).

As set forth above, following the one-variable analyses: uni-variate relationship, it was decided to relate a number of variables that, influenced by the same aspect, assume similar or opposite behaviors. In addition, it was tried to cross-reference identifying elements of the interviewees with some detected business behaviors and working methods in order to delve into what may actually be the opportunities for growth of the project depending on the different professional situations and the different types of subjects representing Valsana customers today.

Figure 28: Relation between age of customer and App use:
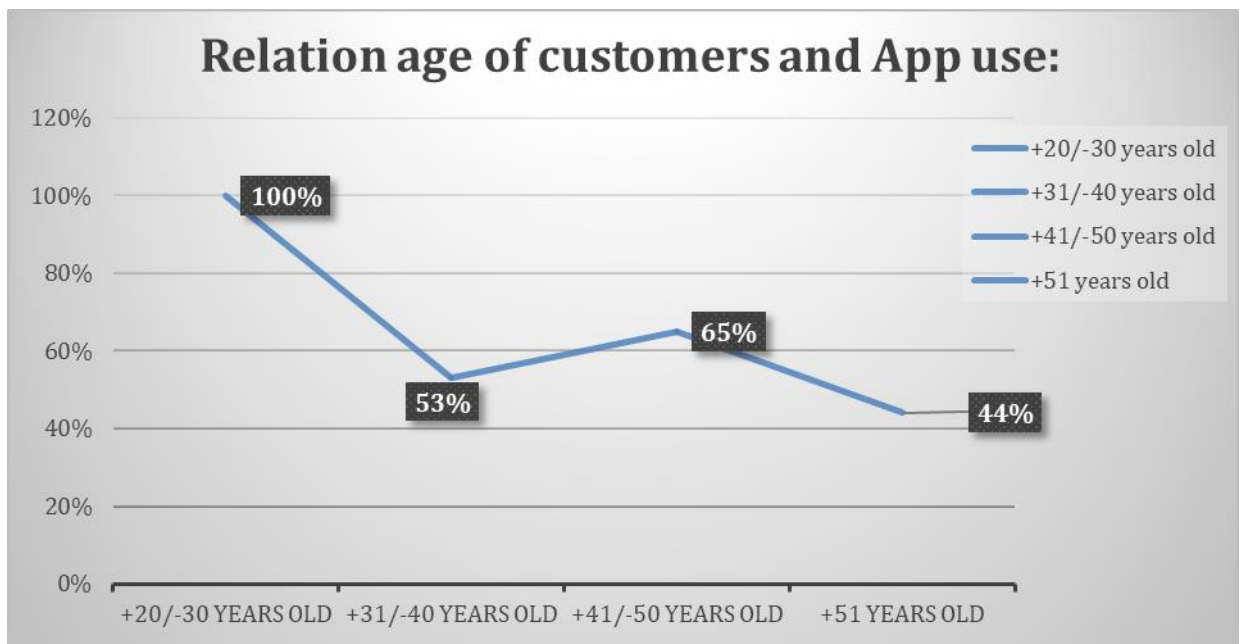
The graph shows that, as age increases, the use of the digital App decreases although, in the 41/50 bracket there is a 12 percentage point increase in use compared to the 31/40 bracket; the figure is certainly interesting and worth noting and is supported by the interviews carried out in which this bracket of customers (41/50) nevertheless showed

themselves to be attentive and oriented to the digital opportunities
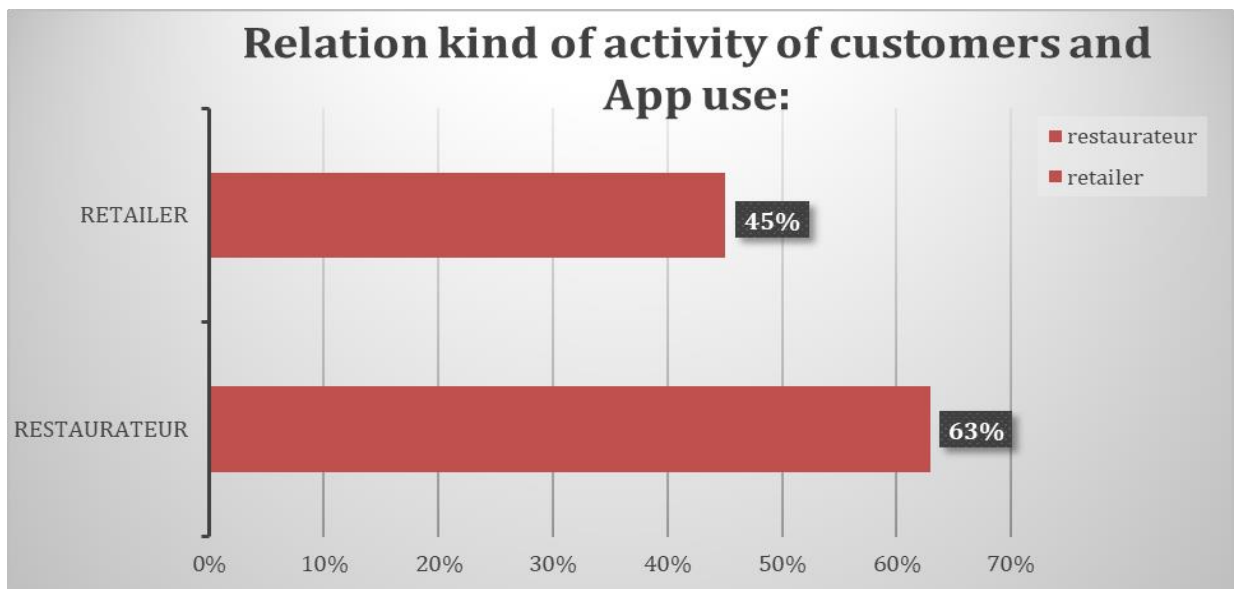proposed.

Figure 29: Relation between educational classification of customers and
App use:
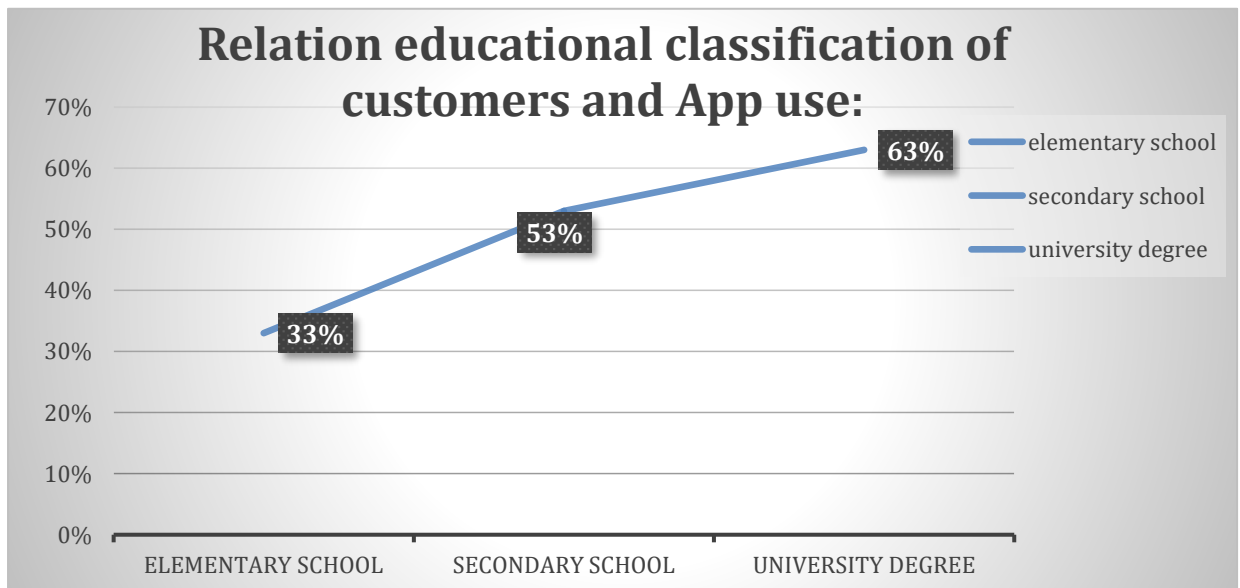
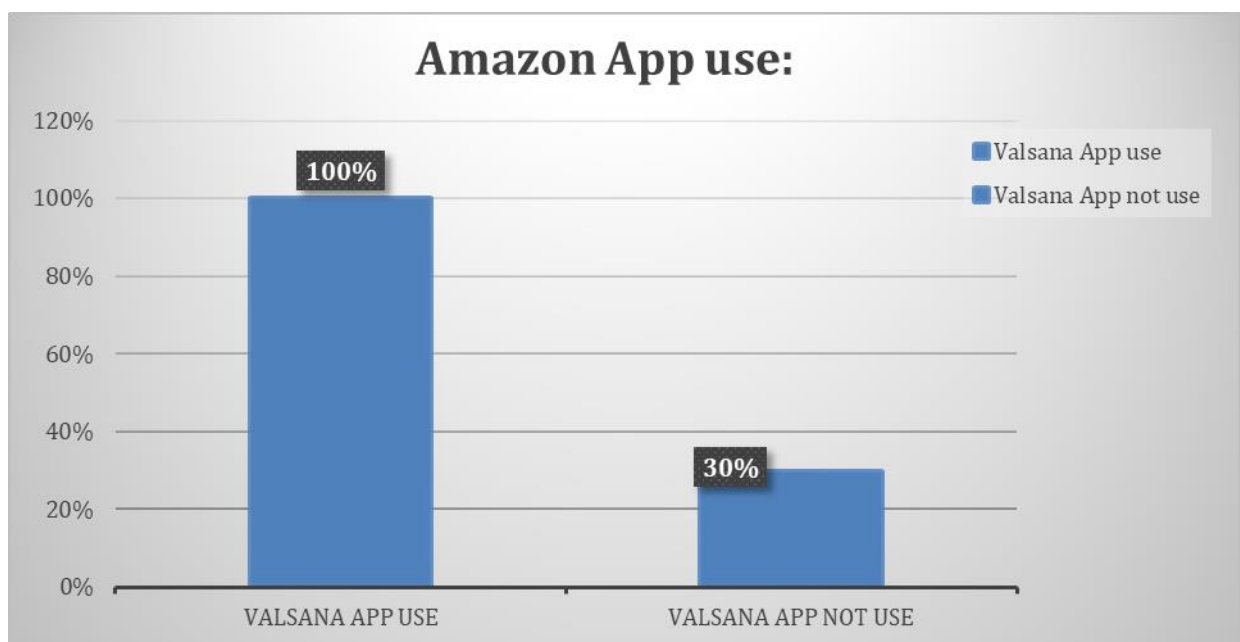The graph shows that as school education increases, the use of the App
grows.

Figure 30: Relation between kind of activity of customers and App use:

The graph shows that the use of the App is higher by restaurateurs (63%) than by retailers (45%).

Figure 31: Relation between use of Valsana App and Amazon App

The graph shows the relationship between the use of the Amazon App and the Valsana App. All users of the Valsana App also use the Amazon App (100%), while only 30% of non-users of Valsana App use the Amazon App (customers who are naturally disinclined to go digital and difficult to convert).

Figure 32: Comparison of the app's benefits between customers who use it in general and customers who use App to place orders.
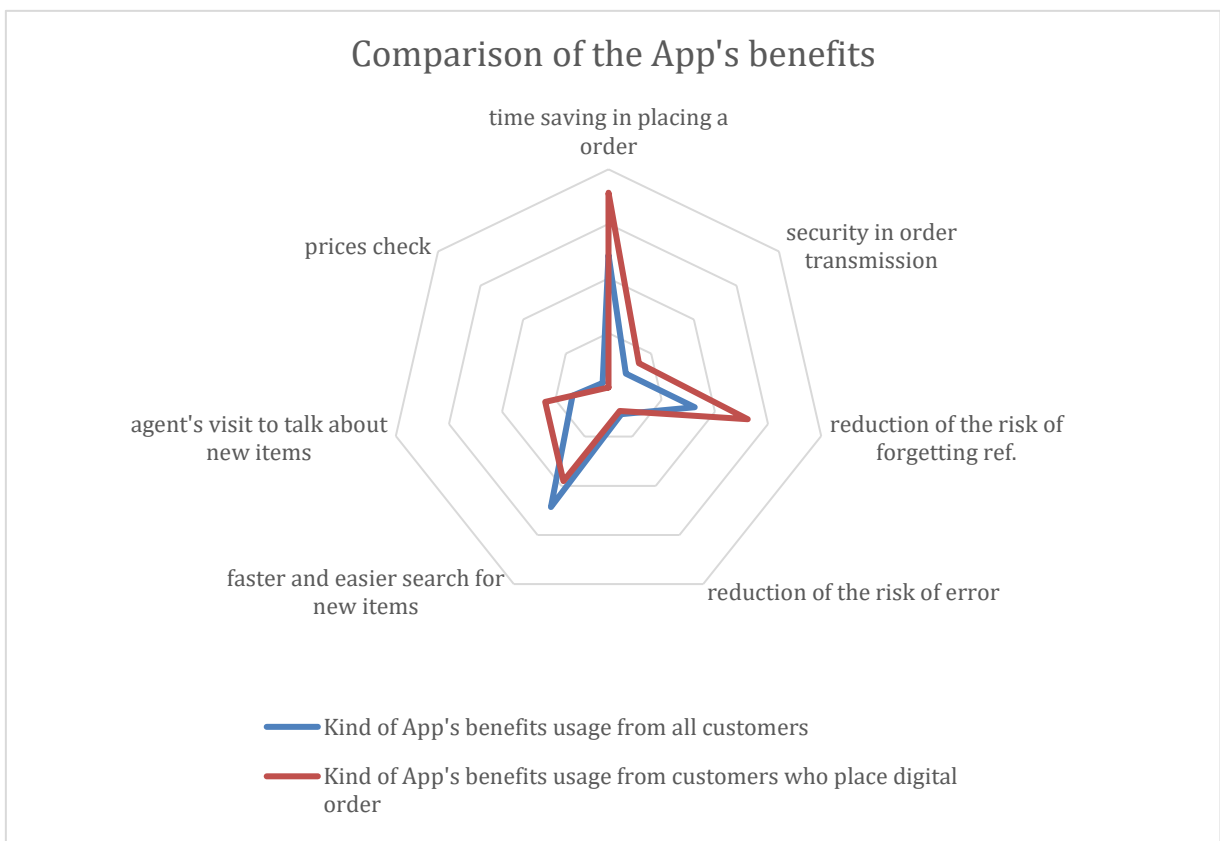
The graph shows the comparison of indications of the App benefits by respondents who use the App and all respondents (including non-users). It clearly emerges that there is a marked similarity where, prevailing for those who use it, is the indication of saving time and reducing the risk of

forgetting products in orders while, for the totality of respondents, the speed in finding the catalog news is the most important edge that is provided by App. For those who use the App there is an indication of benefit more related to the operational phase while the totality of respondents focus more on the benefit related to the cognitive and exploratory part.

CONCLUSIONS

We are within a period of epochal change where, the correct analysis of the existing situation and customers' needs, can lead to a much faster development of new technologies and related digital tools. From the analysis carried out of Valsana's customers, 51% of them are over 51 years old; the App usage figure (which includes all those who have downloaded the Valsana App), is certainly good but compared with the data collected from the Valsana management system, it emerges that only 30% use the App more or less frequently. By many customers, the tool is considered easy to use both viewed individually and compared with the Amazon App (used as a usability benchmark), and this has considerable value as there is no barrier given by the difficulty of use. A weak point, on the other hand, is the lack of training or isolated to a single, sterile event (49% no training and 32% training done only once) and this is likely a consequence of weak or non-continuous structural training organized by the distribution company towards both its agents and its customers (it should be noted that the project is currently in its early stages and not yet 1 year old). Intra-company figures have also not been identified for the purpose of conducting training to both stakeholders (agents and customers), and this is a important point to dwell on based on the responses obtained on the questionnaire; customers confirm that the App is mainly used to place orders (21/37 respondents) and the tool helps to speed up the time to search for products, news and offers (18/37 respondents) and to complete the order (18/37 respondents) but, at the same time, there is a strong demand from them to ensure the periodic presence of the agent as a real

friendly figure as well as a professional service and support; this link is evident and also emerges from the comments of the agents who consider the direct visit and the live interview with the customer to be very important; this aspect keeps the relationship strong and minimizes the risk that the customer may turn to other suppliers since the physical presence is guaranteed on a regular basis. In fact, from the data, it is found that 25 out of 33 respondents want there to be human contact and consider it the main reason for not using the App; in second place among the reasons for not using the App though detached in an important way, with 11 out of 33 responses there is the agent's failure to propose the use and explanation of the App. Even the ordering method with 82% of preferences assigned, unequivocally confirms, the presence of the agent at the time of ordering. The data collected, however, on the use of Amazon (70% of respondents use the Amazon App for their purchases) and the very positive result on the ease of use of the Valsana App compared to the Amazon App model (8% of respondents consider the Valsana App better than the Amazon App and 43% consider the two Apps on par) makes us understand here again that the customer, despite the high average age, is not so far from the digital world; this assessment is also supported by the data obtained on the reasons for not using the Valsana App; in fact, it emerges that only 5 out of 33 respondents prefer the order method currently in use, 2 out of 33 respondents state that they are not interested in the digital tool and 5 out of 33 customers state that they are not predisposed and able to use digital tools; overall, only 12 out of 33 respondents deny an openness to the digital order approach. The data on the use of other digital Apps is also very weak, only 24% of

customers say that they use at least 1 other App (or vendor site with BtoB e-commerce) for their business-related purchases; this allows us to identify the historical period in which we are living confirm what was said earlier: it is the initial phase of a great period of change on the topic of digitalization. Although the conversion process will certainly be long and complex, however, the data collected testify to how much the Valsana company is a pioneer in this innovation process: 30 percent of customers Valsana uses the App more or less continuously, and this figure is far higher than the 24 percent reported above of Valsana customers who use other Apps for purchases related to their business. Returning to the point that is considered central to being able to address the critical issues of developing the adoption of the Valsana App, the data in question 25 are obvious and easy to interpret: 19 out of 33 respondents require dedicated training with an explanation of the benefits of the App so that they can initiate its use but 9 of them emphasize that even initiating the adoption of the App they want the agent to continue his visits to them. At this point it is fair to ask if on the one hand the customer opens up to listening and the possibility of starting to use the digital tool to place their orders, on the other hand what role would a professional figure such as the agent whose activity of collecting orders on site would be eliminated and, in its place would be expanded the entertainment and support activities to date carried out very quickly and inefficiently? This new digital age, which is leading to streamlining operational time, merging procedures and activities into unified software and optimizing logistical movements, is redefining the figure of the agent by replacing the figure of order collector with a more elevated and trained figure who performs

the most comprehensive advisory possible to the customer both in terms of the product and aspects of managing the sales or catering business. Will supplier companies be able to count on trained figures whose purpose will be to support their customers on the one hand and develop cross-selling and up-selling activities on the other? And in this path, in order not to destabilize the client and to allow a smooth transition to a new style and method of work, the one who will have to present the design of the App and train the client on its use and on understanding how best to use it to make the most of the services and facilities it provides, could be a professional figure trained and dedicated by the company with the purpose of training both the agent and the client, making them participating actors of the project and evolutionary process and who will support and protect them in order that both parties can express themselves at their best and bind themselves even more to the company Valsana srl?

ANNEX 1

AGENTS QUESTIONNAIRE

Question 1: Do you know Valsana srl App?

    a) Yes

    b) No

Question 2: Have you had training in learning the instrument? If yes, how many times?

    a) No

    b) 1 time

    c) 2+ / 5 times

    d) +5 times

Question 3: Do you think it more useful for you or for your client?

    a) Agent

    b) Customer

Question 4: Do you think the adoption of the Valsana app may have contraindications for you (agent)? If so, which ones?

    a) Yes

    b) No

Question 5: Do you think the adoption of the Valsana app may have contraindications for your customers? If so, which ones?

    a) Yes

b) no

Question 6: How many of your customers regularly use the Valsana app to place orders?

a) – 10%
b) 10% / 30%
c) +30% / 50%
d) +50%

Question 7: How often do you train each client?

a) 1 time
b) 1+ / 3 times
c) 3+ / 5 times
d) 5+ times

Question 8: What do you think is the most important block in your customers' use of the APP?

a) Disinformation
b) Culture
c) Acquired work style
d) Little digital inclination
e) Customer's interest in maintaining human contact
f) Lack of an economic incentive

Question 9: Do the economic promotions active in the APP for customers turn out to be decisive in stimulating the use of the APP?

a) Yes

b) No

Question 10: What other incentive could be more effective in your opinion?

Question 11: Select the strengths you think are valuable for your work with the app:

a) Time saving

b) Use of time gained for visiting new customers

c) Ease and immediacy of novelty presentation

d) Use of time gained for presenting new products, proposals, ideas and events and not collecting orders

e) Use of time gained to strengthen friendship and complicity with the customer

f) Reduced risk of making transcription errors or forgetting references in order entry

Question 12: Describe other strengths for your work with the app.

Question 13: Select the strengths you think are valuable for your customers work with the app:

a) Time Savings

b) Security in order transmission

c) Reduced risk of forgetting references, thanks to the list of products already purchased

d) Reduced risk of error in references, thanks to direct order entry

e) Faster and easier search for new items

f) Use of time gained to talk about new products and ways of using the product

g) Use of earned time to talk about personal issues that help agent-customer bonding

Question 14: Describe other strengths for your customers work with the app.

ANNEX 2

CUSTOMERS QUESTIONNAIRE

Question 1: How old are you?

   a) 20 – 30 years old

   b) 31 – 40 years old

   c) 41 – 50 years old

   d) + 51 years old

Question 2: What is your educational qualification?

   a) Elementary school

   b) Secondary school

   c) University degree

Question 3: What kind of activity do you have?

   a) Food Retailer

   b) Restaurateur

Question 4: Where is located your activity?

   a) Town +20k citizens

   b) Town -20k citizens

   c) Suburb +20k citizens

   d) Suburb -20k citizens

Question 5a: Do you use Valsana App?

    a) Yes

    b) No

Question 6a: If you use Valsana App, how easy is Valsana App to use?

    a) Difficult

    b) Normal

    c) Easy

    d) Very easy

Question 7a: If you use Valsana App, have you received training from Valsana staff?

    a) No

    b) 1 time

    c) 1+ / 3 times

    d) 3+ times

Question 8a: If you use Valsana App, what do you mainly use it for?

    a) Catalog consultation

    b) News consultation

    c) Ordering

    d) Event booking

    e) Downloading DDT and invoices

Question 9a: If you use Valsana App, what is the biggest benefit the App provides you?

a) Time Saving in placing a order
b) Security in order transmission
c) Reduction of the risk of forgetting references
d) Reduction of the risk of error
e) Faster and easier search for new items
f) Agent's visit to talk about new items
g) Other

Question 10a: If you use Valsana App, how many times do you access per week?

a) 1 time
b) 1+ / 3 times
c) 3+ / 5 times
d) 5+ times

Question 11a: If you use Valsana App, do you receive notifications from the App?

a) Yes
b) No

Question 12a: If you use Valsana App, when do you receive notifications consult/access the app?

a) Always
b) Often

c) Sometimes

d) Never

Question 13a: If you use Valsana App, how do you rate the App's notifications?

a) Very useful

b) Useful

c) Quite useful

d) Intrusive

Question 5b: If you don't use Valsana App, why don't you use it?

a) Never been proposed

b) I am comfortable with the methods in use

c) I am not interested

d) I am not inclined in the use of digital tools

e) I like the human contact with the agent

f) Other

Question 6b: If you don't use Valsana App, how many times have you been proposed by Agent Valsana?

a) 0

b) 1

c) 1+ / 3

d) 3+

Question 7b: If you don't use Valsana App, what is the method you use to place orders with Valsana currently?

a) Phone call

b) Whatsapp message

c) Mail text

d) Agent handoff

Question 14: Do you use Amazon for your online shopping?

a) Yes

b) No

Question 15: If you use Amazon App, do you think is it easy to utilize?

a) Yes

b) No

Question 16: If you use Amazon and Valsana App, do you think it's easier Amazon app, Valsana app or equal?

a) Amazon

b) Valsana

c) Equal

Question 17: If you use Amazon, what is the Amazon element that you think is most useful of all?

Question 18: Do you use any other App or e-commerce btob for other purchases from suppliers?

    a) Yes

    b) No

Question 19: If yes, how many other?

    a) 1

    b) 1 + / 3

Question 20: If yes, which ones?

Question 21: How many of your BtoB purchases do you make by digital application?

    a) -10%

    b) 10% / 30%

    c) +30% / 50%

    d) +50%

Question 22: How many of your BtoB grocery purchases do you make via digital application?

    a) -10%

    b) 10% / 30%

    c) +30% / 50%

    d) +50%

Question 23: What useful elements of other app would you integrate into the Valsana App?

Question 24: If you use Valsana App, are there any changes you would recommend?

Question 25: If you don't use Valsana app, what might convince you to use the Valsana App?

Question 26: Select which of the following tools you think would be useful in improving your work as a restaurateur/retailer:

a) Direct communication customer – Valsana
b) Digital order reminder
c) Food cost per portion
d) Nothing
e) Other

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