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THE ITALIAN FOOD MAGAZINE
BUYER'S • GUIDE

YEAR 11 - N° 2 • FEBRUARY 2023
MANAGING DIRECTOR: ANGELO FRIGERIO

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ON DISTRIBUTION AT BIOFACH'S TRADE PRESS STAND



A bug's life

Yellow mealworms, house crickets and migratory locusts are the first species authorized by the EU for human consumption. What about the rest of the world? A snapshot of the main regulations in force, and the most consumed edible insects.

pages 12-13



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In caso di mancato recapito inviare al CMP di Milano Roserio per la restituzione al mittente previo pagamento resi.



Crisis-proof (animal) proteins

Investors' interest in vegan food is slowing. Result of a socio-economic scenario that is hitting hard on households' purchasing power and on their sustainability efforts too. And for the cell-based industry, there is one more challenge: misinformation.

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THE COMPANY

100% passion for deli meats



One Century after its foundation, Cavalier Umberto Boschi looks stronger than ever. Result of the dedication and expertise handed down for generations. And of a complete offer that has recently welcomed the brand-new Bio Line.

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Icam and the chocolate factory



The company's commitment to an all-around sustainability has been ongoing for three generations. The idea behind the project 'Cocoa Stories'. Which offers consumers a virtual insight into the bars' production process.

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SCENARIO

Bio: a new luxury?

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VEGAN 'CHEESE'

A flourishing market

page 19

PRODUCTS

The Organic Showcase

What better display than Biofach 2023 for Italian producers of bio food & beverage, champions of exports also in 2022. In these pages, plenty of products ready to hit the shelves of stores around the world.

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CENTERFOLD

Natural & organic cosmetics

The latest beauty industry's updates and interviews



Find your mission, grow your business

Purpose-led brands promise to re-shape (for better) the consumer goods industry. And yet their success depends on scale, a Bain report says.

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ZOOM

PDO Economy: a record-breaking industry

page 8



EDITORIAL

by Federica Bartesaghi

Organic and plant-based: 2023 is starting uphill

Pandemics, wars and financial crises are not good for business. Or rather, not for all businesses. Because if sectors such as food delivery, e-commerce and agri-food itself have proliferated, for others the upheavals of the last three years have been a calamity. This is the case of plant-based companies, in full expansion in 2019 but that today seem to have lost interest among investors, as we tell in the article on page 24. But plant-based food is not alone: the organic industry is in big trouble too. And the reason is easy to say: considered 'expensive' even before the inflation wave of 2022, organic food is now within the reach of fewer and fewer consumers. The signs can be seen almost everywhere in the Old Country.

In France, in October, sales marked -5% on 2021 and forecasts even predicted a -10% at the end of the year. A market where, in the previous 10 years, sales had tripled from 4 to 12 million. Not surprisingly, food inflation has reached 12%. Things are not getting better in Germany, a solid market for organic products that had been growing unchallenged for over a decade. In October 2022, sales were down by 4.1 percentage points. Here too, food prices were up by around 20%. And in Italy? The data presented by Nomisma in September show a growth in exports (+16%) but a slight decrease in household consumption (-0.8%). Sales in specialized stores, for their part, registered an 8% drop - with no doubt the distribution channel most affected by this downturn throughout Europe - to the advantage of discount retail-

ers which, oppositely, in Italy recorded a 14% growth in their organic business.

But the contraction in households' purchasing power is not the only problem the sector will have to deal with in 2023. Hence, the EU Parliament is currently facing some critical issue for the future of the industry, starting from the EU regulation on pesticides. The proposal, which aims to halve the use of pesticides in agriculture by 2030, has raised a hornet's nest and several countries, including Italy, have asked for an additional impact assessment. "We are in favor of reducing chemicals in agriculture but it must be done with criteria", the Eurodeputy Paolo De Castro said in December. "With the farmers, and not against them".

However, if there is one front on which the world of organic and natural products has secured an important victory, it is the fight against greenwashing. With a directive approved last November, the European Parliament voted in favor of the Corporate Sustainability Reporting Directive (CSRD), that will make businesses more publicly accountable by obliging them to regularly disclose information on their societal and environmental impact. There are no doubts, for organic companies 2023 is starting uphill.

And yet in tough times, optimism is a must. As the aphorist Fabrizio Caramagna teaches, one should work with the conviction that, one day, he will say: "It wasn't a hill. It was a beautiful launch pad."

Bio e plant-based: un 2023 in salita

Pandemie, guerre e crisi finanziarie non fanno bene agli affari. O meglio, non a tutti gli affari. Perché se settori come il food delivery, l'e-commerce e lo stesso agroalimentare hanno proliferato, per altri gli stravolgimenti degli ultimi tre anni sono stati un colpo di scure. È il caso dei plant-based, in piena scalata nel 2019 ma che oggi sembrano aver perso interesse agli occhi degli investitori, come raccontiamo nell'articolo a pagina 24. Ma non solo, il mondo stesso del biologico è in affanno. E la ragione è presto detta: già considerato 'caro' prima dell'inflazione, è ora un bene alla portata di sempre meno consumatori. I segnali si vedono un po' ovunque, nel Vecchio Continente. In Francia, a ottobre, le vendite segnavano -5% sul 2021 e le previsioni parlavano addirittura di un -10% a fine anno. Un mercato in cui, nei 10 anni precedenti, le vendite erano triplicate passando da 4 a 12 milioni. Non a caso, l'inflazione alimentare ha toccato il 12%. Non va meglio in Germania, mercato fino a poco fa soli-

dissimo per il biologico, che cresceva incontrastato da oltre un decennio. A ottobre 2022, le vendite registravano un -4,1%. Anche qui, il food ha subito aumenti di prezzo nell'ordine del 20%. E in Italia? I dati presentati da Nomisma lo scorso settembre mostrano una crescita delle esportazioni (+16%) ma un lieve decremento dei consumi domestici (-0,8%). Un calo di ben l'8% ha invece interessato le vendite nei negozi specializzati - senza dubbio il canale di distribuzione più colpito da questa dinamica in tutta Europa - a tutto vantaggio dei discount che invece, nel Bel Paese, registrano una crescita del 14% nel segmento bio.

Ma la contrazione del potere d'acquisto delle famiglie non è l'unico problema con cui il settore dovrà fare i conti nel 2023. Sui tavoli di Bruxelles ci sono infatti dossier molto importanti per il futuro del comparto. A cominciare dal Regolamento europeo sui pesticidi. La proposta, che mira a dimezzare l'uso di pesticidi in agricoltura entro il 2030, ha sollevato un vespaio

e diversi Paesi, tra cui l'Italia, hanno richiesto una valutazione d'impatto aggiuntiva. "Noi siamo a favore della riduzione della chimica in agricoltura ma va fatta con criterio", commentava a dicembre l'eurodeputato Paolo De Castro. "Con gli agricoltori e non contro di loro". Se c'è però un fronte su cui il mondo dei prodotti bio e naturali ha ottenuto un'importante vittoria, questo è la lotta al greenwashing. Con una direttiva approvata lo scorso novembre, il Parlamento europeo ha votato a favore della Corporate Sustainability Reporting Directive (Csrd), la direttiva che obbliga le grandi imprese a rendere pubblici, con frequenza regolare, i dati relativi al loro impatto ambientale e sociale.

Non ci sono dubbi, per le aziende del biologico il 2023 inizia in salita. Ma in momenti come questo, l'ottimismo è d'obbligo. Come l'aforista Fabrizio Caramagna insegna, bisogna lavorare con la convinzione di poter dire, un domani: "Non era una salita. Era una bellissima rampa di lancio".

Mengazzoli

Bio

Aceto Balsamico di Modena 1933 biologico

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Organic Balsamic Vinegar of Modena

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POLO DEL GUSTO (ILLY) ACQUIRES 100% OF ACHILLEA (PONTI)

Polo del Gusto expands its business network. The sub-holding of the Illy family which encloses all the activities of the f&b group, coffee excluded, signed an agreement with Ponti Holding in order to acquire 100% of Azienda Montana Achillea, the Piedmont-based company specialized in the production of organic and premium juices and fruit compotes. The Ponti family enters Polo del Gusto with a 2.5% share. Achillea's acquisition will speed up the internationalization of the brand, which is already present in the US, Korea, and Canada. "Shakes, juices, and smoothies grow at a fast pace when the product, and this is the case, is especially focused on consumers and sustainability," explains Andrea Macchione, CEO at Polo del Gusto.

Polo del Gusto (Illy) rileva il 100% di Achillea (Ponti)

Il Polo del Gusto amplia la propria rete di attività. La sub-holding della famiglia Illy che racchiude tutte le attività f&b del gruppo, caffè escluso, ha siglato un accordo con Ponti Holding per rilevare il 100% di Azienda Montana Achillea, società piemontese specializzata nella produzione di succhi e composte di frutta biologica e premium. La famiglia Ponti entra all'interno di Polo del Gusto con una partecipazione fino al 2,5%. L'acquisizione di Achillea permetterà di accelerare l'internazionalizzazione del brand, già presente in Usa, Corea e Canada. "Frullati, succhi e smoothies hanno tassi di crescita molto forti quando il prodotto, come in questo caso, è particolarmente attento al consumatore e alla sostenibilità", spiega Andrea Macchione, Ad di Polo del Gusto.

EU POSTPONES DECISION ON NUTRIScore UNTIL 2023



The decision on the proposed EU regulation on the common nutrition label has been postponed until the second quarter of 2023. The system is highly promoted by France and widely critiqued by Italy which considers that it disadvantages local food items, mainly PDOs and PGIs. Following Italy's opposition in the past month of October, the EU has indeed decided to push the scheme decision forward to 2023. Now Brussels has made informed that it has been carrying out an analysis on different labelling schemes, in order to showcase the final proposition by the end of the first semester of 2023 and, possibly, implement the system starting from 2024. In the EU, the Nutriscore has been first adopted by France, where there had been oppositions, and then Belgium, Germany, The Netherlands, Luxembourg, Switzerland, and Spain.

Nutriscore, l'Ue rinvia la decisione al 2023

Prosegue il dibattito sul Nutriscore. Sistema fortemente sostenuto dalla Francia, e aspramente criticato dall'Italia, che si è opposta ritenendolo penalizzante per i prodotti alimentari locali, soprattutto Dop e Igp. Nel mese di ottobre 2022, l'opposizione del Bel Paese è risultata in un rinvio della decisione dell'Ue, che aveva dichiarato di essere al lavoro su una nuova proposta elaborata a livello europeo. Ora, Bruxelles ha dichiarato che condurrà un'analisi su diversi sistemi di etichettatura, per poi presentarne le conclusioni entro la metà del 2023 ed eventualmente adottarne l'esito dal 2024. All'interno dell'Ue, il Nutriscore è stato adottato dapprima in Francia, dove inizialmente ci sono state opposizioni, per poi essere esteso anche a Belgio, Germania, Olanda, Lussemburgo, Svizzera e Spagna.

INTESA SANPAOLO AND SACE SUPPORT ANDRIANI'S GROWTH WITH A LOAN OF 11 MILLION EURO

Andriani, Benefit Company specialized in the production of gluten-free pasta with brands like Felicia, in which the financial holding Nuo has a 26.4% share, is supported by Intesa Sanpaolo and SACE with a loan of 11 million euro. The loan is guaranteed by SupportItalia by SACE, the tool provided for in the Assistance Decree to support loans issued by credit institutions aimed at countering the negative effects of the Russian-Ukrainian crisis and high energy prices on Italian companies. With this operation, the Puglia-based pasta factory will continue on its growth path with ESG (environmental, social, and governance) interventions, defined with the support of Intesa Sanpaolo.

Intesa Sanpaolo e Sace: finanziamento da 11 milioni di euro per supportare la crescita di Andriani

Finanziamento da 11 milioni di euro per Andriani, società benefit specializzata nella produzione di pasta gluten free con il brand Felicia, partecipata al 26,4% dalla holding finanziaria Nuo. L'investimento è stato concesso da Intesa Sanpaolo e assistito da Garanzia SupportItalia di Sace, lo strumento previsto dal Decreto Aiuti per sostenere i finanziamenti rilasciati dagli istituti di credito destinati a contrastare gli effetti del conflitto in Ucraina e del caro energia sulle imprese italiane. Con quest'operazione, il pastificio pugliese consoliderà il proprio percorso di crescita, da realizzarsi attraverso interventi Esg (environmental, social e governance) definiti con il sostegno di Intesa Sanpaolo.

IT'S BIO: THE STATE OF THE ART OF THE ITALIAN AND EUROPEAN ORGANIC MARKET



The European organic market, according to Eurostat's sources, should increase by 8% by 2026. Italian exports grew by 16% in 2021, and the European average per capita expenditure amounts to 100 euro, with peaks of 300 euro in Germany, Denmark, France, and Benelux. In Italy, the large-scale distribution is the main channel for organic products, accounting for 50% of the total sales. "The EU," highlights in the context of the project It's Bio Claudio Scalise, manager of the Sg Project, "established the target of 25% of agricultural land under organic farming by 2030. In Italy we are currently at 17.4%, hence we are well placed." The other main producers are Spain and France at around 10%; Germany, the first EU market for consumption, also reaches 11% approximately.

It's Bio: i numeri del mercato italiano ed europeo del biologico

Il mercato europeo del biologico, secondo le fonti Eurostat, dovrebbe crescere dell'8% da oggi al 2026. L'export italiano è incrementato del 16% nel 2021, e la spesa media europea è di 100 euro annui pro-capite, con picchi di 300 euro per Germania, Danimarca, Francia e Benelux. In Italia, la Gdo è il principale canale di commercio del biologico, rappresentando il 50% delle vendite. "L'Ue", sottolinea nel contesto del progetto It's Bio Claudio Scalise, manager di Sg Project, "ha dato un target di sviluppo in termini di superficie da dedicare al biologico del 25% entro il 2030. In Italia siamo ad oggi intorno al 17,4%, quindi in una buona posizione". I principali altri produttori sono Spagna e Francia attestati intorno al 10%; la Germania, primo mercato europeo come consumo, è anch'essa intorno all'11%.

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FROM THE EU, NEW DIRECTIVES AGAINST GREENWASHING

With 525 votes in favor, 60 against and 28 abstentions, the European Parliament voted in favor of the Corporate Sustainability Reporting Directive (CSRD). The directive, proposed by the European Commission in 2021, obliges large European companies to make public, on a regular basis, data relating to their environmental and social impact. The goal is to fight greenwashing. The companies will be required to transparently communicate their impact on the planet, human rights, and social standards. In order to prove the truthfulness of the information given, the companies will be subject to inspections and independent certifications. For nearly 50,000 companies in the EU, collecting and sharing sustainability information will become the norm, compared to about 11,700 companies covered by the current rules.

Dall'Ue nuove direttive contro il greenwashing

Con 525 voti favorevoli, 60 contrari e 28 astensioni, il Parlamento europeo ha votato a favore della Corporate Sustainability Reporting Directive (Csrd). La direttiva, proposta dalla Commissione europea nel 2021, obbliga le grandi imprese europee a rendere pubblici, con frequenza regolare, i dati relativi al loro impatto ambientale e sociale. L'obiettivo è contrastare il greenwashing. Alle imprese verrà così richiesto di comunicare in modo trasparente il proprio impatto sul pianeta, sui diritti umani e sugli standard sociali. Per dimostrare la veridicità delle informazioni fornite, le aziende saranno soggette a controlli e certificazioni indipendenti. Inoltre, dovranno garantire l'accesso digitale ai propri dati sulla sostenibilità. Saranno circa 50mila le aziende Ue a condividere informazioni circa il proprio impatto sostenibile. A fronte delle 11.700 coperte dalle norme attuali.

NATURAL ORIGIN INGREDIENTS: HI-FOOD (CSM INGREDIENTS) NEW FEATURES

Hi-Food, specialized in clean label and high technological ingredients and part of the Csm Ingredients Group, introduced its novelties during Food Ingredients Europe 2022, in Paris from 6 to 8 December. Among the new products, there is a range of textured vegetable proteins for specific plant-based applications, high in protein content, allergen-free, color and taste neutral, thus making them extremely versatile. Veganeez is also new: value added clean label ingredients bases for the cold production of high-quality condiments, that substitute eggs. Hi-Fibre WF is also worth mentioning, a natural emulsifier and stabilizer, additive replacer also to turn liquid oils into gellified fats in bakery products and in many sauces and gastronomy applications; and Hi-Shield, a range of natural origin products designed to prolong foods' shelf lives.

Ingredienti naturali: le novità di Hi-Food (Csm Ingredients)

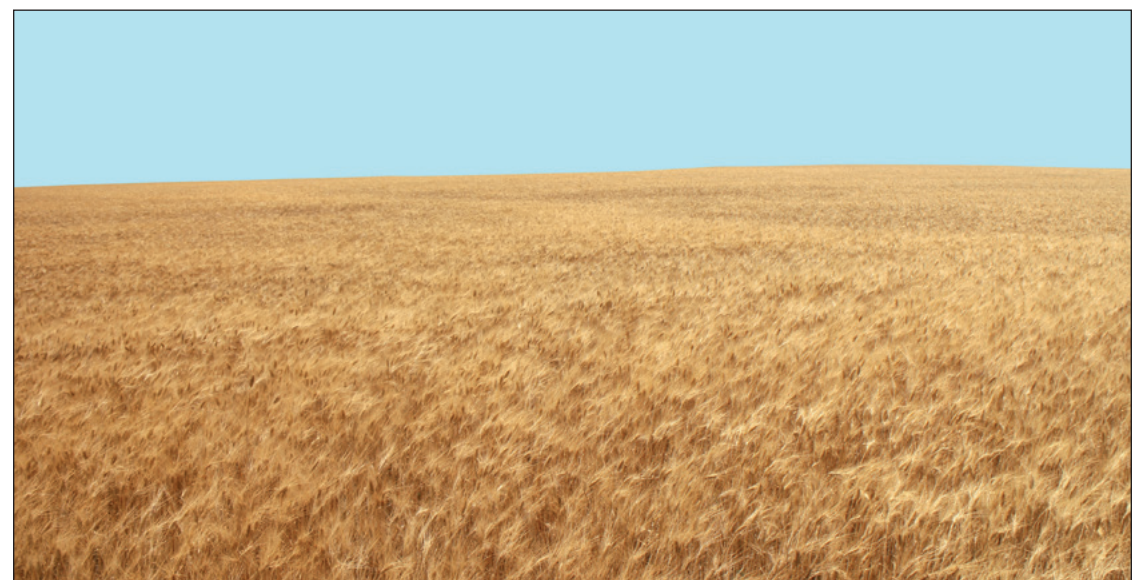
Hi-Food, specializzata in ingredienti di origine naturale e parte del Gruppo Csm Ingredients, ha presentato le sue novità in occasione del salone Food Ingredients Europe 2022, a Parigi dal 6 all'8 dicembre. Tra le novità figura una gamma di proteine vegetali testurizzate per specifiche applicazioni plant-based, ad alto contenuto proteico, senza allergeni e neutre in sapore e colore, quindi estremamente versatili. Un'altra novità è rappresentata da Veganeez, una base funzionale per la produzione a freddo di salse vegane di alta qualità che va a sostituire le uova. Da segnalare anche Hi-Fibre WF, un sistema concentrato a base di fibre vegetali solubili che permette la sostituzione degli emulsionanti nei prodotti da forno e in varie applicazioni di salse e gastronomia; e Hi-Shield, una gamma di ingredienti di origine naturale progettata per prolungare la shelf life dei prodotti.

MARTINOROSSI RELEASES FIRST SUSTAINABILITY REPORT

MartinoRossi, the company specialized in the production of flours, semi-finished products and functional ingredients from cereals and pulses, released its first sustainability report. Two are the pillars at the core of the report. The first is food safety. MartinoRossi takes care of each product phase first hand, in order to guaranteed a direct supervision on the whole supply chain. The second key element is innovation, as for products and processes. Two departments dedicated to R&D allow to study new crops, process technologies, and improve the production outputs thus reducing waste, consumption and the environmental footprint. The company also aims at further developing the project Underdrip, the business founded by the president Giorgio Rossi through which MartinoRossi experiments a precision sub-irrigation system.

MartinoRossi pubblica il primo bilancio di sostenibilità

Pubblicato il primo bilancio di sostenibilità di MartinoRossi, azienda specializzata nella produzione di ingredienti, semilavorati e prodotti funzionali da cereali e legumi senza glutine, allergeni e Ogm provenienti da filiera controllata 100% italiana. Due i pilastri al centro del report. Il primo è la sicurezza alimentare. MartinoRossi si occupa direttamente di ogni fase della produzione, per avere un presidio diretto di tutta la catena del valore. Il secondo è l'innovazione, di prodotto e di processo. Due divisioni dedicate a R&D permettono di studiare nuove coltivazioni, tecnologie di processo e migliorare le rese produttive riducendo scarti, consumi e impatto ambientale. Portato avanti anche lo sviluppo del progetto Underdrip, società fondata dal presidente Giorgio Rossi attraverso cui MartinoRossi sperimenta un sistema di sub-irrigazione di precisione.



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ZOOM

PDO Economy: a record-breaking industry

The 20th Ismea-Qualivita report portrays the Italian food and wine districts' growth. The sector is worth over 19 billion euro, with exports more and more on the rise.



Italians – and not only – choose excellences. As evidenced by the 20th Ismea-Qualivita report, which through an in-depth analysis of the Italian PDO, PGI, and STG agri-food and wine production in 2021 showcases record-breaking results. The PDO Economy has indeed reached an overall production value of 19.1 billion euro (+16.1% year-on-year) and exports for 10.7 billion euro (+12.8%). The data showcase the growth of the sector, which today accounts for 21% of the overall turnover of the Italian agri-food sector. A significant achievement, which is the result of the joint effort of a system which in Italy involves more than 198,000 operators and 291 Protection Consortia.

Dop Economy: business da record

Il XX Rapporto Ismea-Qualivita fotografa la crescita del settore. Il comparto agroalimentare e vitivinicolo a indicazione Geografica vale oltre 19 miliardi di euro e conquista sempre più i mercati internazionali.

THE PDO AND PGI AGRI-FOOD SECTOR SKYROCKETS

The PDO and PGI food production value reached 7.97 billion euro (+9.7% year-on-year and +26% over the decade) while the retail value amounts to 15.82 billion euro (+4.5% on an annual basis). Exports continue to grow – at 4.41 billion euro (+12.5%), a value that doubled since 2011 (+99.6%) – with the main destination markets being the US, Germany, France, UK, and Spain. Let's see, more in detail, the main achievements in the agri-food sector.

Cheeses

The PDO and PGI cheese sector, in the food category, ranks first as far as value of production. In 2021 – thanks to the demand recovery following the return to the post-pandemic life and the Renaissance of the Horeca industry – cheeses recorded 4.68 billion euro (+12.8%), with exports at 2.38 billions (+15.4%). Parmigiano Reggiano PDO, Grana Padano PDO, Mozzarella di Bufala Campana PDO, Gorgonzola PDO, and Pecorino Romano PDO are the first five products for production value.

Delis and meat products

With a production value of 1.95 billion euro, PDO and PGI delis and meat products increased by 4.6% mostly thanks to price rises at the source. Exports performed brightly too, showing a double-digit recovery. Prosciutto di Parma PDO, Mortadella Bologna PGI, Prosciutto di San Daniele PDO, Bresaola della Valtellina PGI, and Speck Alto Adige PGI represent the first five supply chains for production value.

Balsamic Vinegar

The Balsamic Vinegar category is key, ranking third as for value in the PDO and PGI sector. Notwithstanding the fact that the segment is territorially limited to the provinces of Modena and Reggio (in the Emilia-Romagna Region) – driven by the Aceto Balsamico di Modena PGI –, in 2021 it generated a production value of 407 million euro (+10.7%). Exports, which amount to 934 million euro, account for 92% of the production and 21% of the exports in value of the PDO and PGI food category overall.

Pasta, bakery, patisserie, and other categories

Pasta ranks fifth for production value (at 246 million euro) and fourth as for exports (202 million euro). A brilliant achievement mainly led by Pasta di Gragnano PGI which proves to be among the first 10 Italian GIs for value in the food segment. Great results also for the bakery and patisserie products which reach a production value of 100 million euro (+22.3%). The most significant results come from Cantuccini Toscani PGI (+55%), yet they involve all the denominations, starting from Piadina Romagnola PGI which leads the category.

Olive oil

Olive oil completes the picture showcased by the Ismea-Qualivita report. The sector recorded a production value of 91 million euro (+27.9%) and it has seen an increase in certified quantity. Tuscany, Puglia and Sicily are the main producers and the first five supply chains by value are Toscano PGI, Terra di Bari PDO, Val di Mazara PDO, Sicilia PGI, and Riviera Ligure PDO.

PDO AND PGI WINES CONTINUE TO GROW, OVERSEAS TOO

Record-breaking year for the Italian PDO and PGI wine sector. In 2021, 27 million hectoliters of wine were bottled (+10.9% year-on-year). The value of the bottled wines exceeded 11.16 billion euro (+21.2%), mainly attributable to PDO ones (+22%), with great names leading the growth. The value of the bulk wine production reached 3.85 billion euro (+19.1%). Exports exceeded 6 billion euro (+13% year-on-year and 74% over the decade): in 2021 the extra-EU countries recovered, starting from the US (+17.6%) which remain the main destination market, followed by Germany, UK, Switzerland, and Canada. The first wines by value are Prosecco PDO, Conegliano Valdobbiadene – Prosecco PDO, Delle Venezie PDO, Asti PDO, and Puglia PGI.



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MARKETS & DATA

Agri-food between export and slowbalization

2022 was characterized by difficult and demanding challenges. Without a doubt, the war between Russia and Ukraine has represented a real shock for the global economy. The geopolitical tensions triggered by the Russian invasion in Ukraine have indeed thrown new shadows on the economy which was already struggling with the long-term effects of the Pandemic and raw material shortages. Following such dynamics we witnessed skyrocketing prices – which to this day have been weighing on companies alongside the whole supply chain, as well as consumers' spending power – and a devastating impact on the global economic situation. So much so that it caused old balances to collapse and it made every activity, export included, risky and expensive. Italian agri-food,

though, has proven that, in such a dramatic context, it is able to stay the course. The sector has made the most of its strengths and aimed at repositioning its presence. As a key player. Soaring costs, the energy crisis, geopolitical tensions, and the African swine fever did not halt Italian agri-food exports. After 2021 record performances – with exports at over 52 billion euro, of which 40.7 billions deriving from the food industry (+10.9% year on year) –, data on the first months of 2022 uphold the growth trend. From January to July sales of made in Italy food & wine abroad indeed reached a turnover of 34.5 billion euro with a +18.6% increase compared to the first seven months of 2021 according to ISMEA. The Institute of Services for the Agricultural and Food

market's latest report 'La Bilancia dell'agroalimentare italiano' ['The trade balance of Italian agri-food', Ed.] provides a detailed picture of the made in Italy food trade balance. Looking at the industry sectors, export data showcase an overall positive trend across all production departments (except for 'fresh and processed fruit'). Cereals, rice, and derived products grew by 31.7% at 3.6 billion euro in the first semester of the year, wines and musts almost reached 3.8 billion euro (+13.5%). Export of 'milk and milk products' also performed positively, with a growth rate of 21.9%, achieving a turnover of 2.4 billion euro. The main destination market for Italian agri-food products is the European Union, which at 16.9 billion euro in the first six months of

Amidst the geopolitical storm, made in Italy food sales in the world are not slowing down. The sector is resilient. And it looks for new commercial outlets. Yet the elements and mechanisms that move in the opposite direction of globalization are many.

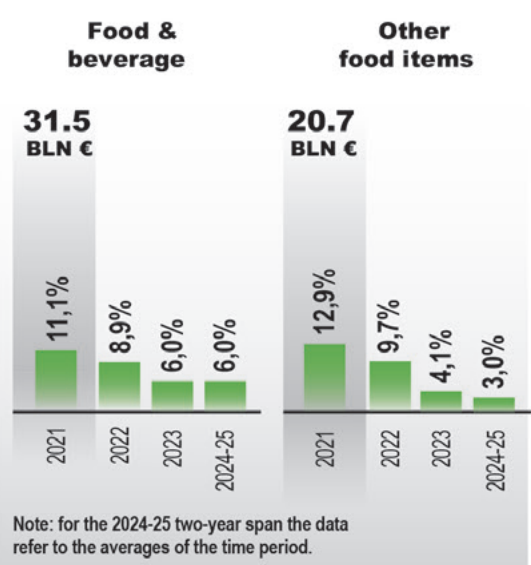
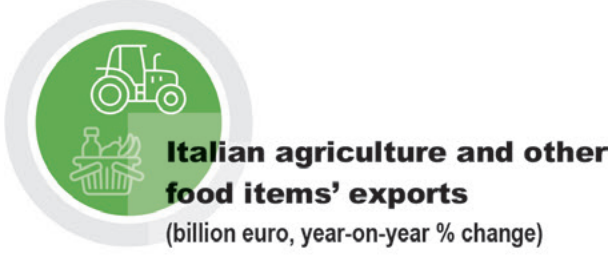
2022, it accounts for approximately 57% of the national exports. In general, Germany, the US and France are the most relevant partners, all boasting high growth rates. Whereas, among the main destination countries, only Japan and China move against the trend.

New markets for the Italian agri-food

There are markets where Italian agri-food exports, in the next years, will be particularly dynamic. As a matter of fact, according to a study carried out by SACE (the Italian insurance-financial company specializing in supporting businesses' competitiveness in Italy and around the world) Saudi Arabia will record a double-digit growth in imports of Italian food (+21.2%). Exports to the United Arab Emirates, Mexico, and Spain will also increase. The same goes for the US, Colombia, and India.

The growth continues in the years to come

After having reached a record high, at 52 billion euro, agri-food sales beyond borders will continue to perform well. SACE estimates a growth in exports by 9.2% in 2022, supported slightly more by agricultural produce (+9.7%), due to the increases in production inputs. Yet, the positive trend is expected to continue in 2023 too, with a +5%. However, there are still potential downside risks linked to the uncertain international situation and the sharp increases in costs, especially in fertilizers and energy, extensively employed in the manufacturing and processing of a great number of agri-food products. Furthermore, the sustainability issue (apart from food safety), which consumers are ever more interested in, will be at the core of the sector's development and Italy already plays a significant role in the matter: the country, indeed, ranks second in the world (following the United States) with regards to organic products' exports, which account for 5.6% of the made in Italy agri-food exports in 2021 (source: Osservatorio SANA-Nomisma).



Source: SACE's analysis on ISTAT and Oxford Economics' data



L'agroalimentare tra export e slowbalization

Nella tempesta delle tensioni geopolitiche, non si arrestano le vendite del food made in Italy nel mondo. Il settore è resiliente. E guarda a nuovi sbocchi commerciali. Ma sono molti gli elementi e i meccanismi che agiscono in direzione inversa alla globalizzazione.



VOG has an organic apple for every need, 12 months a year

The international expertise, origins and wide range of varieties and brands of the Consortium make it the ideal partner for the organic apple category.

Annual production of over 35,000 tonnes of organic apples grown in a dedicated area of South Tyrol - Südtirol. Three hundred member growers, a wide range of varieties and brands, 40 export countries and a presence on the market 12 months a year, always with top quality fruit. These are the organic farming numbers of the VOG Consortium of Terlano (Bolzano, Italy), one of the biggest apple producers in Europe.



Thanks to its origins, expert and efficient organisation and rich assortment, the VOG Consortium is the ideal partner for managing the organic apple category in stores.



Globalization's fragility: Slowbalization

The dramatic global economic scenario (from the trade war between the US and China, through the Pandemic to the Russo-Ukrainian war) has uncovered elements and mechanisms that move in the opposite direction of globalization. The word that describes such a situation is 'Slowbalization', that is changes in the global economy slowing down the process of the internationalization of economic activity. The phenomenon, though, had actually begun several years back, and the decrease in investments among countries bears this evidence: the variation 2021/2026 amounts to approximately 500 billion dollars (source: Ufficio studi Coop - Nomisma on World Bank data). Global issues that arose between 2021 and 2022 have disrupted supply chains causing the worldwide economy to row in this direction. As thoroughly highlighted by the Rapporto Coop 2022 (the Italian retailer's annual report, Ed.), the war between Russia and Ukraine has alerted the markets to the consequences of shortages of energy raw materials and agricultural products coming from both nations. Yet the war has not been the only element that weighed on trade in 2022: Omicron variant's wave last Spring caused a significant increase in the number of infected people and Covid-19 related deaths, leading China to impose strict bans in order to stem the spread of the virus, thus halting production and trade. Without forgetting the lockdown in Shanghai, among the main maritime hubs in the world: the shutdown of its activities caused a significant setback in many sectors, with approximately 500 ships blocked out of the roadstead every week and forced to await almost two weeks before being able to unload their goods. In such a scenario, international trade slows down, with a downward revision of the 2022 forecasts of more than 300 billion dollars compared to the beginning of the year.



TRENDS

A bug's life

Tasty, nutritious, versatile, and sustainable. Most likely these are not the first words that would come to mind when describing bugs. Yet from protein shakes to granola bars, edible insects are on the rise in countries around the world in endless nutrient-rich food options. And they are ever more becoming incorporated as ingredients in traditional and popular dishes like pasta, pizza, cakes and burgers. On the other hand, in certain areas, traditionally, insects have also been eaten whole.

Over 2,000 species worldwide are considered edible. However, a much smaller number is discussed for industrialized mass production and partly regionally authorized for use in food. According to the latest publication from Meti-culous Research 'Edible insects market by product', the market for edible insects is expected to grow steadily in the years to come and it could be worth 9.6 billion dollars (9.05 billion euro) by 2030. While it may appear a modern mania, people have been consuming bugs since the dawn of civilization. It is true, though, that they have gained great relevance in the latest years. The FAO states 2 billion people across the globe in about 140 countries - mostly Africa, Asia, and South America - are known to eat such superfoods as part of their daily diets. Indeed, bugs - whether they are consumed whole or pulverized in other recipes - are rich in essential nutrients, especially complete proteins, fats, iron and zinc.

Not only are they nutritious, these novel foods are also proven to be a sustainable source and promote circular economy, in line with the goals required by agri-food chains, lower emissions of greenhouse gases, and use of organic waste. "Insects are much more efficient than the animals we currently breed in processing the food they eat and turning it into protein. To be bred they need little space and little water, they reproduce quickly and their life cycle involves the emission of very few greenhouse gases," explains Lorenzo Pezzato, co-founder of Fucibo, the first Italian company to produce edible insect-based foods. "Bugs can be easily integrated in a circular economy where they act as real transformers of food waste in new and precious proteins," Pezzato adds.

Worldwide, the most frequently consumed insect species are beetles and caterpillars (49%), followed by bees, wasps, and ants (14%), locusts and crickets (13%), hemipterans (10%), dragonflies (3%), termites (3%), flies (2%), and other orders (5%), according to the FAO. A map of the main legislations regulating insects intended for human consumption around the globe. And the sector's future outlook in an interview with Fucibo's co-founder.

European Union

Across Europe, edible insects and insect-containing foods are considered novel foods and require prior health assessment and approval under the Novel Food Regulation (EU) 2015/2283. Such legislation applies to all categories of foods that 'were not used for human consumption to a significant degree' within the EU before 15 May 1997, which is the case of insects. 2021 represents a groundbreaking year for the sector in Europe. As a matter of fact, the Commission gave the go-ahead to the yellow mealworm. Two more insect species have won approval in later months: the migratory locust and the house cricket. EFSA has given the green light to consumption of these insects in a variety of different forms, including frozen, dried, powder and ground. Ongoing applications under scrutiny by EFSA include the black soldier fly and the honeybee drone brood.

US & Canada

In the United States, there is no specific set of standards regulating edible insects' consumption. Governing insect food is under the stewardship of the US Food and Drug Administration (FDA). Already in 2013, the FDA stated that insects are considered food under the Food, Drug, and Cosmetic Act, if that is their intended use. According to such Act, to be allowed for market, the insects must have been bred for human consumption. Products containing insects must follow the standards required by the FDA including bacteriological tests and good manufacturing practice certification. The label on the product must include the common name and the insect's scientific name, and note the potential risks of allergy. Import from other countries is allowed.

In Canada, if there is an international history of safe consumption, a food is not considered novel. For instance, crickets are not considered as a novel food, and today the largest breeder in North America is indeed located in Canada. If, however, an insect lacks a history of safe consumption, it might fall back into the novel food category pending an evaluation by the Bureau of Microbial Hazards in the Food Directorate.

Latin America

Latin America has an old tradition of entomophagy and is currently the second largest market for edible insects in the world (92.2 million dollars back in 2018). However, the number of start-ups producing edible insects is still very low, if compared to Europe and North America. As of today, northern Mexico, Colombia, Ecuador, Venezuela, and southern Brazil are the countries that consume the most insects for food. Namely, Mexi-



co ranks first with 415 species of edible insects, Brazil boasts 122, Ecuador follows with 78, Colombia 51, and Venezuela comes fifth with 39.

Asia-Pacific

Factors such as well-established commercial farming markets for edible insects, the wide availability of various insects, the positive attitude towards insects as food and feed, the absence of specific regulatory barriers, and the presence of key players in the region are all contributing factors to the steady growth of the edible insects' market in the region. Where over 50 species are considered edible and can be consumed throughout the year. The most popular species include silkworm pupae, bamboo worms, locusts, beetles, crickets, and red ants. The region boasts more than 20,000 insect farms, with an annual average production of 7,500 tons/year. With Thailand being one of the largest producers and consumers of edible insects globally (Meticulous Research data, 2020).

Africa

Africa is home to an estimated wild edible insect population of 500 species: ranging from caterpillars (Lepidoptera) to termites (Isoptera), locusts, grasshoppers, crickets (Orthoptera), ants and bees (Hymenoptera), bugs (Heteroptera and Homoptera) and beetles (Coleoptera). Their consumption has been part of African communities for a long time and forms part of their diets and cuisines, particularly within low-income households with limited resources. The Democratic Republic of the Congo, Congo, the Central African Republic, Cameroon, Uganda, Zambia, Zimbabwe, Nigeria and South Africa are proven to be the countries where the greatest amount of insects are consumed. And the most commonly eaten species include caterpillars, termites, crickets and palm weevils.

Yellow mealworms, house crickets and migratory locusts are the first species authorized by the EU for human consumption. What about the rest of the world? A snapshot of the main regulations in force, and the most consumed edible insects.

INTERVIEW WITH LORENZO PEZZATO, FUCIBO'S CO-FOUNDER

Let's start from the beginning. When was Fucibo founded?

The company came quite by chance. Back in 2015 I first got interested in edible insects. And since at the time there was no dedicated magazine, I decided to create one, which is called 'Entomofago'. By working in the field, I came to the realization that something could also be done from a business point of view. And that's how together with Davide Rossi we founded Fucibo. And we opened the first site in England, where we are still present.

Why precisely England?

We wanted to produce in Italy only, yet at the beginning the EU Novel Food Regulation for insects was not evenly applied in all the member states. Countries such as The Netherlands, France, and England had the chance to start before us. In order not to be 'out of the game' we decided to sell on '21bites', thus creating the first platform with insect-based multi-brand products manufactured in Europe and selected by us. When in March 2021 edible insect flour was authorized in Italy too, we were able to create Fucibo Italia and start producing in the country too. After a long period spent studying recipes and looking for the most suitable partners, today we are mostly a digital company based in Schio, in the Veneto Region of Italy. In Italy we are currently the only ones to produce such goods.

Can you give us an overview of the company's product range?

Our intention was to create shapes and products that evoked traditional recipes. Hence, at the moment we produce corn chips and cookies. The recipes are similar to classics and their taste must not be thought of as something 'traumatic', since the insect flour content accounts for merely 10%, as established by the EU Commission itself. Moreover, we will soon begin to distribute corn cakes and pasta. And in 2023 we aim at developing news lines, such as blends for homemade pizza blends.

Where are they distributed?

Currently, we sell through e-commerce platforms 21bites and Postalmarket. Apart from our products, consumers can find other options made in the EU.

What about their nutritional properties?

Generally, insects are known to be high in protein. We are talking about a 65-70% content. On top of this, they are rich in vitamins, omega, iron, and unsaturated fats, that is the so called 'beneficial fats'. Therefore, such products provide the essential nutrients that the body needs daily. Furthermore, insects' powders are complete proteins.

Can insect foods trigger allergic reactions?

To date, the only issue detected with such foods is linked to the presence of tropomyosin. A protein found in arthropods, an animal group which also includes crustaceans. Up until now, indeed, the only allergic reactions to insect-based products have been noticed in people allergic to shellfish.

According to you, how will the sector evolve in the future?

It is now clear that these products will carve out a slice of the market for themselves. Our vision is that insects are not supposed to substitute meat or other traditional foods, but that they become part of a complete and balanced diet. In a nutshell, the goal is not to replace granny's lasagna with a plate of fried grasshoppers. Insects, besides food, can have multiple applications, even though they are still under development. For instance, functional foods for people with certain animal or plant-based protein intolerances. But even by-products for cosmetics and surgery. The prospects are broad and already in the next two years we will see many innovations. As of now, the sector is focused on providing high-quality food items to give all consumers the chance to discover these extraordinary ingredients, also by introducing them on supermarket shelves besides conventional options.



Fucibo's chips with insect powder

Aperitivo? Sì, ma con gli insetti

Tarme della farina, grilli e locuste sono le prime tipologie approvate dall'Ue per il consumo alimentare. E nel resto del mondo? Una panoramica, certamente non esaustiva, delle principali legislazioni in vigore e delle specie più apprezzate e consumate. Ma gli insetti saranno davvero il cibo del futuro? La parola a Lorenzo Pezzato, co-founder di Fucibo, azienda attiva nel settore del novel food.



THE COMPANY

100% passion for deli meats

One Century after its foundation, Cavalier Umberto Boschi looks stronger than ever. Result of the dedication and expertise handed down for generations. And of a complete offer that has recently welcomed the brand-new Bio Line, on display at Biofach 2023.



From left: Lorenzo and Umberto Boschi

Deli meat specialties from Emilia like Culatello, Coppa di Parma, Prosciutto di Parma, Salame Felino and Strolghino: products that, from Parma, have been able to conquer the palate and heart of consumers around the world. Besides them, renowned products of the Italian charcuterie tradition, like Mortadella, Cooked ham, Bresaola, Speck and much more. Cavalier Umberto Boschi's product assortment is complete, and starts from the most typical products of its territory to embrace all of the Italian deli meats production. Headquartered in Felino, town in the Parma province that gives its name to a unique salami, the company's roots stretch back in time until 1922. Ancient roots that, still today, allow it to stand strong in a turbulent market scenario, providing both Italian and global consumers with new and innovative delicacies. An example is the brand-new Organic Line in trays, that Cavalier Umberto Boschi will showcase on the occasion of Biofach 2023, the world's most important trade show dedicated to organic food, on stage in Nuremberg from 14 to 17 February.

100 years, and not feeling them

Cavalier Umberto Boschi was founded in 1922 by Umberto Boschi and his wife Rosa, with the aim of manufacturing the best of Parma's most typical deli meats. Passion for work and respect for tradition are the 'secret recipe' that, over the course of the years, has been handed down for four family generations until today. A Century-long story made of personal dedication and of the utmost attention paid to quality: a hallmark of the company's production, which turned it in a reference brand both in Italy and abroad. "On global markets," the company explains, "we will enhance one of the most

recent product innovations we launched, the Bio Line in trays. A top-quality range made by our three business units – the deli meat factory, the ham factory and the slicing unit – which make us a unique brand in the organic deli meat market."

Good for you and for the planet

'Good, healthy, sustainable and naturally organic', this is the motto of the new Bio Line, whose trays are made to be sustainable and environmentally friendly, using 70% less plastic. The new 100% recyclable packaging is made entirely of paper and covered with a thin protective film to maintain the freshness of the products for longer. The line is made of pre-sliced Cooked Ham, Raw Ham, and Salami Milano. "Our organic, high quality line of gluten and lactose free products is made using only the healthiest free range, locally farmed, antibiotic free animals", the company highlights. Cavalier Umberto Boschi has always believed in the importance of using a controlled supply chain when sourcing ingredients. "With that in mind and because we take animal welfare and the environment seriously - it adds - we have developed the Linea Bio".

From Parma to the world

With an export share growing by 45% in value and 35% in volume in 2022, Cavalier Umberto Boschi has become a reference brand for global operators. Although the bulk of the foreign business is carried out in the European market, it also works with important customers in non-EU countries. "We mainly operate with pre-sliced products in trays distributed in international grocery retail chains", it explains. "And in 2023, communication will definitely be focused on promoting the Bio Line in the new eco-sustainable tray". For the promotion of its products abroad, the company takes part, every year, in some of the most important industry's trade shows. In 2023, beside Biofach, it will also be exhibiting at Anuga, in Cologne from 7 to 11 October.



www.umbertoboschi.it



THE BIO LINE

Organic Salami Milano Bio



Organic Dry Cured Ham Bio



Organic Cooked Ham Bio



Cavalier Umberto Boschi: 100% passione per i salumi

A un secolo dalla fondazione, l'azienda parmense si presenta ai mercati mondiali più forte che mai. Grazie alla dedizione e competenza tramandate di padre in figlio. E a un'offerta assortimentale completa che, da oggi, include anche la nuova Linea Bio.



Natural & organic cosmetics

The EU deployed against greenwashing

With 525 votes in favour, 60 against and 28 abstentions the EU Parliament has adopted, on the past 28th November, the Corporate Sustainability Reporting Directive (CSRD) presented by the EU Commission in April 2021. The directive entered into force 20 days after publication and the rules will apply in four different steps, starting from 2025 (on 2024 reports). Such rules will make businesses more publicly accountable by obliging them to regularly disclose information on their societal and environmental impact. This would end greenwashing – that is to say making unsubstantiated claims to deceive consumers into believing that a company's products are environmentally friendly or have a greater positive environmental impact than they actually do. The directive is also aimed at strengthening the EU's social market economy and lay the groundwork for sustainability reporting standards at global level.

In detail, the CSRD introduces more detailed reporting requirements on companies' impact on the environment, human rights and social standards, based on common criteria in line with EU's climate goals. To ensure companies are providing reliable information, they will be subject to independent auditing and certification. Financial and sustainability reporting will be on an equal footing and investors



will have comparable and reliable data. Digital access to sustainability information will also have to be guaranteed.

The new EU sustainability reporting requirements will apply to all large companies, whether listed on stock markets or not. Listed SMEs will also be covered, but they will have more time to adapt to the new rules. For nearly 50,000 companies in the EU, collecting and sharing sustainability information will

become the norm, compared to about 11,700 companies covered by the current rules.

"The new rules will make more businesses accountable for their impact on society and will guide them towards an economy that benefits people and the environment", said Jozef Sikela, Minister for Industry and Trade. "Data about the environmental and societal footprint would be publicly available to anyone interested in this footprint. At the same time, the new extended requirements are tailored to various company sizes and provides them with sufficient transition period to get ready for the new requirements."

L'Ue schierata contro il greenwashing

A novembre 2022 il Parlamento europeo ha votato a favore della Corporate Sustainability Reporting Directive (Csrd). La direttiva, proposta dalla Commissione europea nell'aprile 2021, obbliga le grandi imprese europee a rendere pubblici, con frequenza regolare, i dati relativi al loro impatto ambientale e sociale. L'obiettivo ultimo è contrastare il greenwashing, vale a dire la strategia di comunicazione volta a promuovere le iniziative aziendali o i prodotti come ecosostenibili anche se non lo sono.

STATISTA

Green beauty will be worth 58.6 billion dollars globally in 2031

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COMPANIES

The latest news and products

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INTERVIEWS

Certifications: face to face with NATRUE and CCPB

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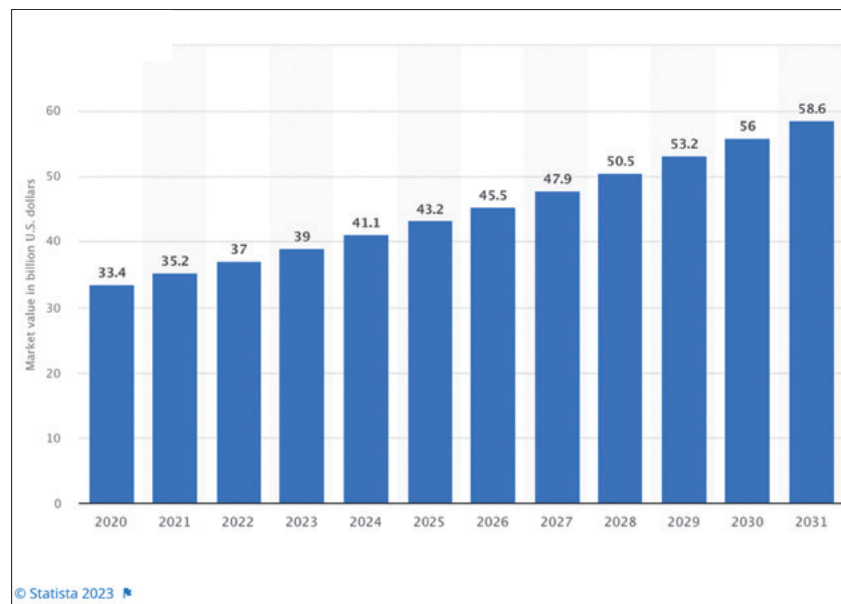


STATISTA: GREEN BEAUTY WILL BE WORTH 58.6 BILLION DOLLARS GLOBALLY IN 2031

The global market value for natural and organic cosmetics and personal care will experience a significant increase, namely from 37 billion dollars (34 billion euro) in 2022 to 58.6 billion dollars (54 billion euro) foreseen for in 2031. The market research company Statista has indeed recently published the sector's growth forecasts for the period 2020-2031. The products (skincare, haircare, make up, oral care and more) are considered natural with respect to two important dimensions: ingredients and processing. However, as Statista evidences, the absence of a specific regulation on the matter and the gap between private standards and administrative interpretations on natural cosmetics generates insecurity in the industry. Looking at the graph, the trend shows the growing importance of natural and organic beauty worldwide and the greater interest shown by consumers, who are increasingly conscious, especially as for consumer goods. As concerns cosmetics, an ever-larger share of consumers is more prone to buying natural and organic cosmetics.

Global market value for natural and organic cosmetics and personal care from 2020 to 2031

(in billion U.S. dollars)



Statista: il beauty green mondiale varrà 58,6 miliardi di dollari nel 2031

Il mercato globale del personal care naturale e biologico passerà da circa 37 miliardi di dollari Usa del 2022 (oltre 34 miliardi di euro) ai 58,6 miliardi (quasi 54 in euro) del 2031. La società di ricerche di mercato Statista, infatti, ha recentemente pubblicato le previsioni di crescita del comparto per il periodo 2020-2031. I prodotti (skin care, hair care, make up, oral care e altri) sono considerati parte di questa categoria in base a due dimensioni importanti: ingredienti e lavorazione. Ma Statista sottolinea che l'assenza di una regolamentazione specifica in materia e la disparità tra norme private e interpretazioni amministrative sulla cosmesi naturale genera molta confusione nell'industria cosmetica. Tornando al grafico, il trend dimostra l'aumento dell'importanza della bellezza naturale e biologica nel mondo e la maggiore preferenza da parte dei consumatori, che sono sempre più consapevoli, soprattutto quando si tratta di beni di consumo personali. Nel caso specifico dei cosmetici, una quota sempre maggiore di consumatori tende ad acquistare cosmetici naturali e biologici.

COMPANIES

MYVITALY GIVES A SECOND LIFE TO OLIVE LEAVES FOR THE CREATION OF NATURAL AND EFFECTIVE PRODUCTS

Since early 2014, MyVitaly has been promoting health and wellness with simple, sustainable, natural and effective products. The company combines modern scientific nutrition with natural remedies, with the aim of providing quality plant extracts through drinks, pills and beauty products. "Our philosophy is focused on the olive tree, a milestone of the Mediterranean tradition", the company explains. "This plant features several healthy benefits, recognized worldwide. Olive leaves, the main ingredient for all our products, have antioxidative properties, helping regulate cholesterol and blood pressure, while boosting metabolism of carbohydrates and lipids. This is due to the presence of polyphenols, such as Oleuropein, Hydroxytyrosol, Elenolic Acid and Rutin". Each production batch is analyzed by an external certified laboratory to ensure a minimum level of active ingredients. With the vast presence of olive trees in many Mediterranean countries, including Italy, MyVitaly is able to guarantee the sustainability of the raw materials used. "Olive leaf is generally considered a waste product during the production of extra virgin olive oil - the company adds - however, we have been able to focus on this ingredient to create a solid, ethically and ecologically sustainable business."

MyVitaly dona una seconda vita alle foglie di olivo per la creazione di prodotti naturali ed efficaci

Dal 2014, MyVitaly promuove salute e benessere attraverso prodotti semplici, sostenibili, naturali ed efficaci. L'azienda combina la moderna scienza della nutrizione con antiche ricette curative e rimedi naturali per fornire estratti vegetali di qualità attraverso bevande, pillole e prodotti di bellezza. "La nostra filosofia è incentrata sull'olivo, pietra miliare della tradizione mediterranea", spiega l'azienda. "Questa pianta presenta numerosi benefici sulla nostra salute, riconosciuti in tutto il mondo. Le foglie di olivo, ingrediente principale di tutti i nostri prodotti, hanno proprietà antiossidanti, aiutano a regolare il colesterolo e la pressione sanguigna, stimolano il metabolismo dei carboidrati e dei lipidi. Ciò è dovuto alla presenza di polifenoli, come Oleuropeina, Idrossitirolo, Acido Elenolico e Rutina". Ogni lotto di produzione è analizzato da un laboratorio certificato esterno per assicurare un livello minimo di principi attivi. Con la vasta presenza di alberi d'olivo in molti paesi del Mediterraneo, tra cui l'Italia, MyVitaly è in grado di garantire la sostenibilità della materia prima utilizzata. "La foglia di olivo è generalmente considerata un prodotto di scarto durante la produzione di olio extravergine di oliva - spiega ancora l'azienda - tuttavia siamo stati in grado di concentrarci su questo ingrediente per creare un'azienda solida, eticamente ed ecologicamente sostenibile".

NATURALIA TANTUM ACQUIRES HARBOR (PHYTORELAX) AND L'AMANDE

Naturalia Tantum, a Group active in the natural cosmetics sector, finalized two acquisitions in Italy at the end of 2022. As a matter of fact, Harbor, with the brand Phytorelax, and L'Amande entered the 'pole' of natural companies. Operations that will lead the Naturalia Tantum group to increase turnover and ebitda margin. "From a common vision between shareholders and management, we have created a unique project in a short period: a strong, diverse and cohesive Group in the natural sector and with solid roots in social and environmental sustainability," explains the CEO, Francesco Iovine. "An extensive work that allows us today to be present in cosmetics and food supplements, both with our own brands and with the private labels of partners who trust us. Furthermore, the strength and size of the Group have allowed us to strengthen our presence abroad which I am sure will become one of the keys for the development of the turnover." Then he anticipates: "And we won't stop here, we are already negotiating with other Italian companies that share the mission of 'natural' just like us."

Naturalia Tantum acquista Harbor (Phytorelax) e L'Amande

Naturalia Tantum, Gruppo attivo nella cosmetica naturale, ha chiuso a fine 2022 due acquisizioni in Italia. Entrano nel 'polo del naturale' anche Harbor, con il brand Phytorelax, e L'Amande. Operazioni che portano il gruppo Naturalia Tantum a incrementare fatturato ed ebitda margin. "Da una visione comune tra azionisti e management abbiamo costruito in poco tempo un progetto unico: un Gruppo forte, diversificato e coeso nel settore del naturale e con solide radici nella sostenibilità sociale e ambientale", dichiara l'amministratore delegato, Francesco Iovine. "Un grande lavoro che ci permette oggi di essere presenti nella cosmetica e nell'integrazione alimentare, sia con nostri marchi sia con le PL dei partner che ci danno fiducia. La forza e la dimensione del Gruppo, inoltre, ci hanno permesso di rafforzare la presenza all'estero che sono sicuro diventerà uno dei punti di forza per lo sviluppo del fatturato". Poi anticipa: "E non ci fermiamo qui, abbiamo già in essere trattative con altre importanti realtà italiane che hanno come noi la missione del 'naturale'".



GREENATURAL: HOME AND PERSONAL CARE THAT RESPECT THE ENVIRONMENT

Greenatural was founded in 2011 based on an idea of Michele Franchetto and Silvia Scantamburlo, a young couple with a passion for natural products. Their goal was to give everyone the opportunity to choose a more sustainable alternative that combines everyday needs with the environmental protection. Greenatural is an eco-friendly, organic brand of sustainable and accessible products, that enables environmentally-responsible consumers to lead an ethical, healthy lifestyle when it comes to household and personal hygiene. Greenatural's main lay in are the care and respect for the environment and nature. The brand combines these values with high-quality products for the household and families. All the items are certified by competent authorities and comply with extremely strict requirements. Greenatural is one of the leading brands in domestic and personal hygiene in Italy and Europe, and in 2023 it also established its presence in the United States.

Greenatural: cura casa e persona nel rispetto dell'ambiente

Greenatural nasce nel 2011 da un'idea di Michele Franchetto e Silvia Scantamburlo, giovane coppia con una passione per i prodotti naturali. Il loro obiettivo era dare a tutti l'opportunità di scegliere un'alternativa più sostenibile che combini le esigenze quotidiane con la protezione dell'ambiente. Greenatural è un marchio ecologico e biologico di prodotti sostenibili e accessibili per l'igiene domestica e personale, che consente ai consumatori responsabili dal punto di vista ambientale di condurre uno stile di vita etico e sano. I valori principali di Greenatural sono la cura e il rispetto dell'ambiente e della natura. Il marchio combina questi valori con prodotti di alta qualità per la casa e la famiglia. Tutte le referenze sono certificate da autorità competenti e seguono requisiti estremamente rigorosi. Greenatural è uno dei marchi leader nell'igiene domestica e della persona in Italia e in Europa, e nel 2023 ha potuto affermare la sua presenza anche negli Stati Uniti d'America.

N&B NATURAL IS BETTER

www.nbnaturalisbetter.com

Since 1989 N&B has been focusing on Research & Development of natural solutions for a better life quality. It follows directly all the steps of the production cycle "from plant to beauty" at Km 0 in Salento (in the Puglia Region). From organic farming (Aloe Vera, Olives, Wheat, Grapes, Official plants, etc); extraction of organic active principles used as raw materials; Research & Innovation; Quality Control; and tailor-made private label development. N&B offers 100% natural and organic products able to restore the personal wellbeing, the balance and the health of the skin. The company has a future-proof philosophy and vision that is based on its life concept 'People & planet first'. Since 2016 N&B is a certified B Corporation, operating according to the highest standards of social and environmental performance.



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Application areas

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'PRIMA SPREMITURA': COSMETICS MADE WITH ORGANIC TOSCANO PGI EXTRA VIRGIN OLIVE OIL

Prima Spremitura by Idea Toscana was born in 2008 from the genius of Antonio Pieri and Ludovico Martelli. The range, which respects the environment, the territory, and wellbeing, is the first cosmetic line to have been authorized by the Italian Ministry of Agricultural Food and Forestry Policies to manufacture its products entirely with Organic Toscano PGI Extra Virgin Olive Oil. Both Tuscan entrepreneurs are pioneers of an unprecedented challenge: they were able to conquer many countries worldwide with a cosmetic line and a powerful idea. Tuscan oil is proven to effectively counteract free radicals, which cause ageing, as it is rich in monounsaturated and polyunsaturated fats. Moreover, it has a very low acidity and it can be easily metabolized by the human body, it also entails a great amount of polyphenols and vitamin E. The mission: conveying to those who choose Idea Toscana the values of nature and of a high-quality product, recalling the scents and the Tuscan craftsmanship wherever they might be.

'Prima Spremitura': cosmetici a base di Olio Extra Vergine di Oliva Toscano Igp Biologico

Dalla genialità di Antonio Pieri e Ludovico Martelli, nel 2008 nasce una linea che rispetta l'ambiente, il territorio e la salute: Prima Spremitura di Idea Toscana è la prima linea cosmetica ad aver avuto dal Ministero delle Politiche Agricole e Forestali l'autorizzazione a realizzare interamente i suoi prodotti con Olio Extra Vergine di Oliva Toscano Igp Biologico. I due imprenditori toscani sono i pionieri di una sfida che non ha precedenti: con una linea cosmetica e con un'idea forte hanno conquistato vari paesi del mondo. L'olio Toscano è particolarmente indicato come schermo contro i radicali liberi, causa dell'invecchiamento, in quanto è ricco di Grassi Monoinsaturi e Polinsaturi, ha una bassissima acidità ed è facilmente metabolizzabile dall'organismo umano, oltre a essere ricco di polifenoli e vitamina E. La missione: far vivere nei cuori di chi sceglie Idea Toscana il valore del naturale e di un prodotto di qualità, ricordando i profumi e l'artigianalità toscana ovunque essi siano.

Idea Toscana
Cosmetici Naturali e Biologici per il Benessere

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INTERVIEWS

NATRUE AISBL, THE INTERNATIONAL NATURAL AND ORGANIC COSMETICS ASSOCIATION

www.natrue.org

NATRUE is a Brussels-based international non-profit association committed to promoting and protecting natural and organic cosmetics worldwide. Founded in 2007, it works to ensure better regulation. Indeed, it commits to developing its internationally applicable private standards' label criteria for third-party certification; promoting the NATRUE label; participating and contributing to EU regulatory decision-making to ensure the availability and protection of raw materials and better regulation for claims; and providing access for consumers to high quality information about natural cosmetics.

Dr. Mark Smith, Director General

Is cosmetic companies' interest in Green Certifications still growing, despite the complex global scenario?

Natural cosmetics have benefited from increased interest in the past 5-10 years and over the last half decade the sector has become increasingly competitive. Nevertheless, today there are identifiable risks for the sector including the raw material supply chain, climate change impacts and rising costs due to inflation. Additionally, the pandemic saw brands move to online sales, in some cases D2C (direct-to-consumer) channels.

In your activities, have you ever dealt with the greenwashing phenomenon?

Not for products certified with the NATRUE label criteria. Yet, either in local stores or at trade shows, I have witnessed products that make vague claims indicating 'bio' or 'organic' in the brand or to describe the formulation. As for the latter, some products claiming that they are 'organic' actually only entail a single organic substance. Marketing can be subtle, as demonstrated in a 2021 consumer survey NATRUE carried out in



Germany and France. Which showed that consumers willing to buy natural or organic cosmetics risk being misled by marketing 'tricks' from nature-inspired brands.

Which are today, in your opinion, the organic cosmetic industry's biggest difficulties?

The overarching issue that the entire industry faces is the transition to sustainability. Packaging also remains high on the agenda

in the efforts to reduce waste, environmental impact and increase sustainability. Greenwashing is also a fundamental challenge. Nevertheless, consumer demand sparks a clear opportunity for raw material and new product development with a focus on natural, renewable, circular, and sustainable innovation underpinned by green chemistry and certifications.

What kind of actions do you think should be taken in this regard?

As for greenwashing, it requires a combination of bottom-up and top-down approaches. Including investor and/or brand pressure with raised consumer awareness and demand for 'green' products, industrial competition driving best practices. In the meantime, private, voluntary standards permitting third-party certification, like NATRUE's own, facilitate consumer transparency and reassurance. Moreover, the recent EU proposal to revise the Packaging and Packaging Waste Regulation aims to bring clarity to consumers and industry, preventing waste, boosting reuse and refill, and making all packaging recyclable by 2030.

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CCPB

www.ccpb.it

CCPB certifies organic and eco-sustainable products worldwide. As an inspection and certification body it operates in the agri-food industry and in the non-food sector, more specifically cosmetics, detergents and textiles. Natural and organic cosmetics are made of natural or organic certified ingredients. CCPB has been acknowledged according to NATRUE's standard, which stipulates that 95% of natural ingredients need to be certified as organic. CCPB also offers a validation service of the naturalness and organic level index calculation for cosmetics and their ingredients following the ISO 16128 guideline.

Costanza Marri, NATRUE & Textile Scheme Manager

Is cosmetic companies' interest in Green Certifications still growing, despite the complex global scenario?

Despite the complex global scenario, companies continue to have a high interest in a natural and sustainable connotation of cosmetic products. A clear signal, for example, is represented by the return to trade show and events in presence or products' process innovation.

In your activities, have you ever dealt with the greenwashing phenomenon?

Yes, and I would add unfortunately. When an organization chooses to certify its cosmetic products, it first decides to seriously engage in the selection

of natural and organic ingredients. Unfortunately, the labels of non-certified cosmetics are increasingly pushed to imply that a cosmetic that has only a 0.001% natural ingredient is a 100% natural cosmetic. It would be much simpler if the official legislation shed light on the correct application of the words Natural or Organic. For this, we are assisted, on the one hand, by non-profit associations, such as NATRUE that define clear principles in order to combat greenwashing, on the other hand certification bodies, such as ours, that check the authenticity of claims.

Which are today, in your opinion, the organic cosmetic in-



dustry's biggest difficulties?

Environmental sustainability is definitely the first big challenge today. Followed by distinguishing certified organic products from those that are only decla-

red natural or organic, which is tightly linked to making consumers understand the value of certification. Moreover, talking about costs, I would mention the shortage of raw materials, quality at the right price, and also making organic to natural cosmetics available for everyone, not just a niche market.

What kind of actions do you think should be taken in this regard?

Every action should be shared between the different actors of the production chain to achieve common objectives of environmental sustainability. With this regard, we should promote more discussion tables and set high goals.

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DISCOVER

Vegan 'cheese': a flourishing market



The animal-free 'dairy' sector in constantly expanding all over the world. And, according to the forecasts of Grand View Research, it will keep growing until at least 2030.

The vegan 'cheese' sector is expanding. In 2021, it was worth globally 2.43 billion dollars, equal to 2.3 billion euros, according to estimations. And despite the downturn registered in 2022 by the meat substitute segment, analyst predict a further growth in the years ahead for the 'cruelty-free' dairy sector. Grand View Research, an India and US based consulting company, expects it to expand at a compound annual growth rate (Cagr) of 12.6% from 2022 to 2030. On the one hand there are plant-based products, like 'cheese' made of fermented nuts or vegetable milks. On the other hand, there are cell-based products, which include all foods created in a laboratory. For the latter, the production process starts from cell cultures and aims at reproducing milk proteins and whey. A copy of the bovine DNA sequence responsible for the production of these proteins is inserted into genetically modified yeast cells, which grow, nourished by sugars and vegetable oils. The proteins obtained are then grinded and combined with other ingredients to create foods similar in taste and look to milk, cheese and other dairy products.

Unilever seems to be interested in producing cow-free dairy too. The multinational company has recently announced the launch of an ice cream made of milk proteins produced through a precision fermentation process. They intend to use yeasts to produce real milk proteins, such as whey and casein, to ensure their products taste like real milk. "We've been looking at precision fermentation for some time", revealed to DairyReporter Unilever president of ice cream, Matt Close. "From an ice-cream point of view, I think we are somewhere between a year and two years off", he added. Unilever, anyway, is in talks with a number of start-ups, that already use precision fermentation, to launch its 'cow-free' ice cream soon.

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Start-ups and millions of dollars investments

Numerous start-ups have already invested in the cell-based segment. Perfect Day is among those that have met with great success. Originally named Muufri, it was founded back in 2014 by two bioengineers, Ryan Pandya and Perumal Gandhi, who aimed at changing food production processes and

What about consumers?

Do consumers like animal-free cheese and dairy? While American companies were forerunners in this sector, European consumers have shown greater interest, allowing higher turnovers. According to Grand View Research, indeed, they are interested in vegan products both because they are sen-

sitive to animal sufferings and for environmental reasons. The Asia-Pacific region is the fastest growing, with an estimated Cagr of 14.1% from 2022 to 2030. The demand for animal-free alternatives to dairy, in this region, is fueled by the demand for plant-based bakery and confectionary with China, Japan and Australia being key contributors to the market growth.

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'Formaggi' veg: un mercato in costante crescita

Il segmento dei 'latticini' animal-free è in costante espansione in tutto il mondo. E, secondo le previsioni di Grand View Research, crescerà ancora almeno fino al 2030. Non mancano infatti investitori che scommettono su start-up innovative, come Remilk e Perfect Day, e su nuovi prodotti di multinazionali affermate (è il caso del gelato 'senza mucche' di Unilever). Ma che cosa ne pensano i consumatori?

RETAIL

Find your mission, grow your business

The world's food system creates 10 trillion dollars in value and feeds billions of people, but it also generates 11.9 trillion dollars of hidden costs, which exceed the value of the industry itself. Health issues (see obesity) and environmental damage are just two very evident sample of such hidden costs. An issue that, nevertheless, also discloses new opportunities for consumer goods brands, according to a report issued by Bain & Company, at least when awareness translates into a stronger demand for more sustainable goods. And this depends on scale.

Purpose-driven brands: who are they?

Purpose-driven brands are companies that make it the mission of their brand to solve a specific environmental, social, or governance (ESG) issue. That mission - whether solving an environmental issue such as pollution or a social issue such as forced labor - becomes the focus of every part of their business, from supply chain to final product and communication too. Hence, they create a simple, compelling message to educate consumers about the issue at the heart of their mission. "For example, Dove brands advocate a positive relationship with beauty and cite data about how typical beauty imagery harms the self-esteem of women and girls", the report highlights. "Beyond Meat cites data about the emissions and land use costs of beef and argues for 'a better way to feed our future.' Each of these brands illustrates how clarity of purpose can change consumer behavior while creating category growth. And as these brands find footholds in the mainstream market, their success has a cumulative effect on their industry and the wider world. As their scale grows, so does their impact".

Beyond their sustainability goals, purpose-led brands also need to deliver great taste, performance and attractive packaging at an accessible price to ensure mass-market appeal, of course. "Don't ever expect consumers to buy your product because it is ethical at the expense of taste and performance," said Richard Reed, cofounder of climate-conscious drink brand Innocent. And Bain agrees: its



global survey, conducted among 60 brands across eight consumer goods categories, found that the most successful companies address consumer demand for both quality and sustainability.

Purpose appeals to consumers, employees and... investors

For those looking for a job that does more than simply pay the bills, purpose-led brands offer an opportunity to also have a positive impact on the world, Bain explains. "More than 40% of millennials say they seek jobs with a purpose. And purpose-led brands provide such employees with agile environments where test-and-learn practices and innovation are encouraged." While the innovation budgets of incumbent companies accounts for as little as 1% to 2% of sales most of the times, purpose-led brands spend far more. At Beyond Meat, just to name one, R&D accounts for 11% of sales.

The issue awareness raised by purpose-led brands also sparks consumer interest. ESG is among the buying criteria of a growing consumer base, with 14% repor-

ting that it is their top criteria. Another 27% rank the planet as their third most important priority after health and quality. The youngest generations (Millennial and gen Z) are especially sensitive to sustainability issues and therefore to purpose-led brands. This, in turn, makes such brands more and more attractive to retailers.

"Within the next five years, millennials, who already over-index on purchasing sustainable goods, are set to have the highest purchasing power of any consumer group", the report says. "Millennials constitute 50% of the market for purpose-led brands, yet represent only a little more than 30% of the market for incumbent brands. The effects of these spending trends are clear: Purpose-led brands bring value to retailers' store shelves and bottom lines, and retailers are seeking products that attract this millennial spending."

"Sustainable insurgents bring profit and traffic," confirms Milena Lazaraveska, formerly of Sainsbury's Future Brands team and currently leader at Delivery Hero. "They increase the basket size and value. They bring incremental sales to the

category, new customers, differentiation, and premiumness." In other words, insurgent brands add value to their category.

Customers, employees, and retailers aren't the only ones taking notice. Observant investors also have tracked the rapid growth rates of purpose-led brands, with investors large and small pouring money into the category. "Sustainable investment assets grew to 35.3 trillion dollars globally last year amid mounting concerns about societal inequities and climate change," the Global Sustainable Investment Alliance noted last year, according to a Bloomberg article. "That's about 1 dollar of every 3 dollars managed globally seeking out a profit from environmental, social, and governance concerns."

From niche to mainstream

The success of purpose-led brands has led to a large number of new, ESG-focused entrants. Between 2019 and 2020, the number of new companies espousing an ESG mission more than doubled. Today, 35% of all new consumer products start-ups have a

clear ESG mission, a ten-fold increase since 2005. "In 2020, 'sustainability' outpaced 'functional benefits,' 'wellness,' and 'convenience' among consumers' top priorities when making buying decisions," Bain explains. "Yet not all of these brands survive. Even fewer make it to mass-market scale."

Hence, companies often struggle to translate success as a start-up into mass-market acceptance. Bain research finds that of all consumer products start-ups, only 10% manage to achieve at least 10 million euro in sales. Even fewer, just 4%, make it to 50 millions. But purpose-led consumer products start-ups face an even more arduous challenge. They must stay true to their ESG mission while scaling and once at scale. As they adapt to a more rapid pace, create larger supply chains, and hire more employees, they must find ways to preserve the ESG values that made them successful in the first place.

For years, the dual difficulties of scaling and staying true to ESG principles made mainstream success a rare achievement. Purpose-led brands started between 2005 and 2010 faced a 14% success rate in reaching 10 million dollars in sales. Comparatively, the index of all consumer products start-ups had a slightly better success rate: 18% reached 10 millions in sales. Yet market changes in the past decade, caused in part by the purpose flywheel, have eased the challenges these start-ups face. Today, 17% of purpose-led start-ups successfully grow to mainstream success. Remarkably, they now outperform the index of all consumer products, whose success rate has dropped to just 10%

What can incumbents learn from successful purpose-led brands?

Insurgent start-ups are not the only ones who can learn from these lessons in how to scale. Incumbents looking to enter this growing market can apply many of the same lessons to their own companies, although the application may look slightly different. Our research suggests four ways that incumbents can adapt the scaling lessons of insurgents: reviving their Founder's Mentality, creating sustainable supply chains, defining their own core purpose-led mission (or 'spike'), and considering mergers and acquisitions (M&A) as a path to purpose-led brands. The latter three are quite easy to understand, so let's comprehend what 'reviving the Founder's Mentality' means. "In their infancy, many purpose-led insurgent brands inherently have what Bain calls the Founder's Mentality. These companies eschew complexity and embrace higher degrees of risk and iteration. They focus on product quality and relentless customer service.

They are fast, agile, and adaptable. Their employees are passionate about the company and its purpose." Bain research finds that one of the differentiators for those small purpose-led brands that successfully grow to mainstream scale is that they preserve the Founder's Mentality as they grow. Companies that fail to do this and instead assign responsibility for purpose-driven goals to a specific person or department often see their sustainability goals turn into a siloed afterthought. "Incumbents seeking to make a lasting transition to sustainability need to follow the example of successful insurgents, embedding a purpose-driven mindset into every function, from supply to sales."

Federica Bartesaghi

Purpose-led brands promise to re-shape (for better) the consumer goods industry. And yet their success depends on scale, a Bain report says.

Largo consumo confezionato: crescono i brand con una mission (non solo economica)

Una nuova generazione di brand guidati da un 'purpose' etico, oltre che economico, punta a rivoluzionare il mercato con prodotti sostenibili e, per questa ragione, molto appealing verso una base crescente di giovani consumatori. Aziende e prodotti che piacciono al mercato e agli investitori. Ma il cui successo dipende dalla scalabilità del progetto, come dimostra l'indagine condotta da Bain

SCENARIO

Bio: a new luxury?

2022 was a difficult year. We keep talking about energy crisis, inflation, war and climate emergency, and of course citizens, in such uncertain times, have become more cautious about their spending. So how can organic products, which are on average more expensive than conventional ones, remain attractive to consumers?

According to data collected by Biofach, the leading international fair for organic food and agriculture, together with Vivanes, the event dedicated to natural and organic cosmetics, in 2021 67% of consumers said they would pay a higher price for sustainable products. A percentage that, in 2022, has dropped to 30%. Almost halved. Apparently, the desire for sustainability is not enough, if not supported by economic stability. Seen in this way, organic food seems to have become a luxury for few. Or not? According to some operators, it is not just a matter of lost: consumers can still choose to buy organic products, even if their economic situation is no longer that rosy.

Maria Grazia Mammuccini, president of the Italian association FederBio, talked about the need for a "food education" strategy on the past 3 December, when she was attending the Festa del Bio (Organic Festival) in Bologna: "It was an important chance to meet and discuss, to explain the differences between organic and conventional products. The Festival has restarted in a difficult moment, with the purchasing power of households eroded by high inflation; that's why we believe it is essential to explain how important it is to buy less, but better. Both the production and the consumption models have to be changed".

In an interview, Mammuccini explained what the sector needs to keep growing, at least in Italy: "We need an Action Plan for the development of organic agriculture, to provide us with a comprehensive strategy to support production, which in 2027 should account for 25% of the agricultural land. Today we stand at 17.4%. This means investing in organic farming, in the rural development of the Italian Regions, but also supporting research, innovation and consumption too, through a stronger communication to people, to make them understand the fundamental values of organic farming." Giuseppe De Noia, president of Anabio, the organic association promoted by CIA-Agricoltori Italiani, agrees with this opinion: besides investments in research, education and development, he also calls for an "effective communication campaign on the values of organic farming." Because "organic products can't be considered a luxury", concludes Mammuccini.



2022 was a difficult year for the organic food market. Data reflect a sharp downturn across Europe, namely in Italy, France, Germany and UK. And yet the sector's revival could be just around the corner, if consumers understood the importance of "buying less, but better".

ITALY



Analysis of the Italian market show a multifaceted trend. Nomisma data presented last September talk about a strong growth in export (+16%) in the year between July 2021 and 2022. Out-of-home consumption (in hotels, restaurants, catering) has grown by 53%, while household's shopping is steady (-0,8%). Sales of specialized shops dropped by 8%, while those of large retail chains remained unchanged. Discounts, for their part, have grown by 14%. If we consider the organic fruit and vegetable market alone, it registered a sharp drop: -9.9% in volume in the first eight months of 2022, and yet results are similar to those of conventional goods.

Member of the European Parliament Paolo De Castro, from the Commission for Agriculture and Rural Development, said that "organic will grow, thanks to the new EU's Common Agricultural Policy (CAP), which aims to give companies a more targeted support". The European organic market, according to Eurostat, is expected to grow by 8% by 2026.

FRANCE



IRI data show a drastic downturn for organic food in France. At the end of October 2022, sales dropped by 5% compared to the same period in the previous year. According to experts the plunge could reach 7-10% at year-end, and for specialized shops previsions are even worse: between -10 and -12%. Grocery retailers are also taking a step away from organic food, whose offer on shelves has decreased by 7.3 percentage points between January and September 2022, according to the French institute of statistics (Insee) and Fnab (French National Federation of Organic Farming).

In specialized shops, Biocoop Scarabée administrator Henri Godron said the drop in sales has led to "a drop in revenue between -7% and -20% in the period between November 2021 and November 2022". Inflation in food cost (+12% in a year) is the main reason of the crisis. In France, organic food sales increased three times in the last decade (going from 4 billion to 12 billion euro), but after the 12% growth experienced in 2020, they have progressively slowed down and 2021 ended with a 1.3% drop in revenue.

GERMANY



In July 2022 food prices increased by 14% in Germany, according to data released by the national Federal Statistical Office. In this gloomy scenario, the organic sector is facing fierce challenges: for the first time ever, the German organic market has shrunk. Between January and October 2022, organic food sales fell by 4.1% in value, with volumes declining by 5.7%. Sales are, however, still expected to reach 15 billion euro, 2.7 billion more than in 2019.

Michael Radau, owner of the SuperBio-Markt chain (that in August started the insolvency proceeding) said: "Consumers have disappeared. Now, they pay attention to prices, at the detriment of quality". Bulk food stores have been hit too: in Berlin, Original Unvepack (one of the most important organic brands) is about to close, and in July two organic shops closed in Hamburg. Market research company Handelsforschung said that at least 25% of Germans fear they won't manage to make ends meet, in the near future. The percentage increases to 50% among people with an income of less than 2,000 euro.

UNITED KINGDOM



In 2021 the UK organic market has overcome the 3 billion pounds in value (about 3.5 billion euro), which represents a 23% growth compared to 2019, UK's Organic Farming Statistics for 2021 show. The United Kingdom had a total area of 507 thousand hectares of land farmed organically (i.e. the fully converted area and area under conversion), an increase of 3.6% compared to 2020. This increase was mainly driven by a 34% rise in the area of in-conversion land compared to preyear. In 2021, the number of organic producers and processors almost hit 6,000.

But despite 2021 results, after 10 years of slow but steady growth, in December 2022 sales of organic food and beverage in UK supermarkets have fallen by 2.1% over previous year. And now, compared to the 1.2% of a decade ago, organic accounts for 1.8% of the overall f&b market.

Bio: un bene di lusso?

Il 2022 è stato un anno difficile per il biologico. I dati mostrano un sostenuto calo del business in tutta Europa, vedi gli ultimi dati pubblicati in Italia, Francia, Germania e UK. E tuttavia un rilancio è possibile. Se solo i consumatori imparassero a "comprare meno, ma meglio".

RICH
IN
**MA
GNE
SIUM**



RICH
IN
**PHO
SPHO
RUS**



RICH
IN
**PO
TASSI
UM**

germinalbio.it



NEW
**COOKIES
STICKS**



A TASTY AND CRUMBLY CUDDLE YOU CAN ALWAYS CARRY WITH YOU, THANKS TO ITS **CONVENIENT SINGLE-SERVING PORTION**. TRY ALL THE FLAVORS: FLAKES & FRUITS, COCONUT & LEMON, CHOCOLATE CHIPS.





FOCUS ON

Crisis-proof (animal) proteins

Investors' interest in vegan food is slowing. Result of a socio-economic scenario that is hitting hard on households' purchasing power and on their sustainability efforts too. And for the cell-based industry, there is one more challenge: misinformation.



It is full of twist and turns the market of products made from proteins that are not from animal origin, the so called 'alternative protein market'. We witnessed a first revolution with the birth of the plant-based industry, whose characteristics immediately captivated the attention of consumers willing to reduce their intake of meat in order to mitigate the negative effects of intense animal farming on the environment. The major critics moved to these products concern the fact of being often ultra-processed, expensive and to imitate the texture and flavor of the 'authentic' ones.

Curiosity did the rest, and so new products and brands emerged, arousing a great interest among investors. In 2019, the sector was literally booming. Think that U.S. plant-based meat, egg, and dairy companies enjoyed a record 747 million dollar in investments: the most capital raised in any single year in the industry's history. A climb to success that, however, was suddenly hindered by – in chronological order – a pandemic, a war and a shocking inflation. Households' interest soon turned to the essential, and even if sustainability remains a hot topic it is no longer the major concern for many.

A frozen market

These and other reasons lie behind the sharp decline in investors' appetite for 'vegan stocks' last year, to all advantage of the meat industry. As the eToro social investing platform highlights, a basket of 10 of the biggest vegan stocks saw its value fall by 51% over the last 12 months, and by 36% over the previous two years. An equivalent basket of shares of the most renowned meat producing companies would have lost investors only 12% in the last year and gained 7% over

the last two years, in US dollar terms. Some recent events support these data: in August 2022, the Californian Beyond Meat cut its workforce by 19% (about 200 employees) and cut its revenue outlook: full-year 2022 revenues in the range of 400 million to 425 million dollars, lower than its previous expectation of 470 to 520 million. In the same month, the Canadian meat producer Maple Leaf Foods downsized its company Greenleaf Foods (vegan brands Field Roast and Lightlife) after a 18% drop in sales. In September, JBS announced the closure of its plant-based protein and meat analogue company Planterra, known with the Ozo brand, while in October Impossible Foods laid off 50 employees as part of a company reorganization focused on the plant-based meat maker's future growth, according to CEO Peter McGuinness. It is therefore not surprising that, in November, vegan stocks collapsed. And if in 2020 the value of sales of alternative meat grew, in the US, by 44%, this growth slowed to +8% in 2021 and +1.1% in the year ending August 2022, according to NielsenIQ data.

The "Frankenstein meat"

But the last frontier in the alternative protein market is certainly cell-based food. Which is arousing considerable concern around the world.

Proteine (animali) a prova di crisi

Si raffredda l'interesse dei grandi investitori per l'industria dei prodotti veg. Risultato di uno scenario socio-economico che mette a dura prova le tasche dei consumatori. Così come i loro slanci di sostenibilità. E per i cell-based c'è un ostacolo in più: la disinformazione.

Federica Bartesaghi



THE BRIDGE
LA FAMIGLIA ORGANIC



HERE COMES YOUR VEGGY COFFEE:
Enjoy the energy of an espresso in this mix of Arabic coffee, almonds, rice and spring water – with no added sugars.
thebridgebio.com

COFFEE
me UP





THE COMPANY

Icam and the chocolate factory

The company's commitment to an all-around sustainability has been ongoing for three generations. The idea behind the project 'Cocoa Stories'. Which offers consumers a virtual insight into the bars' production process.

'Chocolate by nature'. For more than 75 years Icam's activity has revolved around this motto. With 60% product exported to 69 destination markets worldwide, 26,000 tons of cocoa processed and over 400 employees, the company's commitment to an all-around sustainability has been ongoing for three generations. From the seeds' cultivation, to the complex process of the transformation of the cocoa beans into chocolate bars.

Located in Italy, namely in the Lombardy Region, Icam boasts a production center in the town of Orsenigo and a head office, which serves as a logistics hub and houses some secondary packaging production in Lecco. The family-run business also counts on an international presence thanks to two sales offices – Agostoni Chocolate US and Icam Chocolate UK – a representative office in Peru, as well as three fermentation centers in Uganda.

Aiming at accompanying consumers through the discovery of the "good of chocolate" Vanini, Icam's premium brand, recently launched a digital experience into the world of chocolate. The idea behind the project 'Cocoa Stories' presented on 8 November 2022 during an event in Milan at the Copernico Blend Tower spaces.

Virtual travel into the land of cocoa

Bringing cocoa farmers and consumers closer together. Thus illustrating how the beans are ultimately transformed into Vanini's chocolate bars. This is the idea behind the project 'Cocoa Stories'. Icam has chosen to adopt a new connected packaging for its line of Vanini's 'Bagua bars', developed together with the agency ViewToo. A technology that leverages the use of augmented reality to offer consumers a digital experience in the world of chocolate.

"At the core of Vanini's philosophy, lays the attention guaranteed to the whole production chain, the recognition of the value of the people, and the continuous innovation of the



From left: Giovanni Agostoni and Roberto Vanini

technologies implemented," explains Giovanni Agostoni, Icam sales and marketing director. "We have decided to give everyone the chance to travel virtually to the native land of cocoa - in the forests of the Amazon in Peru - to discover the 'cocoa stories' of the farmers who take care of this precious resource every day," adds Roberto Vanini, responsible of QC of raw material and cocoa beans.

Thanks to the QR code on the package, which comes in three different graphics depicting a woman, a man and a girl who are members of the Aprocam cooperative – with which Icam collaborates – consumers will

find themselves in the Bagua district, a region in the north of Peru. Each one of the three protagonists tells a different story in their original Awajun language, accompanied by subtitles. The environment is navigable and, therefore, by moving their smartphones consumers can access different sections in 3D, making the experience more realistic. They can also plant a cocoa seed in its environment and follow, step by step, the growth of the tree.

Sustainability in numbers

Icam's commitment to sustainability is declined in four pillars: supply

Icam e la fabbrica di cioccolato

L'impegno dell'azienda lecchese verso la sostenibilità – intesa a 360° – è una costante negli oltre 75 anni di attività. Tramandata di generazione in generazione. L'idea alla base del progetto 'Cocoa Stories'. Ideato per offrire ai consumatori un tuffo digitale nel mondo del cioccolato.

www.icamcioccolato.com/en



Vanini: Icam's premium brand

Beginning in 2014, Icam re-launched Vanini, the premium chocolate brand which conveys the values and mission of the founder Silvio Agostoni and his son Angelo. The latter, namely, embarked on many journeys which have led to the discovery of ancient cocoa varieties growing in places that are still partially unexplored, such as the Peruvian Amazon and Uganda. Indeed, Vanini's chocolate bars are made with cocoa from select farming cooperatives with whom the company establishes long-standing partnerships, such as the Aprocam cooperative, that produces the single-origin 'Vanini Bagua'.

chain, environment, people, and innovation. Extending in all areas in which the company operates. Hereafter, a brief summary of the achievements on the matter recalled in the company's 2021 Sustainability Report. Whether it is the employees in Italy, or the farmers of cooperatives in the countries of origin of cocoa, people have always been the backbone of the company. In 2021, Icam's staff has been enriched with 17 new units. In the same way, great attention is paid to the farmers of the countries of origin who are constantly trained to increase their technical-agricultural skills to improve and increase the quantity and quality of the crop to obtain a higher payment from the sale of cocoa beans and better the socio-economic conditions of their families. The same attention is also addressed to all the players that can become part of Icam's chain only after sharing and signing the code of ethics of the company, which in 2021, has gathered 100% of the suppliers. The same code was also signed by many of the suppliers from which Icam buys cocoa, reaching 96% at the end of 2021. As for the commitment towards the environment, which sees the company operating while keeping its impact as low as possible, it translates into the increase year after year in the amount of energy that Icam self-produces thanks to the trigenerator, from which in 2021 came 85% of the energy needed for the production, the 10% reduction in CO2 emissions into the atmosphere or the packaging of chocolate bars that in 2021 were made of 96% renewable material.



PRODUCTS

The Organic Showcase

What better display than Biofach 2023 for Italian producers of bio food & beverage, champions of exports also in 2022. In these pages, plenty of products ready to hit the shelves of stores around the world.

La vetrina Bio

Quale miglior palcoscenico di Biofach 2023 per presentare agli operatori di tutto il mondo le proprie novità di prodotto. In queste pagine, l'offerta dei produttori italiani di alimenti e bevande bio, campioni di export anche nel 2022.

MYVITALY

www.myvitaly.com

Verdepuro Bio



MyVitaly Verdepuro Bio is a certified organic food supplement made with olive leaves extract* and marigold flower extract which helps to support the immune system. It is also useful for promoting the control of cholesterol and blood circulation. It has a rich and fruity taste thanks to the presence of organic sweet orange essential oil. Verdepuro Bio is also fructose-free, and therefore suitable for diabetics. Made in Italy.

Ingredients

Extracts aqueous mix of organic *Olive (Olea europaea L.) leaves (66g/L) and organic *Marigold (Calendula Officinalis L.) flowers heads (3,1g/L), agave syrup*, stabilizer: glycerol; preservative: lactic acid; natural flavour: citrus, *sweet orange (Citrus sinensis L.) (Osbeck) essential oil. * Organic agriculture.

Packaging details

500 ml glass bottle and recycled cardboard. The bottle is equipped with a measuring cup to allow the correct and precise intake of the product, 40 ml a day.

Shelf life

24 months

International certifications

VeganOk, certificate of Registration at FDA, Organic by ICEA (Italy).

THE BRIDGE

www.thebridgebio.com

Organic fermented coconut product with lemon (gluten-free)



New organic fermented and plant-based coconut product with 78,5% of light coconut milk and lemon peels, gluten-free and lactose-free. Its creamy texture and consistency make it an excellent vegan and tasty alternative to traditional dairy yoghurts.

Ingredients

Light coconut milk* 78,5% (water, coconut*), lemon preparation* 18% (concentrated apple juice*, lemon pieces* 17,5%, cornstarch*, concentrated lemon juice* 2,5%, natural lemon aroma*), tapioca starch*, thickener: locust bean gum*, live cultures (S. thermophilus, L. bulgaricus, L. acidophilus, B. lactis). *Organic.

Packaging details

Packaging consisting of 3 components that can be easily separated from each other: aluminium lid, plastic cup and cardboard. Cups of 125 ml each.

Shelf life

75 days from packing date.

International certifications

Organic ICEA.

ICAM CHOCOLATE

www.icamcioccolato.com
www.vaniniocioccolato.com

Vanini bars Bio monorigine Uganda



Six bars, all strictly organic, made with an incredible and unique Ugandan cocoa, coming from the Bundibugyo cooperatives where Icam has built a cocoa collection center.

Ingredients

Chocolate Bio Monorigine Uganda dark and gianduja. Inclusions all strictly Bio: whole hazelnuts, whole almonds, whole hazelnuts and caramel, whole salted pistachios.

Packaging details

85 g. Tablets packaged in a compostable flowpack made from paper and a patented biopolymer composed of vegetable substances such as corn starch. Composed of 80% renewable raw materials, it is 100% compostable according to industrial disposal rules.

Shelf life

18 months

International certifications

Bio, 100% Made in Italy, Bean to Bar in Italy, Vegan Ok, Gluten Free, Packaging certificate Ecoert.

FUMAGALLI INDUSTRIA ALIMENTARI

www.fumagallisalumi.it

Prosciutto di Parma Bontà Bio



Authentic Italian cured ham made by organic pork legs, coming from Italian heavy pigs. Firstly the legs are salted and then they rest and slowly mature for a minimum of 12 months, in temperature controlled rooms located in the company's Parma factory. At the end of curing, an inspector from the Parma Ham Consortium assesses the quality of each leg and brands it with the Parma Ducal Crown. Finally the hams are boned, sliced and packed under protective atmosphere. All the supply chain, from farms to final branding, complies with the Protected Designation of Origin specification.

Ingredients

Pork, salt.

Packaging details

Completely recyclable paper trays.

Shelf life

60 days

International certifications

BRC, Organic, Emas, Kiwa, IFS

PRODUCTS

DELIZIOSA

www.prodottideliziosa.it

Organic Burrata Deliziosa



Organic stretched-curd stuffed with stracciatella.

Ingredients

Organic milk, organic Uht cream, acidity regulator: lactic acid, natural whey, salt, rennet. (Origin organic milk: Italy).

Packaging details

125 g. The product is packaged in polypropylene tray thermoformed with plastic film heat sealed.

Shelf life

18 days

International certifications

Organic product, VeganOk.

FELSINEOVEG

www.felsineoveg.com

Good&Green Mopur with Fairtrade Pepper



Tasty, versatile and high in proteins, Good&Green Mopur with Pepper Fairtrade is one of FelsineoVeg's organic plant-based deli slices, made with sourdough, organic flours and pepper from Fairtrade certified producers.

Ingredients

Water, gluten from wheat* 32%, durum wheat flour* 8%, chickpea flour*, extra-virgin olive oil*, natural flavourings, red beetroot powder*, salt, black pepper* 1%, sourdough 0.08%, sunflower oil*, pepper powder* 0.04%, garlic powder*. *Organic ingredients.

Packaging details

Available in a 90 g paper tray and in 2 kg half cylinders or 4 kg whole cylinders.

Shelf life

120 days

International certifications

Organic, Vegan, Fairtrade

EURO COMPANY

www.eurocompany.it

BuVé - Unique because it's made with nuts



BuVé is the premium plant-based alternative to butter made with 50% of fermented cashews. BuVé is preservatives, thickeners and additives-free and does not contain lactose, gluten, soy and palm oil. It is ideal to be spread on a slice of bread, for the preparation of desserts and to stir into risotto.

Ingredients

Cashews 50%, coconut oil, water and salt.

Packaging details

125 g. Plastic tray and lid + plastic film + paper pouch.

Shelf life

90 days

International certifications

Organic IT-BIO-009

FIOR DI LOTO

www.fiordiloto.it

Cookies filled with hazelnut cream



Two paired biscuits filled with hazelnut cream and cocoa. A perfect snack for out-of-home consumption.

Ingredients

Biscuit 70% (type "0" soft wheat flour*, cane sugar*, sunflower oil*, eggs*, powdered milk*, salt, raising agent: sodium bicarbonate), hazelnut and cocoa cream 30 % (cane sugar*, sunflower oil*, powdered milk*, hazelnut paste* 9%, cocoa butter*, cocoa powder* 7.5%, tapioca starch*, emulsifier: sunflower lecithin *, salt),*Organic

Packaging details

45 g

Shelf life

N/A

International certifications

Organic

FARMO

www.farmo.com

Organic Lentil and Chickpea Pasta



Rotini, Penne, Spaghetti and Organic Risoni made with legume flour. All naturally gluten free, they are ideal for preparing tasty and delicious dishes while offering a perfect balance of carbohydrates and proteins. Ideal for the preparation of traditional risottos and pastas, salads as well as exotic and modern recipes.

Packaging details

Rotini, Penne and Spaghetti in 250 g paper cases, Risoni in 300 g paper cases.

Shelf life

30 months

International certifications

Gluten free, Bio, Kosher Star K, Non GMOs

FIorentini ALIMENTARI

www.fiorentinalimentari.it

Pop's Pulses Mix



Crunchy triangles with 30% of an original mix of pulses (peas, beans, lentils and chickpeas): tasty, not fried, gluten-free and yeast-free, only produced with selected raw materials from organic farming. This snack is a source of fibre and protein, and it is ideal as bread substitute for aperitifs and meals, but also perfect for tasty breaks.

Ingredients

57% corn*, 30% pulses* (vegetables in variable proportion: peas*, beans*, lentils*, chickpeas*), vegetable oils* (sunflower* and corn*), peas proteins*, sea salt, natural olive flavor. *from organic farming

Packaging details

80 g, squared bottom pack

Shelf life

12 months from production

International certifications

VeganOK

PASTIFICIO ATTILIO MASTROMAURO GRANORO

www.granoro.it

Farfalle n.198 'CuoreMio Bio'



Organic durum wheat semolina pasta and barley. Product of Italy.

Ingredients

Durum wheat semolina, barley flour (25%).

Packaging details

500 g, paper bag/cellophane.

Shelf life

24 months from date of packaging

International certifications

Organic ICEA, Italian Organic

ARRIGONI BATTISTA

www.arrigoniformaggi.it

Gorgonzola PDO Bio "To serve by spoon"



A soft, blue cheese made with raw cow's whole milk. The use of organic milk helps to combine the peculiar sweetness of a creamy Gorgonzola product with an healthy living philosophy.

Ingredients

Organic milk, salt, rennet.

Packaging details

200 g fixed or random weight, thermo-sealed tray.

Shelf life

18 days

International certifications

IFS, BRC, Organic

GERMINAL GROUP

www.geminalbio.it

Organic Cookie Stick with Flakes & Fruits



A tasty and crunchy snack to carry always with you. GerMinal Bio Organic Cookie Stick with Flakes & Fruits are prepared with a rich blend of cereals and fruit which makes them a natural source of magnesium. Cookie sticks are palm oil free, dairy free, eggs free and packed in practical pocket-sized pack.

Ingredients

*Wholemeal oat flakes, *wholemeal barley flour, *sunflower seeds oil, *cane sugar, *wheat flour, *dehydrated fruit. * Organic.

Packaging details

110 g, polypropylene film + carton box

Shelf life

250 days

International certifications

EU Organic, Vegan

JOE&CO - BRAND CRUDOLIO

www.joeandco.it - www.crudolio.it

Crudolio 'Zero Sbatti'



For everyone who's always in a rush. For everyone who can't make time. For everyone who loves the 'aperitivo' with friends. Zero Sbatti is for you. Six new oil products, created for specific culinary preparations and needs: Curry, Guacamole, Hummus, Cakes, Salads & Stir-fry. To make life easier, but with extra taste.

Ingredients

Six different blends of vegetal oils and natural flavors.

Packaging details

500 ml and 250 ml dark glass bottles with aluminum cap.

Shelf life

18 months

International certifications

IFS, VeganOk, Kosher.

QUASANI SOCIETÀ AGRICOLA

www.fattoriadellamandorla.it

Mandorino



Hard paste product based on almond milk. Mandorino is characterized by a full-bodied, intense, aromatic and rightly salty organoleptic profile. It can be enjoyed alone or paired with many foods, grated on pasta or combined with fruit compotes.

Ingredients

Almond blossom* 72%, (coconut oil*, chickpea our*, potato akes*, peeled almond our* 4%, corn our*, degreased peeled almond flour* 2.6%, Italian salt, agave's syrup *), Almond emulsion* 23% (water, coconut oil *, degreased peeled almond flour* 12.1%), agar-agar (thickener), Natural aroma of organic yeast extract, Italian sea salt.* Organic. It may contain traces of sesame, peanuts and other nuts.

Packaging details

Paper, 200 g

Shelf life

180 days

International certifications

Icea Organic.

SOC. AGR. BIOFACTOR DI FAELLA GIOIA E C. S.A.S.

www.biofactor.it

Organic Classic Microwave Salted Popcorn



A practical snack, ready to eat after just a few minutes in the microwave. Available in boxes of 3 x 90 g bags, packaged in 14 item cartons.

Ingredients

Organic corn, organic shea butter, salt.

Packaging details

Boxes of 3 bags x 90 g (total net weight 270 g)

Shelf life

18 months

International certifications

Organic

CASEIFICIO BUSTI

www.caseificiobusti.it

Pecorino Marzolino Bio with Vegetable Rennet



The iconic color, the ancient recipe, the tender paste and the traditional taste, everything enclosed in this uniquely shaped lactose-free Marzolino Bio.

Ingredients

Pasteurized sheep milk*, salt, vegetable rennet (from cynara cardunculus) and lactic ferments. Surface treated with organic tomato paste.

Packaging details

1,000 Kg - 3 wheels/box

Shelf life

120 days

International certifications

CCPB, BRC Food, IFS Food

INALPI

www.inalpi.it

Formaggini Bio



Produced only with Piedmont milk and a short list of ingredients, testimony of the quality of the raw material used.

Ingredients

Milk from short supply chains with Inalpi certifications.

Packaging details

Every single snacking cheese wrapped in aluminum and encased in cardboard. BIO snacking cheese 140 g.

Shelf life

6 months.

International certifications

BRC, IFS

MASTER

www.mammaemma.it

Mamma Emma – Organic potato gnocchi



Made with fresh potatoes steam cooked in their skin, these gnocchi are made with only 3 ingredients: fresh potatoes, flour and salt. A healthy and genuine product, ideal to be cooked directly in a pan, without boiling water. Suitable for a vegan diet.

Ingredients

70% steamed potatoes, type '0' soft wheat flour, salt, sunflower seed oil.

Packaging details

Plastic bag in a cardboard box. 400 g

Shelf life

60 days

International certifications

FSSC 22000, IFS, Brogs, Smeta 4 Pillars, Icea

PRODUCTS

ACETIFICIO MENGAZZOLI

www.mengazzoli.it

Améa – Organic Apple Vinegar, Apple Balsamic Vinegar



Améa – Organic Apple Vinegar, Apple Balsamic Vinegar is obtained from a natural and static fermentation of concentrated apple juice, which gives to the product a consistent sweet-sour and fruity flavour. This apple balsamic vinegar suits perfect with rice seasoned with herbs and fruits, boiled meat and vegetables. Highly suggested on ice creams and fruit salads.

Ingredients
Concentrated organic apple juice.

Packaging details
250 ml glass bottle

Shelf life
5 years

International certifications
UNI EN ISO 22005:2007

PASTIFICIO AVESANI

www.pastificioavesani.com

Organic ravioli with grilled vegetables



Ravioli with grilled vegetables.

Ingredients
Pasta ingredients (60%): durum wheat* flour, eggs* 30%; filling (40%): ricotta* (milk whey*, salt, acidity regulator: e270), mixed grilled vegetables in different proportions* 19% (peppers*, courgettes*, aubergines*), potato flakes*, tofu* (soya* 54%, water), cheese (milk*, salt, coagulant enzyme), sunflower oil*, tomato pulp* (diced tomatoes*, tomato juice*), powdered milk*, garlic**, salt, basil**, pepper. *Organic EU agriculture. **Not organic EU agriculture

Packaging details
250 g tray.

Shelf life
45 days on delivery, 65 days from date of manufacture

International certifications
IFS, BRS, KAT, Bio.

MOLINO GRASSI

www.molinograssi.it

La Pasticceria Bio



Five specific flavors for different pastry products, all organic and made with 100% Italian wheat.

Ingredients
Wheat flour 00 Frolla, soft wheat flour 00 Croissant, soft wheat flour 00 Sfoglia, wheat flour 00 Pan di Spagna, soft wheat flour 00 Lievitati. *Organic

Packaging details
Paper bag (15 Kg/33lb)

Shelf life
8 months

International certifications
Organic, Halal, Kosher

BRIANZA SALUMI

www.granbrianza.it

Gran Brianza Bio



All of Italy's traditional charcuterie meats in a line that is 100% from organic farming. Animals are farmed in spacious, well-ventilated stalls where they are free to move around, with no antibiotics used. The range features Mortadella, Prosciutto Cotto, Coppa, Roast Turkey, Speck, Prosciutto Crudo, Salami, and Bresaola, all strictly GMO-free. No polyphosphates or milk derivatives are used in the production process.

Packaging details
Average weight: 80-100 gr (depending on product). Pack Type: paper trays with 65% plastic reduction.

Shelf life
35-75 days depending on product.

International certifications
Organic

MOLINO NALDONI

www.molinonaldoni.it

Robusta Soft Wheat Flour Type 1 Italica W300



100% Italian and organic wheat flour, W300, stone milled in the bio-dedicated mill in Marzeno (RA). Thanks to a selection of 'strong' wheat and to the stone milling, without the addition of enzymes or additives, Robusta guarantees a high leavening power and all the flavour and aroma of the bran parts of the wheat. Medium/long leavening. For unconventional bakery, pizza and pastry.

Ingredients
100% Italian and organic soft wheat.

Packaging details
Available in 25 kg paper bags.

Shelf life
180 days

International certifications
UNI EN ISO 9001, BRC Food, Organic.

RISERIA VIGNOLA GIOVANNI

www.risovignola.it

Riso Vignola Biologico - Carnaroli RisottoReis



Carnaroli is a high quality rice. The exceptional compactness of its large and long grains with a tiny central white core (known as 'perla') combined with the excellent balance between liquid binding and low starch release, make it 'the king of the Italian rice'. The organic line is perfect for a healthy and balanced diet.

Packaging details
500 g, 100% paper bag (FSC paper)

Shelf life
18 months

International certifications
Bioagricert

F.LLI OIOLI

www.oioli.it

Bio Arianna Gorgonzola organic cheese PDO



Gorgonzola is a white pulp cheese veined by green streaks (erborination), soft consistency and a characteristic smell. In the variety known as 'sweet', it features a more delicate flavor.

Ingredients

Pasteurized organic cow's milk, salt and rennet.

Packaging details

1/8 cheese about 1,5 kg. First packaging: embossed tinfoil + PS container.

Shelf life

60 days from packaging.

International certifications

GSFS BRC, IFS and for organic production with QCertifications.

SU DI TONO ORGANIC ITALIAN SUPERFOODS

www.suditono.com

Spagottimi - Organic Spaghetti of dehydrated Zucchini



Spagottimi are natural noodles of dried organic vegetables. Low in carbs, fats, calories. Naturally gluten-free.

Ingredients

100% organic dehydrated zucchini.

Packaging details

Net weight 50 g / gross weight 65 g. Stand up paper bag.

Shelf life

24 months.

International certifications

EU Organic, USDA approval, FDA approval.

TERRE DI PUGLIA

www.terredipuglia.it

Organic Tarallini



The traditional Apulian snack crumbly and tasty is now also organic. Terre di Puglia Organic Tarallini in single-dose packaging is ideal for on-the-go consumption, for a snack at any time of day, and also to be enjoyed with vegetables, soups, creams and to accompany an aperitif.

Ingredients

Organic wheat flour, organic white wine, organic extra virgin olive oil, salt.

Packaging details

40 g bags

Shelf life

12 months

International certifications

Organic ICEA

BAUER

www.bauer.it

Organic Miso Stock Cubes



Bauer has enriched the recipe of its organic vegetable stock cube with the addition of miso, made from organically grown soybeans. Bauer's Miso Bio stock cubes are ideal for preparing innovative recipes and give character to all dishes without the addition of other aromas.

Ingredients

Sea salt, non-hydrogenated vegetable oil (palm)*, dehydrated vegetables in varying proportions (potato*, carrot*, celery*, parsley*, tomato*, onion*, leek*, garlic*): 16.4%, yeast extract*: 13.2%, miso (fermented rice*, soybean*, sea salt, water): 11.5%. *From organic farming

Packaging details

Pack with 6 cubes, 60 g

Shelf life

3 years

International certifications

Quality Vegan, organic Csqa

TERRE E TRADIZIONI

www.terretradizioni.it

Organic Crunchy Pillows



From ancient Russello wheat, the Organic Crunchy Pillows are born, very thin puffy sheets, baked in the oven and then browned for a few moments in high oleic sunflower oil. A delicious but simple snack, which contains all the nutritional and organoleptic properties of ancient wheat. Made in three flavors: classic, pizza and rosemary.

Ingredients

Classic: Russello durum wheat semolina *, water, high oleic sunflower oil *, brewer's yeast, salt. (*) From organic farming.

Packaging details
Plastic (PP/5)

Shelf life

10 months

International certifications
Organic

VALLE FIORITA

www.vallefiorita.it

Focaccia alla Pala AmicoBio



Baked in the stone oven at high temperature, the Focaccia is handmade as shown by the finger marks on the surface. Before baking it is covered with extra virgin olive oil. The dough is prepared with sourdough and micro-filtered sea water to make the product light, crisp and highly digestible.

Ingredients

Soft wheat flour type '0', sourdough, microfiltered sea water, extra virgin olive oil, soft wheat germ. All the raw materials used for its preparation are organic.

Packaging details

Pack of 1 piece of 250 g. Packaged in MAP with flow pack and label, it is available both ambient and frozen.

Shelf life

60 days

International certifications
BRC, IFS, FDA, Organic.

COOPERLAT SOC. COOP. AGRICOLA

www.trevalli.cooperlat.it

Hoplà Veg&Bio Cooking Sauce



Cooking sauce made from sunflower oil 100% vegetable, organic, lactose-free, gluten-free, no hydrogenated fats, palm oil-free, no allergens.

Packaging details
200 ml, tetra crystal, an eco-friendly packaging composed of 86% of plant-based raw materials that avails itself of the international carbon trust recognition (14% less of co2 emissions compared to standard tetra briks).

Shelf life

365 days

International certifications
Organic product, VeganOk.

VR ACETI

www.remodena.com

Remodena Organic Balsamic Vinegar of Modena PGI



Naturally dense Balsamic Vinegar of Modena produced with 100% selected organic Lambrusco & Trebbiano grapes.

Ingredients

Cooked organic grape must, organic wine vinegar.

Packaging details

Glass bottle, net content 250 ml

Shelf life

5 years

International certifications

Organic, IFS Food, Usda Organic, Jas CCPB, Organic Canada.

DE CECCO

www.dececco.com

Organic Durum Wheat Semolina Pasta



De Cecco's Organic Pasta is made with the best organic durum wheat, carefully ground to achieve a fresh semolina with unique qualities that remain intact during the slow, low-temperature drying. The bronze-drawing process, which allows the pasta to capture the taste of each sauce and remain intact during cooking, will satisfy even the most demanding customers.

Ingredients

Organic durum wheat semolina

Packaging details

250 and 500 g boxes - 3 kg bags

Shelf life

36 months

International certifications

Organic, IFS, BRC, EPD, HACCP, ISO 9001:2015, SA8000, ISO 14001:2015 Environmental Management System standard, Halal, Kosher

SGAMBARO

www.sgambaro.it

Spelt, Lentils and Quinoa Spaghetti, Sgambaro Bio Label



A high protein content pasta, with a low glycaemic index, produced with spelt (an ancient cereal), lentils (a legume), and quinoa (an herbaceous plant). It has a high protein content (18%) and is free from additives.

Ingredients

Spelt flour (wheat) 70%, lentil flour 20%, quinoa flour 5%, pea protein isolate 5%.

Packaging details

500 g

Shelf life

3 years from production.

International certifications

ICEA Organic, BRC Level A, IFS Food, Star-K Kosher, Halal.



Naturally organic Italian charcuterie

All Italy's traditional charcuterie meats in a line that is 100% from organic farming. Animals are farmed in spacious, well-ventilated stalls where they are free to move around, with no antibiotics used. The range features mortadella, prosciutto cotto, coppa, roast turkey, speck, prosciutto crudo, salami, and bresaola, all strictly GMO-free. No polyphosphates or milk derivatives are used in the production process.



Visit us at **BIOFACH** 14-17 February 2023
Hall 4 - Stand 4-140

www.granbrianza.it