

THE ITALIAN FOOD MAGAZINE

BUYER'S • GUIDE

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EXCLUSIVE

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MAGAZINE

EDITORIAL

by Federico Robbe

Italian Sounding: where does the truth lie?

Talking about Italian Sounding is a bit like talking about the moon landing or the fact that the Earth is round. I'll explain myself better: whomever even tries to raise any doubts about its truthfulness, is held up as crazy. And in this case, also as an enemy of the state.

But there is nothing new in this, for a decade now it has been at the core of a great number of observatories and associations debating how to strengthen Italian exports. It is also no wonder that it is not clear how much such a phenomenon is actually worth: 50, 60, 90, 120 billion? We all agree that it is impossible to calculate it accurately. Yet, how is it possible that to some it amounts to 60 billion and according to others it is actually even double? It's an open question. But apart from this trifle – what's a 60-billion-euro difference after all? – the real matter lies elsewhere: usually such a practice is condemned, deemed to be a 'theft' perpetrated by fake Italian goods around the world.

But is it actually true? In order to answer, first and foremost we must recall that the agri-food export amounted to approximately 59 billion euro in 2022 (Source: The European House – Ambrosetti). An increase by almost 80% compared to 10 years ago, whereas the Italian Sounding at that time also accounted for 60 billion, which says a lot about how the infamous 'theft' is calculated.

The Italian Sounding phenomenon, also based on data by Ambrosetti, is mostly widespread in the US with a business worth 3.5 billion euro, followed by Germany at 3.4 billion, the UK at 2 billion, France at 1.2 billion, Japan at 532 million and so on.

In those countries there's a broad-based distribution of non-Italian products that claim to be made-in-Italy specialties. Take,

for instance, the famous Parmesan, guilty of stealing shares from Parmigiano Reggiano and Grana Padano. In the category, on average, Italian Sounding cheese accounts for 61% of the shelves, whereas PDOs and 'real Italians' account for 39%. Yet these products do not even begin to compare to Italian ones in terms of taste and production costs. Parmesan is softer, smaller in size, less aged and cheaper than our PDOs. Raw material is more inexpensive and the processing is easier, moreover transport costs are cut. The price factor, indeed, plays a crucial role: Italian Sounding products cost 69% less in the UK and Germany, 65% less in Belgium and 50% in China. Hence the real question is: if Parmesan sales were to be replaced by Parmigiano Reggiano or Grana Padano ones, how many cows would it be necessary to breed in Pianura Padana? PDOs have objective limits posed by the quantity of raw material available, and the Italian industry has high quality and price standards. Moral of the story: foreign demand would be impossible to satisfy. It's almost the same if we consider salami (58% share of Italian Sounding on the shelves), Prosecco (58%), prosciutto (59%) and extra virgin olive oil (57%). Taking into account the GIs counterfeits, rightly punished by the law, even if we were to make a clean sweep of Italian Sounding products, foreign consumers would buy other goods with similar prices. On the matter of imitations, it takes consistency and reciprocity: if those exploiting Italian notoriety should be stopped, the same should be true for Italian productions that hark back to foreign delicacies. Hence, no more pancakes, pulled pork, ribs, sushi or poke. All shares stolen from foreign companies? Come on, let's get real. And let's try instead to facilitate export in little-explored markets by simplifying red tape and working on programs supporting and promoting Italian excellences.

Italian Sounding: quanto c'è di vero?

Il tema dell'Italian Sounding è ormai un po' come lo sbarco sulla Luna o il fatto che la Terra sia rotonda. Mi spiego: chi prova anche solo a instillare qualche dubbio sulla sua veridicità, viene dato per matto. E in questo caso, anche con l'aggravante di essere nemico della Patria.

La vicenda non è certo nuova: se ne è discusso al recente Forum Food&Beverage di The European House Ambrosetti e da oltre un decennio è diventata il mantra di osservatori di varia estrazione e associazioni (in primis Coldiretti) che dibattono su come far crescere il nostro export.

Non è una novità neanche il balletto di cifre su quanto valga effettivamente: 50, 60, 90, 120 miliardi? Non si sa. Calcolarlo con precisione è impossibile, d'accordo. Ma può essere che secondo alcuni valga 60 miliardi e secondo altri addirittura il doppio? La domanda resta aperta. Ma a parte queste quisquie – che saranno mai 60 miliardi di differenza – il vero tema è un altro: di solito si condanna questa pratica equiparandola a uno 'scippo' perpetrato dai falsi prodotti italiani in giro per il mondo.

Ma è davvero così? Per tentare di rispondere, intanto bisogna dire che l'export agroalimentare vale circa 59 miliardi di euro nel 2022 (Fonte: The European House – Ambrosetti). L'incremento rispetto a 10 anni fa è di circa l'80%, mentre l'Italian Sounding stimato all'epoca era sempre 60 miliardi: un fatto curioso che la dice lunga sulle modalità di calcolo del famigerato 'scippo'.

Il fenomeno dell'Italian Sounding, sempre secondo dati Ambrosetti, vede in testa gli Usa con un business da 3,5 miliardi di euro, seguiti dalla Germania con 3,4 miliardi, dal Regno Unito con 2 miliardi, dalla Francia con 1,2 miliardi, dal Giappone con 532 milioni e altri.

In questi mercati, secondo la vulgata, ci sarebbe una distribuzione capillare di prodotti non italiani che si spacciano per eccellenze tricolori. Prendiamo l'arcinoto Parmesan, reo di sottrarre spazio al Parmigiano Reggiano e al Grana Padano. Nella categoria, in media, il formaggio Italian Sounding occupa il 61% degli scaffali, mentre i Dop e i 'veri italiani' occupano il 39%. Ma sono prodotti neanche lontanamente comparabili in termini di gusto e costi di produzione. Il Parmesan è più morbido, di dimensioni più piccole, meno stagionato e più economico delle nostre Dop. La materia prima è più a buon mercato e la lavorazione meno impegnativa, inoltre si abbattano i costi di trasporto.

Proprio il fattore prezzo gioca un ruolo cruciale: i prodotti Italian Sounding costano il 69% in meno in Regno Unito e Germania, il 65% in Belgio e il 50% in Cina. Ma allora bisogna chiedersi: se le vendite di Parmesan dovessero essere soppiantate da quelle di Parmigiano o Grana Padano, quante vacche dovremmo allevare in Pianura Padana? Le Dop hanno dei limiti oggettivi sulla quantità di materia prima disponibile, e l'industria italiana ha una potenza di fuoco ridotta, oltre che elevati standard qualitativi e di prezzo. Morale: quella estera resterebbe una domanda impossibile da soddisfare.

Lo scenario non cambia granché se consideriamo il salame (58% quota Italian Sounding a scaffale), il Prosecco (58%), il prosciutto (59%) e l'olio extra-vergine di oliva (57%). Al netto delle contraffazioni delle Indicazioni geografiche, giustamente punite dalla legge, anche se si facesse piazza pulita dei prodotti Italian Sounding, i consumatori stranieri comprenderebbero altre referenze con prezzi simili. E poi, in tema di imitazioni, ci vuole coerenza e reciprocità: se chi sfrutta la notorietà italiana va fermato, dovrebbe valere lo stesso anche per le produzioni di casa nostra che strizzano l'occhio alle specialità straniere. Dunque stop a pancake, pulled pork, ribs di maiale, sushi o poke. Tutto spazio rubato a fior fior di aziende estere? Suvvia, siamo seri. E cerchiamo di facilitare l'export nei mercati ancora poco esplorati lavorando sulla semplificazione della burocrazia e sui programmi di promozione e valorizzazione del buon cibo italiano.

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NEWS

PEANUT BUTTER NUTELLA, FERRERO CONFIRMS: "IN-MARKET TEST IN THE US"

On the shelves of some American supermarkets the new Nutella Peanut can be found, the peanut butter version of the famous spreadable cream. As the multinational from Alba (Cuneo) confirmed to The Italian Food Magazine, "an in-market test is currently underway, with limited distribution only in the US". Peanut butter products are very popular in the country, and therefore this new launch could be greatly appreciated. We will be waiting for the company's next steps to understand if the product will be launched on a large scale.



Nutella al burro di arachidi, Ferrero conferma: "In-market test negli Usa"

Sugli scaffali di alcuni supermercati americani si può trovare Nutella Peanut, la versione al burro di arachidi della famosa crema spalmabile. Come conferma a The Italian Food Magazine la multinazionale di Alba (Cuneo), è attualmente in corso "un in-market test, con limitata distribuzione solo negli Usa". Negli Stati Uniti i prodotti a base di arachidi sono molto popolari. Ecco allora che il lancio della nuova crema potrebbe essere molto apprezzato. Attendiamo ora le prossime mosse della multinazionale che potrebbe lanciare il prodotto su larga scala a breve.

SALE OF CULTURED MEAT: IN SWITZERLAND THE FIRST EU APPLICATION

Switzerland is preparing to be the first country in Europe to authorize the public sale of cultured meat. The Israeli company Aleph Farms, specialized in cellular agriculture, has indeed submitted an application for regulatory approval to the Swiss Federal Office for Food Safety and Veterinary (FSVO) for the sale on the Swiss market of cultivated beef steaks under the branding of Aleph Cuts. The initiative was undertaken in cooperation with Swiss retail giant Migros, an investor in Aleph Farms since 2019. In case of approval, it will probably initially only be available in high-end restaurants, explained Tristan Cerf, spokesperson for Migros supermarkets. Due to the high cost, sale at supermarket is unlikely before 2030.



Carne coltivata: in Svizzera la prima richiesta di autorizzazione alla vendita

La Svizzera si prepara ad essere il primo Paese in Europa ad autorizzare la vendita al pubblico della carne coltivata. L'azienda israeliana Aleph Farms, specializzata nella nell'agricoltura cellulare, ha infatti presentato una richiesta di approvazione all'Ufficio federale svizzero per la sicurezza alimentare e veterinaria per la commercializzazione dei prodotti di carne coltivata 'Aleph Cuts' sul mercato elvetico. L'iniziativa è stata intrapresa insieme a Migros, tra le principali catene operanti in Svizzera, che dal 2019 investe nell'azienda israeliana. Secondo Tristan Cerf, portavoce di Migros, il prodotto potrebbe inizialmente essere commercializzato nel settore dell'alta gastronomia. A causa dell'elevato costo di vendita, infatti, potrebbe non essere disponibile nei supermercati prima del 2030.

SIGMA ALIMENTOS SOLD 100% OF CESARE FIORUCCI SPA

The Mexican multinational food company Sigma Alimentos, through the holding Campofrio Food Group, sold its operatins in Italy and Germany by transferring 100% of Cesare Fiorucci Spa, a food company founded in Norcia in 1850 and specialized in the production of deli meats, which entered Sigma Alimentos in 2015. Now, it passes under the control of Fiorucci Holding, financial company controlled by the German Navigator Group and the Irish White Park Capital, thus returning 100% European. In addition to the Fiorucci brand, Fiorucci Food Service, Luigi Ugolotti (producer of meats and deli meats) and Cesare Fiorucci Deutschland have been also transferred to Fiorucci Holding, together with two production plants in Santa Palomba (Rome) and Lesignano de' Bagni (Parma).

ITALIAN AGRI-FOOD EXPORTS RISE 9.5% IN THE FIRST QUARTER OF 2023

In the first quarter of 2023, Italian agri-food exports recorded a +9.5% yoy growth, as the latest Monitor on the agri-food districts edited by the Studies and Research Department of Intesa Sanpaolo reveals. Between January and March, the 51 districts monitored totaled 6.6 billion euro, up 580 million with respect the same period in 2022. If we look at the sectors, wine leads the rank for exported values, exceeding 1.5 billion euro (+5%), led by the Prosecco district of Conegliano Valdobbiadene, which gives the greatest contribution growing +12.6%. The quarter was positive also for pasta and confectionery, at 1.1 billion (+11.9%). Preserves and meats/deli meats performed well too, with exports rising by 19.8% and 18.8% respectively. As for cheese, buffalo mozzarella from Campania achieves the strongest growth on foreign markets (+31.9%). While if we look at rice (48 million more than in 2022), the best results come from the Vercelli and Pavia districts. The top destinations of Italian agri-food products are Germany (+13%), especially for wines and preserves; the US (+9%), mainly for wine, pasta, confectionery and olive oil; and France (+16.9%), especially for dairy products and cheeses, meats and deli meats.



Export agroalimentare italiano: nel primo trimestre 2023, +9,5%

L'export agroalimentare italiano ha registrato, nel primo trimestre 2023, una crescita del +9,5% tendenziale. A rilevarlo è l'ultimo 'Monitor dei distretti agroalimentari' curato dalla direzione Studi e Ricerche di Intesa Sanpaolo. I 51 distretti monitorati hanno totalizzato, tra gennaio e marzo, 6,6 miliardi di euro, 580 milioni in più rispetto allo stesso periodo del 2022. Se guardiamo ai settori, il primo per valori esportati è quello del vino che supera 1,5 miliardi di euro, +5%, guidato dal distretto del prosecco di Conegliano Valdobbiadene, che dà il maggior contributo con un +12,6%. Positivo il trimestre per la filiera della pasta e dei dolci, che ha superato 1,1 miliardi (+11,9%). Bene anche il settore delle conserve - ha esportato per 128 milioni (+19,8%) -, e quello delle carni e dei salumi (+18,8%). Sul fronte dei formaggi, la mozzarella di bufala campana è il prodotto con le più alte performance sui mercati esteri (+31,9%). Mentre se guardiamo al riso (che ha realizzato oltre 48 milioni in più rispetto al 2022), i risultati migliori arrivano dal riso di Vercelli e dal riso di Pavia. Le principali destinazioni dell'agroalimentare italiano sono: Germania (+13%), che acquista principalmente prodotti agricoli, vini e conserve; Usa (+9%), che compra per lo più vini, pasta, dolci e olio; e Francia (+16,9%), che acquista principalmente latticini e formaggi, carni e salumi.

Sigma Alimentos cede il 100% della Cesare Fiorucci Spa

La multinazionale messicana Sigma Alimentos, tramite la holding Campofrio Food Group, ha venduto le proprie attività in Italia e Germania cedendo il 100% della Cesare Fiorucci Spa, azienda alimentare fondata a Norcia nel 1850 specializzata nella produzione di salumi. Il salumificio, che era entrato a far parte di Sigma Alimentos nel 2015, passa ora sotto il controllo totale di Fiorucci Holding, la società finanziaria controllata dal gruppo tedesco Navigator Group e dall'irlandese White Park Capital. Tornando così a essere al 100% europea. Oltre al brand Fiorucci, vengono ceduti a Fiorucci Holding anche Fiorucci Food Service, Luigi Ugolotti (produttore di carni e salumi) e Cesare Fiorucci Deutschland. Insieme a due stabilimenti di produzione a Santa Palomba (Roma) e Lesignano de' Bagni (Parma).

ITALIAN CHEESE EXPORTS: +6.4% IN VOLUME IN THE EU AND +19.3% WORLDWIDE

In the first four months of 2023, Italian cheese exports mark a 6.4% growth in volume toward EU countries, and a 19.3% growth globally. The value growth stands at +21.7%. According to Istat data, reported by InsiderDairy, fresh (+10.4%) and grated (+5.7%) cheeses are the ones growing the most by volume. Poland is the country that records the greatest volume growth (+23.9%), followed by Spain (+14.2%), and Germany (+9.5%). France, the largest EU importer of Italian cheeses, posted a 5.8% growth. In the rest of the world, the US stands out (+1.6% in value, driven by mozzarella, +54.8%, and Gorgonzola, +42%) and Japan (+6.5% in value).

SALUMIFICIO COATI: PRODUCTION BACK AT FULL CAPACITY AFTER THE FIRE

A few months after the disastrous fire that hit the Salumificio F.lli Coati, the company's production is back at full speed at the Santa Lucia di Pescantina (Verona) plant and all of the 300 employees have been reintegrated. "Machines can be bought back, but it's the people that make a difference. [...] It was our employees and partners that made us understand that we shouldn't give up", Beatrice Coati, CEO of the deli meat company, said in an interview at the Italian newspaper L'Arena. This successful comeback was made possible also thanks to the agreement with the Pavoncelli deli meat producer that, over the past months, has made available spaces, equipment and machinery to integrate Coati's production. A strong investments for the new company headquarters in Santa Lucia di Pescantina was also made: a 15 million invest plan to renovate the production facilities.

Salumificio Coati: dopo l'incendio, la produzione è ripartita al 100%

Dopo pochi mesi dal disastroso incendio che ha colpito il Salumificio F.lli Coati, l'azienda riparte a pieno ritmo nello stabilimento a Santa Lucia di Pescantina (Vr) e reintegra tutti i 300 dipendenti. "Le macchine si ricomprano, ma sono le persone che fanno la differenza. [...] Sono stati i nostri dipendenti e collaboratori a farci capire che non dovevamo arrenderci", commenta l'Ad del salumificio, Beatrice Coati, in un'intervista pubblicata dal quotidiano L'Arena. Artefice della buona riuscita è stato poi l'accordo con il salumificio Pavoncelli che, nei mesi scorsi, ha messo a disposizione spazi, mezzi e macchinari per integrare la produzione del salumificio Coati. Non sono mancati anche importanti investimenti per il nuovo quartier generale dell'azienda, a Santa Lucia di Pescantina: un piano di oltre 15 milioni da investire in macchinari per rinnovare l'impianto produttivo.

Export formaggi italiani: +6,4% a volume in Ue e +19,3% nel mondo

Nei primi quattro mesi del 2023, i formaggi italiani segnano un +6,4% a volume nell'export verso i Paesi europei, e un +19,3% a livello globale. La crescita a valore è del +21,7%. Secondo i dati Istat, riportati da InsiderDairy, a riscuotere il maggiore successo sono i freschi (+10,4% a volume) e i grattugiati (+5,7% a volume). La Polonia è il Paese che registra la maggiore crescita dei volumi (+23,9%), seguita dalla Spagna (+14,2%). La Germania segna un +9,5%. La Francia, maggiore importatore europeo dei formaggi italiani, cresce a volume del 5,8%. Nel resto del mondo, spiccano gli Usa (+1,6% a valore, trainati da mozzarella, +54,8%, e Gorgonzola, +42%) e il Giappone (+6,5% a valore).

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THE INTERVIEW



Thailand, the “kitchen of the world”

The love of beauty and a genuine passion for truffles. The discovery of “Italian-style” ice cream and the boom in (Russian) tourism. Today’s Thai food market in an interview with Giacomo Iobizzi, secretary general of the Thai-Italian Chamber of Commerce (TICC) in Bangkok.

It certainly cannot be defined as a new market, given that for years Thailand has been an essential crossroads for Italian food & beverage heading East. This is also true thanks to the catering and hotel industry, which is flourishing thanks to its historically highly-developed tourism. However, this country – as well as its consumers – has peculiarities that Italian companies exporting there should seriously take into consideration. The secretary general of the TICC, the Thai-Italian Chamber of Commerce, tells us all about it.

How much does Thailand depend on food imports?

Thailand is actually a major producer and exporter, so much so that the Thais themselves call it the “kitchen of the world”. Just think of sugar, rice, and fish. However, it is certainly also a big importer. In 2021, imports from Italy generated a business worth 76 dollars million for food & beverage.

What are the most imported products?

Obviously, the most famous made-in-Italy products abroad: pasta, oil, wine, dairy products and, until recently, cured meats. The ban on cured meats, imposed after the African Swine Fever caused alarm in Italy, is still in force. Once introduced, the ban is valid for three months and can only be lifted before a new quarter begins. In any case, we hope that everything will be resolved soon, not least because the market here was thriving...

What were the consequences of this ban?

The Italian products, which controlled the market,

have been in many cases replaced by French and Spanish alternatives, which are now well-positioned. In particular, in the case of Spain, there used to be only jamón ibérico, and now there is a wide range of cured sausages and other charcuterie products.

In general, how does the Italian agri-food industry compare to its competitors?

When it comes to cuisine, the Japanese one is the most popular because it is simple and light. Italian cuisine, on the other hand, is second in the preferences of the Thais, who consider it very tasty and accessible. It is not a chance that ALMA's first International School of Italian Cuisine abroad opened here in Bangkok in 2022.

And what about products?

If we talk about large-scale distribution, Italian products are everywhere. And yet, in many cases, they suffer from a higher price positioning than other imported products. I am thinking of oil, the price of which is not competitive with Spain: on average, Italian oil costs more than twice as much, even when it is made with olives of European origin.

For which other products are we uncompetitive?

Wine. However, in this



Giacomo Iobizzi

case, other European suppliers share the same problem.

What is the reason for this?

Wine imported from Europe is more expensive because it is subject to a 390% tax burden, including duties and other taxes.

And what about non-European wine?

Thailand has signed preferential trade agreements with some specific countries. The ranking of the major suppliers sees France in first place – which, despite the duties, is advantaged by the excellent position it has gained in the country – and in second place, Australia and New Zealand, favoured by taxation, which allows them to have a much more attractive final price. Chile and South Africa, also with privileged trade relations, are in third and fourth place. Italy is only fifth, although it is well-placed overall.

Why is the tax burden so high for wines and spirits?

First of all, it is a matter of protectionism towards the domestic market. A lot of whiskey and rum is produced from sugar cane here. There are also strong interests in the beer market. The high duties consequently allow for less competition. And then there is the issue of health: in

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THE INTERVIEW

Thailand, there is a high rate of deaths from road accidents related to alcohol consumption, especially during important national holidays, such as the Thai New Year. Therefore, the government has chosen to keep prices high, along with other measures, to try to tackle the problem.

What other actions have been taken?

It is very difficult to do promotion and marketing for alcohol products because it is forbidden to advertise them, even on social networks. There are also specific time slots for serving and selling alcohol. Customs duties are therefore only one of the many obstacles.

Is there still room for growth?

Absolutely. The sales of wines from Tuscany, Piedmont and Veneto are strong, and importers are always looking for best sellers. In addition, a brand new market is opening up, with wine in cartons and canned cocktails. This option is very popular with bar and hotel managers, as it makes it easier to understand and analyse the business food cost and, in addition, thanks to the ready-to-drink solution, there is no need for highly qualified staff. In this case, the high import cost is offset by these benefits.

Talking about successful products, what is the Thai consumer looking for today?

Definitely colatura di alici, which not everyone in Italy knows or uses, but since it is very similar to Thai fish sauce, it is very popular, as is balsamic vinegar. Another successful product is plant milk, based on almonds or rice. Truffles are also a very popular product among the Thais, and they can be found everywhere: crisps, pizza, and even ice cream. Here, "Italian-style" ice cream is definitely one of the current trends.

What is "Italian-style ice cream"?

It is the opposite of the American-style ice cream, which has a thicker and less tasty consistency, and was imported to Thailand by the Swensen's chain – part of the Minor Group, which also owns NH Hotels. However, the ice cream culture is different: there are no ice cream parlours, with machines and a counter, like in Italy. Ice cream is pre-packaged in tubs and sold at kiosks located in transit places, such as shopping centres, or via e-commerce. Large companies, for example, place big orders for the office: it is a booming business. What is missing, but now starting to appear, are pastry shops, which satisfy both the Thais' passion for buns and croissants, and also their love for panettone, which is called "Christmas Cake" here.

Do Thais love panettone?

They are crazy about it. And this brings me to another topic that I think is strategic for the future of Italian agribusiness in Thailand, which is co-branding.

Can you explain further?

After the pandemic, a Thai importer reached out to us because he was interested in the panettone made by Dolce&Gabbana and Fiasconaro. He imported a large amount of them and sold as many, even though the selling price was quite high. The same goes for the pasta that Dolce&Gabbana made together with Di Martino. The truth is that Thai consumers are willing to spend a great deal on a product if it is also aesthetically appealing, and precious. They love the use of gold, red, black and silver in packaging. However, the packaging of Italian products is often too simple, and the message they carry is too confusing, with much text and sometimes without the basic information. An example of this is the packaging of organic products: Thai consumers are willing to pay the extra price for organic products, but this has to be justified by appealing packaging. Furthermore, on the packaging of many Italian products, it is even difficult to find the words "Made in Italy" or just an Italian flag. On the contrary, Italian-sounding product packs usually have these characteristics. So we need engaging, valuable products that catch the eye of consumers. That way, they will be willing to spend a little more...

What is the right sales channel for these products?

Certainly chains like Tops – part of the Central group, which in Italy owns Rinascente. It is an incredible showcase of high-quality, upscale products from all over the world. It is a bit like an acid test for new products to be launched on

the market: those that work, that consumers like, are then confirmed.

You mentioned the pandemic earlier. Have there been any significant changes in the market as a result of Covid-19 and the armed conflict in Ukraine?

There has definitely been a major change: between January and July, more than 600,000 Russian tourists arrived in Thailand. As a consequence, restaurants, villages, and hotels with Russian signs are springing up, especially in Phuket.

All the tourists who no longer come to Europe...

Exactly. Thailand has always been a popular tourist destination, which means there are plenty of restaurants and hotels. Because of the pandemic, this market has faced a serious crisis, and many small businesses have been taken over by big groups. Unfortunately, many Italian restaurants have also closed, but the restaurant market is recovering well, especially fine dining restaurants. Three or four years ago, a Thai edition of the Michelin Guide was also introduced, and it is achieving great success. As a result, all this new supply allows us to import many different types of products – from fast-moving consumer goods for large-scale retail chains to delicacies for starred restaurants – with great opportunities for Italian companies.

On your part, what initiatives do you have in the pipeline?

In mid-October, we will organise an event with Rustichella d'Abruzzo to showcase the many types of pasta that are part of the Italian tradition, with the participation of some chefs who will prepare typical dishes from different regions. These kinds of educational events, which are aimed at industry professionals, chefs and the press, are always very popular. We are also working on consumer communication, once again from an educational point of view. We recently launched a webinar on the Italian regions. This is because Thai people rarely know the diversity of our country's territories and traditions, and when they discover them, they are always fascinated. There is still much room for storytelling about Italy and its products. Thais, after all, are curious consumers, eager to discover and try new products.

Thailandia, la "cucina del mondo"

L'amore per il bello è una passione smodata per il tartufo. La scoperta del gelato 'all'italiana' e il boom del turismo (russo). Il mercato alimentare thailandese di oggi in un'intervista a Giacomo Iobizzi, segretario generale della Camera di commercio italiana a Bangkok (Ticc).

end

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LOOK AT
THE SITE

Doing business in the Philippines

The cultural background, the opportunities, and the regulations governing trade in food and beverage. The meeting with Sergio Boero, president of the Italian Chamber of Commerce in Manila.

It is one of the fastest growing Asian economies, as well as an ideal gateway to the whole Asean market. It has a young population (average age 24) and with an ever growing purchasing power, as the 5.2% increase in average consumer expenditure recorded in 2022 proves. Expenditures that, in the case of imported food, are increasingly focused on premium, innovative goods with a healthy nutritional profile. For all these reasons and more, the Philippine market is a perfect ecosystem for Italian companies that look to the East with interest, and that find in Manila's Italian Chamber of Commerce (ICCP) a precious ally. Last July 5th, in the Blossom offices in Seregno (Lombardy,

province of Monza and Brianza), our publishing group organized a private meeting among some Italian food brands - from deli meats to cheeses, from pasta to wine, from preserves to confectionery and bakery - and the president of ICCPI, Sergio Boero, who since 2011 has been supporting Italian companies doing business in the region.

The Philippines, yesterday and today

Unlike other Asian countries, the citizens of the Philippines have a food culture and a lifestyle very similar to the Western one, due to a long colonial domination. The very name of Philippines comes from the Spanish

colonizers who took power in the mid-16th Century and thus renamed the archipelago in the name of Philip II, King of Spain. Their dominion over the territory continued until the end of the 19th Century, when the colony was 'bought' by the Americans, who controlled it until the World War II. The legacies of this Century-long history are still evident today in many aspects of people's daily life, from the language (everyone speaks a perfect English) to religion (most Filipinos are Catholic) up to eating habits and the deep-rooted presence - especially in the capital Manila - of the leading US fast food brands. The most important fast food chain of the country, a true local institution, is called Jollibee.

The new opportunities for f&b

Over the last years, Manila is progressively turning into the new gambling capital of Asia. A very widespread form of entertainment in this part

of the world and which, until recently, had its hub in China. Three casinos have opened in Manila recently and four more are under construction. Every weekend these places attract millions of visitors from the mainland and this opens up great opportunities for Italian food & beverage companies too. The heart of the casinos are indeed the slots and the table games, but all around restaurants and clubs, and therefore food specialties, wine and spirits.

What f&b producers need to evaluate carefully, when deciding to start a business in the country, is to develop a storytelling able to communicate the added values of Italian productions: the centuries-old history of some products and brands; the goodness of the farming and breeding techniques; the first quality ingredients used and the long and skilful processes implemented. The rest is up to the 'made in Italy' brand: all over the world a mark of quality and excellence.

Fare business nelle Filippine

Il mercato, le opportunità per il food & beverage, gli aspetti normativi per l'export nel Paese. L'incontro con Sergio Boero, presidente della Camera di commercio italiana a Manila, lo scorso 6 luglio negli uffici di Blossom di Seregno.

THE 'ITALIAN APERITIVO' BY ICCPI

To stimulate and nurture the curiosity of both operators and consumers and help spread the knowledge of Italian f&b products, the Italian Chamber of Commerce in the Philippines has created a very appreciated format of events: the 'Aperitivo italiano'. Held at the New World Hotel Makati of Manila, this premier networking event brought together members, associates, and partners of the Philippine-Italian business community for an unforgettable evening of authentic aperitivo culture, delectable Italian cuisine, and exquisite wines imported directly from Apulia. A selection of renowned brands such as Agricola Bruno, Gioiella, Sinisi, Tenuta Viglione, Eatria, and Tarallificio Recchia were proudly presented, offering guests an opportunity to savor the authentic flavors of Italy. The social event was only the final part of a very busy day, with more than 20 B2B meetings organized with importers, distributors, and buyers in the morning.

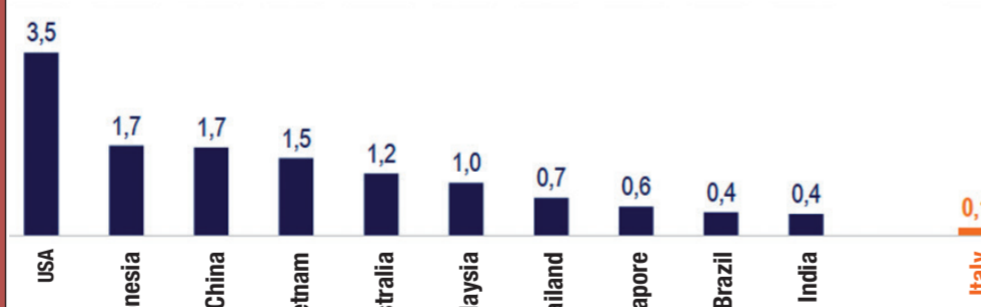


From left: Gabrielle Hahn-Lopez (ICCP), Tiffy King (Gucci), Melanie Peguinho (Gucci), Ruenruedee Prachayaphruetand (Tenuta Viglione) and Bea Leosala (ICCP).



THE F&B TRADE IN A NUTSHELL

THE 10 LARGEST F&B SUPPLIERS IN THE PHILIPPINES 2021 - BLN DOLLARS



Source: The European House - Ambrosetti

The Philippines is a net importer of goods and in 2021 it reported a trade balance of -49.8 billion dollars. Of this value, agri-food imports are worth 16.6 billion, equal to 13.4% of total imports. In a context of strong dependence on foreign countries, Italian exports to the Philippines - considering all the products of the manufacturing industry - only amount to 890 million dollars: a 0.7% share of the total, thus resulting as the 19th trading partner. Considering agri-food products only, Italy ranks as the 20th major supplier, covering 0.9% of the total, for a value of about 0.1 billion dollars. Even if the country's leading suppliers are the United States (1st with 3.5 billion in 2021), Italy's neighboring countries - namely Spain and France, at 12th and 17th place respectively - are far better positioned.



Sergio Boero during the event held on July the 5th



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DELI MEATS

Fontana Ermes: navigating challenges and achieving success

Despite the challenges faced between 2020 and 2022, the company forged a resolute path of growth, with a steadfast commitment to quality and innovation.

The three-year period of 2020-2022 was demanding and full of challenges for the deli meat industry. The sharp increases recorded in the prices of raw materials and energy have led to moments of uncertainty about the future of the sector and its ability to withstand the burden of unprecedented production costs.

In this scenario, the experience of a company with a strong international presence like Fontana Ermes - founded in the late 1950s by Ermes Fontana and among the major producers of PDO Parma Ham - helps to better comprehend the current market scenario and its potential future developments.

"Maintaining the highest production rates was both a necessity, in order to distribute the increase in production costs more efficiently, and a challenge, as we had no guarantee of recovering these costs through sales," the company explains.

"During that challenging period, we received confirmation of how crucial it is to continue investing in the company's infrastructure. Therefore, for over 60 years, we have consistently updated our production departments, enhancing them in terms of quality, efficiency, and energy consumption. Since 1959, we have operated within a single production unit that has undergone continuous refurbishment, ensuring it remains technologically advanced, while also striving to uphold elevated quality and production standards."

The evolution continues

This strategy, coupled with continuous investments, enabled Fontana Ermes to navigate and overcome a challenging period. It also inspired the company to persist in its efficiency and development plans. The company



highlights, "Today, we find ourselves in the midst of further evolution. The challenges of the past three years have driven us to implement a series of investments aimed at enhancing the energy efficiency of our factory. Initially, we adopted cogeneration technology to harness the heat generated by our manufacturing processes and convert it into electricity. More recently, we have made an investment in a photovoltaic system that will span our entire facility.

Additionally, we have bolstered the thermal insulation capabilities of our curing chambers and refrigeration rooms to minimize heat loss and energy dissipation."

Emphasis on Quality and Reliability

This business strategy yielded highly positive outcomes. "From a financial perspective, our company is currently experiencing a very favorable trend," the company explains. "After concluding

2021 with a turnover exceeding 50 million euros, the figure surpassed 60 million euros in 2022. The initial half of 2023 continued to exhibit promising signs, forecasting annual growth rates consistent with prior years."

As a result of these accomplishments, Fontana Ermes is looking to enhance its production capacity by investing in an additional expansion. This initiative will strengthen the manufacturing of both cured and cooked deli meat products. The company adds, "Over the years, we have honed our expertise in these product categories, which are highly esteemed and sought after by our loyal customers. This recognition is due to the adherence to high-quality standards, unwavering reliability, and our extensive range of diverse and comprehensive products."

The short supply chain

The company's growth strategy led to the establishment of a short supply chain that, within a single production unit, allows full control over all transformation processes: "Within our facility, we can cure, debone, cook, select, and slice all the traditional Italian charcuterie products, guaranteeing their quality and providing our customers with a comprehensive and tailor-made service. We can assert that the three-year period of 2020-2022 posed significant challenges for the deli meats industry; however, it also brought substantial growth to our company. Thanks to continuous investments, we have successfully navigated through these difficult times and consolidated our market position. We are confident that this positive trend will continue in the years ahead, thanks to our unwavering commitment to quality and innovation."

Fontana Ermes: un triennio ricco di sfide e successi

Il periodo 2020-2022 è stato intenso e non privo di criticità. Ma l'azienda è riuscita a trovare la sua strada e a crescere. Puntando su innovazione e alta qualità.

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THE INTERVIEW

www.salumisorrentino.com

Salumificio Sorrentino taking over the world

In the last 20 years, foreign sales of the Abruzzo-based firm have sharply increased. By virtue of the family at the helm of the company and the dynamism of the export manager, Americo Liberato. Who recalls the milestones of a success story.



Il Salumificio Sorrentino alla conquista del mondo

Negli ultimi 20 anni le vendite all'estero di Salumificio Sorrentino sono cresciute esponenzialmente. Merito della famiglia alla guida dell'azienda abruzzese e del dinamismo dell'export manager, Americo Liberato. Che ci racconta le tappe di una storia di successo.

AMERICO LIBERATO E IL CASE HISTORY DEL SALUMIFICIO SORRENTINO



Maybe it's due to the rare combination of first and last name, or to the astonishing ability to establish a direct connection with whomever he meets, the fact remains that it is impossible not to take a liking to Americo Liberato. Born and raised in Abruzzo, Liberato has been export manager for 20 years at Salumificio Sorrentino, and he has been involved in the phenomenal development of the company overseas.

The first question is a must: can you tell us about your career? And how did the collaboration with Salumificio Sorrentino come about?

It all started in high school: Martino Sorrentino's class was next to mine. When I was attending the last year, he was in his third year, hence we had a lot of opportunities to see each other and chat, and get to know each other better. When I was about to finish my studies in Economics and business, we met and a few weeks later he called me to offer me a job.

So you were new to the delis world...

Absolutely. As a matter of fact, when I first started working in the company in November 2003, I had to work my way up the ladder. I worked in the credit department, as an agents manager, in the sales department...

What kind of phase was the Salumificio going through?

It was going through a delicate moment, one that almost all companies are met with at a certain time: that is to try and make a qualitative leap from a small family-run company to a more structured firm. A transition that we have worked on since the year I arrived at the Salumificio in 2003 up until 2010-2011, when the path we had to take on became clearer.

That is?

As we all know, those were the years after the great crisis of 2008, followed by the crisis of the Italian sovereign debt crisis, with the measures of the government Monti, in 2011. Well, in that exact context, the company realized that export could and should be the cornerstone to face the future. So, one day, they called me in and said: "We absolutely have to strengthen our export, do you want to take care of it?". Even if I was not familiar at all with business negotiations and such dynamics, I couldn't decline.

This was the start of a 'second life' at the company.

Up until that very moment, I had only been on desk duty. It had been a formative period, actually, which has been extremely helpful. From that moment on I was busy with meetings around the world, international trade shows, and frequent trips overseas.

You have been working in Sorrentino since 2003: what does it mean to spend 20 years in a family-run SME?

It's a challenge and it's not for everyone. Personally, I have always found it more exciting to be part of a 'measurable' project, working hard every day.

Which are the strengths and weaknesses of such a business?

In family-run businesses the mood among employees affects the environment and daily work, for sure. As for the great strength, there's definitely a more rapid decision making

and the possibility to interact with the top management on a daily basis.

What can you tell us about the Sorrentino family, how has the relationship with them evolved through the years?

The Sorrentino family has always believed in me, maybe because I have always given my all. They are hard workers, nothing is done by chance. There has always been an ongoing dialogue, a direct relationship, characterized by easy and rapid questions and answers. They have granted me maximum freedom of expression, without limits.

The million-dollar question: what's the secret to selling abroad?

First of all, there is not only one right answer. Many are the aspects coming into play: the company's size, the sector where it operates, the products' range, the geographical location, and the management's mindset.

How much did the export of Sorrentino account for when you first started and how much is it worth now?

150,000 euro at the beginning, whereas now it amounts to approximately 9 million euro, accounting for 30% of the turnover.

Let's get back to 2011-2012 when your adventure as an export manager started.

Actually, my first major debut abroad happened in 2009, during Anuga in Cologne. The first trip in 2012 to Beirut, Lebanon. I told myself: "I've got to start somewhere!". I packed my bags and there I was in Fiumicino.

And how was it?

Once I got there I immediately understood that the path would have been long and winding. Yet at the end I came back home bearing a rich order of delis. And that's where the Americo export manager was born.

How would you sum up your vision that led to the results achieved in these years?

Having and maintaining an underlying authenticity, always contributing with far-sightedness and ideas, in order to keep everything in balance. Three adjectives for my vision: speed, simplicity, and clear operations. Definite and quick answers, easy and direct messages.

In a nutshell, could we say that the main challenge consisted in finding an identity abroad?

Right, an identity that belonged to Sorrentino and none else. To find it, we had to analyze the company and understand how we could stand out from the competitors that had been present on such markets for many years.

Travelling is at the heart of many of your stories, what does it mean to you?

I feel lucky I am able to travel, not so much for the trip itself, but rather for the exchange, the discovery of our limits that allows us to work on and develop our potential. Furthermore, since I have been travelling around the world, I fell in love with Italy all over again. I love my country and I feel grateful to be born in Italy: nothing can beat our imagination, the food, our smiles, and our zest for life. I have extensively reconsidered the Italian population, its commitment and its ability to give the best in hard times. It's what makes us unique. And we should be proud of it.



Roberto Maccio (left) with the Export team: Gregory D'Ulisse, Americo Liberato, Luca Olivieri and Donato Di Rado



The expansion of the production site of Mozzagrogna (CH)

Sorrentino export best seller:
Nduja, Spianata piccante, Salami Milano, Guanciale, coppa, Gran Sasso Ham





SCENARIO

Eat Lancet reconsiders the planetary diet

In 2019 the Commission defined a sustainable food system, with a reduction, among other things, of red meat and sugar. Yet now it contradicts itself with a new report: the intake of animal source foods should be increased.



The targeting of meat and intensive farms goes back a long way: Greta Thunberg's climate strike movement is involved; animal welfare groups promoting stolen and most of the time sensationalist videos; as well as the lack of transparent information which we are constantly confronted with. Not that before people believed that hamburgers and prosciutto grew on trees, of course. Yet seeing with our own eyes and knowing a series of gruesome details regarding intensive farms and slaughtering practices, can make the difference in the way such a 'hot' topic is perceived.

The 'planetary diet' launched in 2019

Among the players that significantly contributed to the global battle against meat, there's Eat Lancet, the Commission referring to Eat Foundation, a body in turn created by the Stordalen Foundation. Managed by the homonymous Norwegian millionaires and the charity Wellcome Trust. Eat Foundation, perhaps, doesn't recall of anything at first. But things become clearer while looking at its board of directors, the corporations behind it (among them Nestlé and Bam, Norwegian giant distributor of fruit and vegetables), the various papers on planetary diet. Hence, one can imagine the reasons behind the extraordinary media visibility obtained by the report on a global scale.

In 2019 a detailed scientific report regarding planetary diet appeared on The Lancet. A path perceived as

the only way to safeguard our planet and at the same time our health, fine-tuned by 37 nutrition and sustainability specialists from 16 countries. A food system that would have prevented 11.6 million adult deaths per year due to cardiovascular diseases due to poor diets. But what does it state? It includes a more than doubling in the consumption of fruits, vegetables, legumes and nuts, and a greater than 50% reduction in global consumption of added sugars and red meat. The paper aimed at providing scientific evidence for a diet to be adopted universally. According to the diet, the daily calorie intake should amount to 2,500, including whole grains (230 grams), fruits and vegetables (200-600 grams), milk and equivalents (200-500 grams) and legumes (75 grams), less sugar (31 grams), chicken meat (29 grams), fish (28 grams), red meat and eggs (14 grams).

Everything changes in 2023

But in 2023 Eat Lancet reconsiders it all. After having shouted from the rooftops that meat is dangerous

and that the planetary diet will be the panacea solving all the problems of the world, the Commission does a U-turn. Why? That's easy: the 'astounding' planetary diet bears a great deal of contradictions. A sharp reduction in the intake of animal source foods could lead to severe risks for the health and the immune system. All in all, the planetary diet, with its standardized consumptions may be sustainable and green, but it is surely not healthy. As it was revealed by the paper 'Estimated micronutrient shortfalls of the Eat Lancet planetary health diet' published on The Lancet Planetary Health. The research evidences the lack of four key macronutrients: B12, calcium, iron, and zinc. In order to consume them in adequate quantities, it is necessary to increase the intake of animal source foods, according to the authors of the paper.

"Given the potential micronutrient shortfalls of the Eat Lancet planetary health diet, important changes might be required to achieve dietary micronutrient adequacy for adults without relying on fortification and supplementation", the paper says. "Most

importantly, we found that to achieve a micronutrient adequate diet that is also more feasible at the population level would probably require increasing animal source foods from 14% of total kcal to 27% of total kcal."

"Compromises between human health and sustainability are unavoidable"

Dr. Ty Beal, research advisor at the Global Alliance for Improved Nutrition, as well as main author of the paper, comments: "The planetary health diet is likely to help protect against noncommunicable diseases, which are the leading causes of death and disease worldwide, and to do so sustainably. But these new findings on shortfalls in essential vitamins and minerals are concerning because deficiencies in these 'micronutrients' can lead to severe and lasting effects, all of which ultimately limit human potential. The shortfalls of the planetary health diet are due to the low amount of animal source foods, which make up just 14% of total calories. To make the planetary health diet adequate in micronutrients would require increasing nutrient-dense animal source foods." According to Dr. Jessica Fanzo, Bloomberg Distinguished Professor of Food Policy at Johns Hopkins University and co-author, adds: "The challenge in providing enough micronutrients is doing so sustainably. But there is a limit. And there will inevitably be trade-offs to grapple with, between human health and environmental sustainability."

Dieta universale: Eat Lancet ci ripensa

L'attacco alla carne e agli allevamenti viene da lontano. Tra chi ha contribuito con un carico da 90 a questa battaglia planetaria, troviamo la commissione di Eat Lancet. Che nel 2019 aveva lanciato un regime alimentare sostenibile, con una riduzione, tra l'altro, di carni rosse e zuccheri. Ma ora si smentisce con un'altra ricerca, che sottolinea la necessità di aumentare i prodotti di origine animale.



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PALTUFA, CREAMY PALZOLA WITH TRUFFLE

Waitrose: wellness at its heart

Waitrose stably holds 4.6% of the market share in the UK, far less than giants such as Tesco (27.1%) or Sainsbury's (14.8%). Data analysis company Kantar Group is the source that recently gathered these numbers and plied the gap between the two top players and the supermarket chain based in Bracknell (Berkshire), founded in 1904, controlled by the John Lewis Partnership Group, with a turnover of about 7 billion pounds (equal to over 8 billion euro).

Leaving aside its size, in a landscape complicated by inflation and a consumer crisis that is also affecting the United Kingdom, Waitrose's employee involvement in the company is a key value. In fact, it is controlled by John Lewis Partnership, which is an employee-owned company.

The Brits' opinion

Consumers go to Waitrose to do selected shopping, they do not go there for their weekly shopping: they basically buy the quality and organic products they usually do not find at Tesco or Sainsbury's.

Waitrose, aspiring to offer better assortments, has higher prices than its competitors and prefers to strengthen relationships with "affluent" customers: it is probably no coincidence that its supermarkets are often located in the wealthiest areas.

The brand likes to carve out some space for "niche products", such as typical Canadian organic honey or Spanish biscuits such as those of Inés Rosales.

Customer service is patient and helpful, both in the official reception areas and along the aisles; equally appreciated is the practical impact of "in store" digitalisation.

The 'Essential Waitrose' brand

The private label has eight cornerstone products: meat, chicken, fish, milk, eggs, fruit and vegetables, tea and coffee. What they all have in common is clear provenance and healthy processing methods.

Beef and lamb are strictly British and sourced from farmers who share a clear commitment to welfare, and the same goes for chicken (either fresh, frozen or prepared),



which comes from animals that are reared to carefully prepared and controlled standards; pork (including sausages, bacon and ham) originates from British farms, where pigs are born in the open air and have plenty of room to roam.

Fish (fresh, tinned, frozen or in sticks) comes from responsible sources, while fresh fruit and vegetables are sustainably grown.

Tea and coffee are "Fairtrade", i.e., coming from certified sources on the basis of fair payment to farmers and workers; milk is sourced from cows that have spent more than half of the year in free-range pastures. Eggs are laid by hens that have had

plenty of space to peck, roost and move around.

Waitrose in the world

The first shop outside the UK was opened in Dubai in 2008: there are now 14 licensed shops in Dubai and Abu Dhabi; in 2020, a home delivery service was even launched in the United Arab Emirates via the website waitrose.ae.

The partnership with Hampshire-based Foods of Europe aims to export Waitrose products to Asian countries (Thailand, Malaysia, Singapore, Hong Kong and the Philippines being the most prominent).

Thanks to the relationship with

Caribbean Trading, Waitrose groceries are supplied by Masy supermarkets in many far-flung islands, including Barbados and Trinidad.

The relationship – since 1998 – with ParknShop, in Hong Kong and southern China, makes typical products such as muesli, candies and canned tomatoes available.

The partnership with Shell, on the other hand, highlights its environmental commitment and aspires to install 800 charging points for electric vehicles close to some of its major supermarkets by 2025.

Animal welfare app

Corporate marketing has built its

identity on the prominence of the concept of "welfare", which should be continually refined: now, they even invented a pioneering app to measure how farm animals feel.

The welfare assessors, who visit the approximately 1,800 Waitrose farms, use the app – which is the first of its kind and was even featured in BBC Countryfile – to record how animals express their emotions through behaviours such as being relaxed, tense, playful or anxious.

"This is a huge development for the industry as it is the first time a

retailer has explored welfare measures based on the concept of an animal's freedom to express positive emotions," says James Bailey, executive director at Waitrose.

The app, which was launched in February 2021, has already been honoured at the BBC 'Food & Farming Awards' in 2021, as the winner of the 'Farming for the Future' category.

Waitrose is also the holder of the European 'Best Retailer' award for 'Compassion in World Farming', a title it has won three times in a row.



Waitrose: il benessere al centro

L'insegna britannica si è conquistata una reputazione globale di fascia alta, con prodotti di qualità superiore a prezzi accessibili: il suo modello spicca per coerenza e attenzione nella gestione della private label. Oltre alle dimensioni, di Waitrose spicca il coinvolgimento in azienda dei collaboratori.



lsmgroup.it





THE COMPANY

www.montanari-gruzza.it

Montanari & Gruzza, an unbreakable bond with the territory

Tradition, passion, innovation: a story that stretches back in time and constantly evolves. The company based in Reggio Emilia strives for excellence through quality and sustainability. Among the flagships of the brand, Burro Nobile stands out.

For over 70 years Montanari & Gruzza, headquartered in Reggio Emilia, has been producing with passion, according to ancient traditions combined with innovation, local dairy products: high-quality butter and different Parmigiano Reggiano specialties. The bond with the land, the biodiversity protection, the constant quest for new ways to improve and make the supply chain more sustainable are goals that the company has been pursuing for many years.

The story

The story of the company stretches back over a century ago, in 1910, when Leonida I Montanari was already specialized in the production and trade of rennet and equipment for dairy factories. The growth then continues in the '50s with his son Arturo, who together with Arnaldo Gruzza founds the first M&G, by combining the business of hard cheese, called 'grana' at the time, together with the production of butter, and it was handed down in the vision of Leonida II, who signs and strengthens fruitful partnerships with the breeders and producers of Parmigiano Reggiano of the area for the supply of the precious Emilian raw material: rising cream, the higher-fat layer skimmed from the top of the milk. Since then the company has grown, becoming a benchmark in the production of high-quality products for its customers and a reliable partner for the suppliers, with cutting-edge machinery, high production capacity, a vast and varied range of established brand, distributed in Italy and overseas, apart from private label goods manufactured for Italian and international retailers.

The supply chain

The daily collection of rising cream in local dairies and the production of Italian butter are undoubtedly the most significant activities for the company. The product deriving from



Margherita Montanari with the supervisor of the cheese ageing



Moreno Cani, the cheese-maker

Montanari & Gruzza, un legame indissolubile con il territorio

Da oltre 70 anni l'azienda Montanari & Gruzza di Reggio Emilia produce con passione, secondo le antiche tradizioni coniugate all'innovazione, prodotti della filiera lattiero-casearia del territorio: burro di alta qualità e specialità di Parmigiano Reggiano. Il legame con la terra, il rispetto della biodiversità, la costante ricerca di nuove vie per rendere più sostenibile la filiera sono obiettivi quotidiani a cui l'azienda guarda con impegno da molti anni.

this selection represents an excellence from an organoleptic and sensorial point of view, also due to the use of live cultures 'Sacco System' – as highlighted on the packaging of the most renowned companies –, which is a well-known Italian supplier of cultures complying with the highest standard of quality, with whom Montanari & Gruzza has been collaborating for more than 30 years. Through the complete control over the production chain, and all the stages of milk processing, the company has recently carried out and completed, in partnership with the Research center on animal production (CRPA), the project 'Ethical Cheese', sponsored by the Region Emilia-Romagna within the framework Psr 2014-2020, with the objective of improving the standards of animal welfare and the carbon emissions inside the farms.

The butter

The oldest and most renowned butter brand of the company is Antica Cremeria, a premium and aromatic

product which is currently distributed in the main Italian grocers. Thanks to the Research & Development division of the company, the range of products has expanded over time with the introduction of organic, 'free from' products with particular characteristics. Among the flagships of the brand there is without a doubt Burro Nobile, produced in collaboration with LattEmilia. It is the result of a virtuous research project that aims at improving the quality of the food ration cows with fresh fodder, hay, and flaxseeds, starting from 'Prato Stabile', characterized by spontaneity and high biodiversity of fodder.

The territory

In the last 20 years Montanari &

Gruzza has focused on its range of butter and Parmigiano Reggiano, investing in the selection of premium and native breeds of cattle for the production of milk of the finest quality, to the acquisition of an alpine dairy factory and a barn, both located in the Parma area. It is indeed by virtue of such a choice that the company today offers a complete organic range and Parmigiano Reggiano deriving from typical dairy bovine breeds like the Red Reggiana Cow, the Brown Alpine Cow, the White Modenese Breed, Mountain Parmigiano Reggiano, and cheese aged 40 and 60 months. The unbreakable bond with the Emilian territory still shapes and guides the company's mission which, through the relationship with all the dairy supply chain players of the area and the drive for innovation, pursues the objectives of preservation of the natural resources in the long-run and of prosperity of the local community living in the unique territory where it operates.



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THE INTERVIEW

www.virgiliofnb.com

“Our expertise? Overcoming barriers”

Three Italian managers based in Asia created a unique export office concept that provides f&b companies with a direct line of contact with the Asia-Pacific region. We have interviewed Gabriele Falcone, one of the co-founders of Virgilio Creating Value.

Virgilio Creating Value is the brainchild of Gabriele Falcone, Filippo Cassabgi and Pierluigi Pollio, three Italians living in Hong Kong, Bangkok and Shanghai, respectively. Their professional background includes a decade of experience in multinational food & beverage companies and leading import companies. Founded in 2021, Virgilio operates as a highly specialised export office throughout the Asia-Pacific region. And just two years after its foundation, it already boasts clients such as Galbusera, Latteria Sorensina, Costa d'Oro, Gruppo Santa Margherita, Vantguard Group, Rustichella d'Abruzzo, Ranise and 50 Top Pizze. Gabriele Falcone tells us about the project.

How did the idea of Virgilio Creating Value come to mind?

The idea came from an observation: until 2021, my two partners and I worked in the Asian divisions of multinational food & beverage companies. We were therefore witnessing a huge difference among the businesses operating in the region: on the one hand, there are multinational companies, with offices based in the main cities of the continent, plenty of resources and such a critical mass that even individual brands can count on a full regional team. On the other hand, we see many high-value companies that do not have a constant presence there and whose market activity is mainly carried out remotely, with some travel and a few trade fairs during the year, but without continuity.

Did you develop the “one-stop solution” concept for these companies?

Exactly. At Virgilio we inte-



From left: Filippo Cassabgi, Gabriele Falcone and Pierluigi Pollio

grate all necessary functions for the brand to grow – business development, strategic consulting, communication and marketing – thanks to the work of a team of professionals who know their target markets inside out. A team that encompasses very different, and therefore complementary, skills and competencies. In a nutshell: we provide the set-up and market approach of a multinational business, but applied to all companies in the food sector. Or almost all of them.

Which companies are not suited to this approach?

To answer this question, we must make a premise. Asian markets are very, very culturally distant from Italy. This means that if a brand or product is famous in Italy and perhaps in Europe as well, it is easy for

it to break into the US market, which is culturally very close to us, but this is not necessarily the case for Asian markets. In Asia-Pacific, most of the time you have to start from scratch. So, to answer the question, I would identify two types of companies that are suitable for entering these markets: large industrial companies – which may already have a business started in Asia but want to expand it – and then what we call the “evolved artisans”.

What does that mean?

They are companies with an existing export office and a product range designed to get into international markets, but which could benefit from a special focus on Asia and the Pacific.

What are the main problems of Italian exporting companies?

One problem is certainly taking product information for granted. For example, in Italy, a rich creamy wafer equals high quality, while in Taiwan, they usually prefer it dry and crispy. To successfully market the product, it is therefore necessary to have brand launch strategies (both digital and non-digital) that support its development. Positioning a product in the right sales channel from the start requires a deep understanding of the local markets and culture, which is precisely one of our strengths.

By Asia-Pacific we actually mean very different realities. In which markets exactly do you operate?

From Southeast Asia to Australia, including that vast area that comprises Greater China and Japan. We are

physically based in Shanghai, Hong Kong, Bangkok, Taipei and Singapore. And, in the future, we are obviously considering opening more offices in the countries where we operate. To date, we regularly travel where we are not physically present.

How do you manage to work as a team?

When the company was founded in 2021, which was in the midst of the pandemic, we certainly succeeded because all of us in the team already had a long-standing professional and personal relationship. The health emergency lasted a long time here: for three years we could not sit down at a table and talk. Our deep understanding of each other overcame any communication difficulties caused by distance and time zones, and

we built a team that integrates different visions and skills. We act in every respect as a regional office, and our professional background in multinational companies has also helped us a lot.

How?

When we start a cooperation, it is as if we become an integral part of the company. The best way to get the most out of us is to see us as part of your team.

Do you also help companies solve problems that may arise in normal export activities?

Of course, we help to handle problems of all kinds together with the company. Local importers see us as a reliable interlocutor, able to explain the difficulties that may arise in the various stages of brand and product development and how to deal with them in the quickest and most effective way. So we facilitate communication, reassure importers, and help companies understand what to do. Knowing how to deal with critical issues is essential, because when the importer or distributor loses trust, even if the product has great development potential in the market, there is a risk of irreversibly jeopardising everything. And this is especially true for brands that are just starting to make themselves known. It is certainly a demanding job, but one that gives us a lot of satisfaction when we see companies placing flags in strategic markets.

These services will come at a high price...

Of course, but it is certainly not as expensive as maintaining a dedicated person or team based in Asia. The cost of salaries, visas, accommodation, travel and so on can have an unsustainable impact on companies that are still developing. In Asia, investing for the long term is the only way to get results. During the first year, we organise the work: we get to know the product, the company, and we study its potential in the markets. The whole team becomes familiar with the brand and understands how to manage it in the different markets. One-off orders are not our goal. We look for the right partners with whom we can do long-term planning. And we are very proud to see that those who started working with us

have not decreased but rather extended the service. It is a sign that the system works. And it is no coincidence that, to date, we get most of our clients by word of mouth.

Which Asian markets are the most dynamic in terms of consumption?

Due to the current economic downturn in China, both mainland and in the special region of Hong Kong, there is certainly less ‘appetite’ for risk now and it is therefore more complicated to launch new products or start new projects. But it is still a key area in the whole region because of its potential and the increasing sophistication of consumption – with well-planned work, it is possible to achieve results in both the medium and long term. Southeast Asia is also a very dynamic area. I am thinking of Thailand, Indonesia, Malaysia, the Philippines. However, it is important to always take into account the peculiarities of the individual countries, which all have in common the trend of growth of the middle class and consequently a greater interest in higher quality products of European origin. Australia, for its part, is a completely different market. The advantage here is cultural proximity, but this also means that there are very strong local competitors for many product categories, such as dairy or bakery. Introducing the product into the market is therefore less complicated, but placing the product well in the distribution landscape is essential. In short, each market is a different world.

And this also applies to the activities that we carry out together with companies.

Can you give us some examples?

With Rustichella d'Abruzzo, which provides high-end products in the hospitality sector, we recently threw a gourmet dinner at a Michelin-starred restaurant. On the occasion of International Pasta Day, we are also planning educational activities at the ALMA International Cooking School in Bangkok. Just yesterday, in Shanghai, we held a presentation event together with the new importer in the presence of the main media and food service operators. On the other hand, for brands targeting large-scale consumption, we do a completely different kind of activation, involving

retailers and consumers. Each product has its own audience and therefore its own target activities.

Many companies are discouraged from entering Asian markets because of the barriers, especially bureaucracy, that they have to face. What is your advice?

It is absolutely true. Between product registration, certificate translation, laboratory analyses and so on, there is a lot of work to be done just to overcome the barriers to entry. But high barriers also mean there is much room for growth. We can offer important results over time to all companies that want to overcome these barriers together with us. This is our mission. And our bet.



VIRGILIO
CREATING VALUE

“La nostra specialità? Superare le barriere”

Tre manager italiani residenti in Asia danno vita a un concetto di export office unico nel suo genere. Che fornisce alle aziende del f&b un filo diretto con i mercati dell'area Asia-Pacifico. Intervista a uno dei soci fondatori di Virgilio Creating Value, Gabriele Falcone.

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THE COMPANY

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www.gallinamariospa.com
www.foodmaniasrl.it

Gallina Mario: Prosciutto according to tradition since 1958

Artisanal quality with a touch of innovation. Together with a daily commitment towards the people and the territory. All this results in Gallina Mario and Food Mania's high-range products, including Parma Ham, also pre-sliced.

Dedication, the right balance between tradition and innovation, together with a strong family spirit. Gallina Mario's prosciutto has been made in the plant of Lagrimone, located 720 meters above sea level, about 40 km from Parma (Emilia-Romagna - Italy), since 1958. Alongside his wife Maria, Mario Gallina ventured into the production and commercialization of Italian ham up until 1968, when the company became an associate of the Parma Ham Consortium, and it started producing the delicacy known all over the world. Still to this day, the production of the PDO accounts for approximately 99% of the total turnover. Today, the process still takes place in the original cellars and maturing rooms, in an exciting and refined atmosphere where hams are hung on the traditional wooden shelving, the so called 'scalera'.

Alcide Gallina, who has defined the path and new horizons for the family-run business, thanks to the sales network in a variety of channels, both in Italy and in Europe (e.g. France, Switzerland, Germany, Belgium and UK). Innovation is mainly led forward by the third generation of the family, Laura and Andrea Gallina. They have promoted the digitization of the KPI monitoring processes, investments in cutting-edge machinery, and software.

Reliability, integrity, passion and an increasing focus on sustainability

As the world outside changes, integrity, passion and care (for people, territory, and all-around sustainability) remain the core values for Gallina Mario. "We try to convey these cornerstones with commitment every day. These are the key features that our collaborators, customers/suppliers, and stakeholders on the territory already acknowledge us", explains Laura Gallina. "We always strive to do better, with the main objective of guaran-

teeing stability to the organization to overcome the day-to-day challenges, ultimately still conveying our identity." An identity that Gallina Mario has forged over time, proportionally to its dimension and resources, boosting well-renowned and appreciated brands and products in Italy and abroad. Among them: Prosciutto di Parma (PDO) Gallina Mario aged 18, 24, and 30 months, Prosciutto di Parma (PDO) Il Pregiato, Il Capobranco, and Il Montanaro.

About the key values quoted above, "the first and the second one do not require much explanation. Passion is what allows us to think straight even when the path becomes treacherous. Our satisfaction is knowing that our products allow people to take a journey through taste, being a synonym for good and healthy food". As far as the environment is concerned, innovations are led by the possibility to optimize spaces and performances, to limit consumption and waste of resources. The company has installed in one of the buildings a photovoltaic system, it has achieved new machineries

to increase the efficiency in production and it has studied eco-friendlier packaging that can be disposed in paper. Research and Development are also in cooperation with the main packaging suppliers. "All these actions were undertaken in order to stay competitive on the market and increase the attractiveness towards clients and customers," underlines Andrea Gallina.

Gallina Mario pre-sliced cold-cuts: the news and top range products

In 2013 the Parma ham producers Gallina Mario and Prosciuttificio San Domenico founded Food Mania, investing in an innovative and technologically-advanced sector: high-quality cold-cuts offered pre-sliced and ready to enjoy in ATM trays. Headquartered in Langhirano (Parma), "Food Mania is young, yet it bears all the experience and values of the founding partners," say Laura and Andrea Gallina. "Here too, people come first, by making all the difference in guaranteeing an artisanal production. The semifinished products are sliced at a low but positive temperature. The slices look like they were cut by a butcher since a lot of attention is paid to the arrangement, so to offer a product that is attractive to the sight with well separated slices". Moreover, some technical improvements have been implemented to increase the efficiency in the production processes. "Altogether, the efforts pay off, workers and clients". From an environmental point of view, one focus is to research and invest in sustainable packaging options. One case of success is a preformed tray that can be disposed in paper with a personalized graphic. It is a solution that goes hand in hand with our antibiotic-free from birth Parma ham, as well as the Animal Welfare range. We have been betting on these products for a few years now and they are getting all the recognition from our customers."



Reliability, passion and an increasing focus on sustainability to save the artisanal quality standard of production"



People come first: they make all the difference in guaranteeing a traditional production process"

Gallina Mario: un prosciutto che sa di tradizione

Artigianalità e tradizione, con un tocco d'innovazione. Una forte attenzione alle persone e al territorio. Questi i valori che guidano il lavoro quotidiano di Gallina Mario e Food Mania. E di cui si ha un 'assaggio' nel vasto assortimento di referenze proposte - anche in vaschetta -, tra cui spicca il Prosciutto di Parma, core business aziendale, lavorato il più possibile al naturale. Ultima novità di prodotto: Prosciutto di Parma senza antibiotici dalla nascita e/o da filiera benessere animale.



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Once upon a time, there was a cork

We went on a trip to Portugal with Amorim Cork, the largest global producer and supplier of traditional wine closures. Exploring how they are made, as well as the tricks to avoid trichloroanisole.



photo credit: Renato Vettorato 2023

the world cork market and 28% of the global wine stopper market. All 56 branches of the company, which are located in 28 different countries, closed the financial year 2022 with a turnover of almost one billion euros. Amorim is therefore the leading cork group in today's market.

To better understand the genesis of a cork, the best thing to do is to set off for southern Portugal. From Lisbon airport, we head east: here we are in the Alentejo area, a land that is very hot in summer, when the dominant colours are the tawny of the fields and the dark green of the cork-oaks. In Alentejo, more precisely in the village of Águas de Moura, near Setúbal, you can find the so-called Sobreiro Monumental: the largest cork-oak in the world, a 236-year-old tree with a trunk circumference of 4.15 metres, named European Tree of the Year in 2018. Over 20 years ago, this oak was almost felled, when 411 other trees of the same species were cut down, against the binding advice of the Directorate-General for Forestry and Agriculture. This caused such a stir that in 2001, in the final phase of the second term of António Guterres' government, the Portuguese Council of Ministers approved a new law for the protection of cork-oaks and holm-oaks, which is still in force today: if these two species are illegally felled, not even a hut can be built on that land for 25 years. Thus Portugal recognises the importance of the *Quercus suber* – not only economically but also ecologically and culturally –, rightly considered one of the country's symbols, along with Port wine and cod cooked in 365 different ways.

The cork-oak forest of Amorim

In Alentejo, it is very instructive to visit, in the right months, the cork-oak forest of Rio Frio, near Pinhal Novo. Do not expect a dense forest of trees: it is 3300 hectares of scrubland with many, many scattered cork-oaks, which years ago almost became Lisbon's new airport, a project that was later abandoned. Last year, Amorim, which already owned half of it, took it over in its entirety: this forest allows the company complete control of the supply chain, from the tree to the market. When the time is right, the forest of Rio Frio is the ideal place to observe the work of the corticeiros – the men responsible for decorticating the trees, for cutting the bark that makes up raw cork. If you go to the forest, you will see plants whose bark has already been removed, and whose trunks are painted with white numbers from 0 to 9, different for each plant. "It corresponds to the year of their last bark removal. For example, a plant with a '2' was decorticated in the year 2022," explains Carlos Veloso dos Santos, CEO of the com-

pany's Italian branch. After the bark has been removed, it needs time to grow again, and it takes at least nine years. A cork-oak is decorticated for the first time when it is 25-30 years old, but the quality of the cork from this first decortication, as well as that of the second one, is unsuitable for cork stoppers, and can at best be used for granulates or insulation. Thus, the first real useful decortication will take place when the plant is about 43-45 years old. "Given how long a cork-oak can live, a tree will be decorticated about 15 to 18 times in its life," Veloso dos Santos concludes. The decortication can be done using two systems. The machine system, which involves the use of motorised saws, is the fastest. In the manual system, which is the most fascinating, it is amazing to see the skill with which the workers, in the sweltering Alentejo heat, manoeuvre calibrated blows with razor-sharp hatchets: as Veloso dos Santos says, "The corticeiro is the highest paid agricultural job: whoever does it learns from an early age to recognise

the thickness of the bark, because it has to be cut without damaging the underlying wood".

The importance of research

From the forest, the cork is transported to Coruche, to the Amorim Forestal storage and primary processing centre. There, the cork is stored, boiled, and sorted. Storage is also pivotal: it is often because of storage errors that trichloroanisole (TCA) – the molecule responsible for the deadly sin of this type of stopper, the infamous "corky smell" – develops. Veloso dos Santos explains how they tried to tackle this problem: "Paradoxically, it was the initial spread of plastic stoppers, which do not have TCA problems, that made us embark on a rigorous course of research and development: in the past, bottles were only closed with cork, and, since we had no competition, we were guiltily not interested in better understanding this defect. Then, after the arrival of these other stoppers, we ran for cover, investigated and discovered many things. For example, we discovered that TCA can develop not only

in nature but also in the factory. So, we started storing cork on concrete floors, covering it with tarpaulins".

Most of the research and production take place further north, in the Santa Maria de Lamas plant. There, in a factory equipped with highly intelligent robots and skilled staff, stoppers of all prices and for all tastes, agglomerated or monoblocs, are produced. There is also the research and analysis laboratory, which has developed a proprietary (i.e. self-developed and patented) technology that provides for the analysis and validation in gas chromatography of every monobloc and champagne cork in a matter of seconds. The analysis allows cork stoppers called NdTech to have a maximum TCA level of 0.5 nanograms per litre or less. For comparison: it equals one drop of water in 800 Olympic-size swimming pools. We dare you to find it.

To top it off, cork is sustainable: a cork stopper does not harm the environment, and it is recyclable in many ways, for example as an insulation material.

Tommaso Farina

C'era una volta un tappo

Abbiamo fatto un viaggio per scoprire con Amorim Cork, massima azienda mondiale dedicata alla lavorazione del sughero, come nascono le tradizionali chiusure da vino. Eccoci in Portogallo, alla scoperta delle querce e delle astuzie per evitare il trichloroanisolo.



Our De 'BAITA' is not just a bresaola.



In the heart of the Rhaetian Alps, in Northern Italy, Valtellina Valley is the place Bresaola has its origins. For our customers we want and seek the best meats and use secret traditional recipes. Our care accompanies the entire drying and curing process and we personally check every phase that leads to the birth of our special bresaola. Its unmistakable taste is the result of all the passion that only the artisans who, like us, have been cultivating a love for tradition for generations know how to put into their creations.

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Quality is the key



THE COMPANY

www.valledorospa.it

“We produce for our customers as for our children”

Since 1954, quality and safety lie at the basis of Valledoro's business philosophy. The company is one of the leading Italian manufacturers of breadsticks and bakery delicacies, thanks to a wide product range made to satisfy all wants and needs, from breakfast to dinner.

Valledoro was born and raised under the sign of an exciting family story. A story that begins in Brescia, in 1954, with Rina Consoli, Ferruccio Zubani and... the Bibi Bibò: crunchy bites with a sweet taste created to feed children in a healthy and natural way. A specialty that the company still produces with great pride today, and that represents a strong connection to the territory. That greedy and original product marked the first step of Ferruccio and Rina's successful business venture, and within a few years the family bakery was transformed into an artisan workshop.

“Since then, our company has taken on board two more Zubani generations, leading to an important evolution in terms of volumes and production diversification”, the company explains. “Today, with seven production lines, we are among the leading companies in the bakery industry in Italy.” Valledoro soon specialized in the production of breadsticks, and in recent years the assortment has been enriched with plenty of original products: savory snacks, crunchy bites and gluten-free goods, to respect special nutritional requirements. Innovative products designed to satisfy the needs of even the most sophisticated gourmets, and more will be presented to market operators soon.

In order to meet its customers and the potential ones, and to present them the latest product launches, every year the company takes part in some of the most important food trade shows globally. This is the case for Anuga (7-11, October 2023) and ISM (28-31 January, 2024) in Cologne, Germany, and Sial in France (19-23 October, 2024). Today, exports account for about 40% of the company's turnover and are directed all over the world.

The artisanal method: a strong point

For almost 70 years, there is one founding value that has always guided Valledoro's growth path: “Producing for our customers as for our children”. “For this reason - the company highlights - we pay utmost attention to the quality of our products and we monitor the impact that our company has both on people and on the environment on a daily basis.” This attitude translates in the great attention paid to strategic elements: from packaging to energy supply choices and manufacturing techniques. “Our production method has constantly improved over the years and has drawn from new technologies in the food sector, while respecting the artisanal processing method. It is based on a careful selection of grains, in order to obtain quality flours, and on an accurate formulation of the doughs which are essential for obtaining balanced and healthy products. Each ingredient used for Valledoro productions is always selected from the best suppliers and guaranteed by a rigorous traceability system.” Valledoro's product range is indeed free from chemical additives or preservatives, “because we strongly believe that a good product must also be as healthy and as natural as possible. This is the reason why Valledoro's product respects specific qualitative criteria: the texture, the shape, the taste balance, the crunchiness so as to make it the ideal snack during the day, from breakfast to evening meal.”

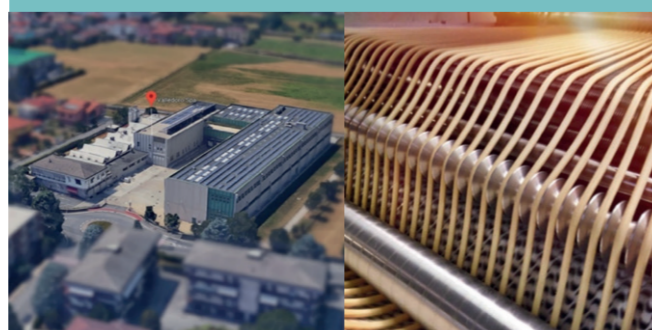
Products' quality and safety is guaranteed by the two highest global standards: BRC (British Retail Consortium – Global Standard for Food Safety) and IFS (International Food Standard).



THE STRIVE FOR SUSTAINABILITY

For Valledoro, sustainability is a serious matter. For this very reason it transformed its ambitious goals into concrete and consistent actions:

- It invested in a large number of photovoltaic panels (666, for an area of 1100 m2) and in solar and geothermal systems that allow heating and cooling in the office area. The reduction of CO2 emissions is Valledoro's main environmental goal.
- It minimized water and packaging waste, reducing it by 30% in a few years
- It became active partners of Treedom, for tree planting around the world. From this collaboration the ‘Valledoro forest’ was born, made to date of 2,000 trees worldwide.
- Sustainability is not just an environmental issue, but also a social one. To this purpose, Valledoro has invested time and energy in training the future generations: every year it welcomes around 3,000 students for educational projects.



“Produciamo per i nostri clienti come per i nostri figli”

Dal 1954 qualità e sicurezza sono alla base della filosofia aziendale di Valledoro, tra i maggiori produttori italiani di prodotti da forno, dolci e salati, grazie a un'ampia gamma di referenze pensate per soddisfare tutti i gusti e le esigenze, dalla colazione alla cena.



Innovating Through Tradition Since 1959

Founded by Mr. Ermes in 1959, the company has always been run with dedication and passion by the Fontana family. Today, Mr. Ermes children run the business, while the third generation works in the company to learn the secrets, the trade and the love for the product that are passed down from parent to child ensuring continuity. Mr. Ermes started his business salting and curing only 17 hams; today there are more than 500.000.



Fontana Ermes S.p.A.

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INSIGHT



In the US the business has taken off already. It's the 'fourth meal' of the day, and we're not talking about the noon snack, but of the midnight snack instead. Ice cream, cookies, cereals, chips and a wide variety of sweets top the consumer preferences, and for scientifically proven reasons. There is also another important thing to consider: the global market for sleep aids - that is to say the products that help you sleep better (mainly pills and supplements) - was valued, in 2022, nearly 70 billion dollars, and according to forecasts this figure could even double by 2030.

In America, where 80% of the population habitually consumes evening snacks (for an estimated cost of around 50 billion euros a year, nationwide), about half of the population also suffers from sleep disorders. The result: consumer brands quickly put two and two together and are gradually replacing pills and herbal teas with chips and sweets that, in addition

to satisfying the midnight hunger, help you sleep peacefully too. The topic is definitely interesting for the whole food industry, before this high-potential market becomes the sole prerogative of big corporations.

Are nutrition and sleep disorders connected?

The sleep-food association, as we said, is not entirely unsubstantiated. The American Sleep Foundation explains why: "Research studies have found that insufficient sleep increases overeating and unhealthy food choices. Not surprisingly, studies have also linked insufficient sleep to weight gain and a higher risk of obesity", reads the website. "Disruptions to normal hormone production are a driving factor behind sleep deprivation leading to overeating. Sleep plays a vital role in regulating hormone levels, including the hormones leptin and ghrelin, which are integral to hunger and appetite." Insufficient sleep also

affects parts of the brain that determine how we think about food: "In studies of people with limited sleep, brain activity is enhanced in areas that are involved in viewing food as a positive reward, making us more vulnerable to eating too much". And continues: "One study found increased appetite for high-calorie foods in people who didn't get enough sleep. Similar results have been found in young children and adolescents, indicating that poor sleep may be a factor contributing to rising rates of childhood obesity."

A matter of ingredients

Nightfood, Goodnight, Good Source Foods and The Functional Chocolate Company are some of the brands that chose to enter the late night snacking market, defined by Mintel as "one of the most interesting and revolutionary" in its annual Food and Drink Trends report. Behind such products there is, of course, also a great deal of

study, research and formulation. As confirmed by Chris Peruzzi, founder of The Functional Chocolate Company. Its best-selling product is Sleepy Chocolate, made with ingredients such as Phargaba (a dietary supplement that promotes relaxation), chamomile and passion flower.

"Customers regularly tell us that it has replaced their isolated melatonin supplement or pharmaceutical sleep aides," Peruzzi said in a recent interview. The biggest challenge, he explains, was creating the perfect recipe. "Some of the ingredients we work with, like valerian root, are simply unpalatable," he said. "It took some creative food science to work with herbal ingredients like this and get the taste profile just right."

The Nightfood example

The importance of offering a tasty and at the same time light and sleep-supporting snack is also highlighted by the CEO of Nightfood, Sean Folkson. Nightfood is among the most innovative brands in the field of late night snacking, thanks to a varied range that includes ice creams and cookies. Back in 2015, when the company started its business, it debuted with a sleep-promoting nutrition bar, which nevertheless wasn't much appealing to consumers. "I now understand that providing night snackers with nighttime nutrition bars is like giving an 8-year-old a pet rock," Folkson explains. "Interesting, but not exciting or life-changing. On the other hand, providing night snackers with nighttime ice cream is like giving that 8-year-old a puppy."

From this idea the Nightfood's ice creams line was born, which includes a variety of flavours, from Midnight Chocolate to Full Moon Vanilla. Unlike traditional ice creams, it boasts a definitely lighter nutritional profile: on average 70% less sugar and the same goes for the calorie content, while fat stand at 10%. It also contains in-

gredients which, according to the company's sleep experts, help promote rest, such as calcium, magnesium, zinc, inositol and vitamin B.

Just a few months ago, Nightfood announced that its biscuits have been chosen by the Portuguese TAP airline for the Miami-Lisbon flights. A month earlier, the Sonesta International Hotels Corporation - the eighth largest hotel chain in the US - placed Nightfood ice creams in the rooms of its hotels. Which are available already also at Courtyard by Marriott, Holiday Inn Express, Springhill Suites, Hyatt Place, Fairfield Inn & Suites, among others.

The future of the category

Among the most innovative brands in the sector there are also Good Source Foods and Goodnight. The latter, which belongs to the Nestlé Group, has launched the Goodnight Dark Chocolate

Tart Cherry. These are sweets sold in packs of three individual bites, featuring a sweet-tart filling that's enveloped in chocolate. Among the ingredients: magnesium, L-Theanine and casein, which promote the body's natural relaxation. For Doug Munk, director of new business ventures for Nestlé USA, the Goodnight brand "is confirming our beliefs that people are looking for a natural remedy for something they normally take in supplement form such as melatonin. We are also finding people are looking to replace some of their junk foods before they go to sleep with something that is a little better."

After the success of the tests conducted last year, Nestlé is preparing to launch the new 'Goodnight 2.0' range. Good Source Foods, for its part, for its line of Evening Calm chocolates has chosen to focus on a special ingredient: dried cherries, known for being a natural source of melatonin.



Spuntino di Mezzanotte: un business in rampa di lancio

Negli Stati Uniti il mercato degli snack serali vale circa 50 miliardi di dollari l'anno. E diverse aziende del settore alimentare (inclusa Nestlé) hanno già scommesso su quello che è stato ribattezzato 'il quarto pasto della giornata'.



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The Bacchini Family

Surgital: Made of Italy ambassadors

Preserving traditional recipes, yet experimenting with new culinary trends. With the ultimate goal of spreading the culture of fresh pasta around the world. A glimpse into the newest additions to the 'Divine Creazioni' brand premiering at Anuga 2023 (Cologne, 7-11 October).

Bringing the culture of fresh pasta in all its forms around the world is Surgital's mission. Founded in 1980 in Lavezzola (Emilia-Romagna), what was initially a small artisan workshop, through the years, turned into an international company, producing on a daily basis up to 175 tons of fresh pasta, 90,000 ready meals and 30 tons of ready-made sauces for the retail and Horeca sector.

Despite having grown, the Group (which today comprises Surgital SpA, the parent company; Surgital France sarl; Surgital America Inc.; and Ca' Pelletti Retail srl) has remained faithful to its roots, well-planted into the promotion of the tradition of Italian gastronomic culture, yet with an ongoing strive to innovate according to new trends and to improve production performances, without sacrificing artisanal quality. What has remained unchanged is also the deep family spirit: Surgital, as a matter of fact, is 100% owned by the Bacchini family. A glimpse into the company's performances, future product launches, and the success of the fine dining brand 'Divine Creazioni'.

A boundless success

Despite the difficulties caused by the Covid-19 pandemic first and then by the current geopolitical scenario – marked by rising costs in energy and raw materials –, in the first six months of 2023 Surgital has performed positively, further accelerating the growth achieved in 2022 with revenues at 109.5 million euro (+39%). A positive outcome which is the result of a solid market presence, both in Italy and overseas, backed up by an ever richer product range, which is aimed at satisfying all the needs of market players and consumers.

As of today, Surgital exports its deep-frozen fresh pasta to 60 countries, with an export share of over 40% of total revenue. "Our international presence is guaranteed by a well-structured network of export managers and direct employees, in particular in the UK and Germany, and company-owned commercial facilities in France and the USA," explains Alberto Bondanelli, export director.



Bauletti with Barolo DOCG slow braised beef



Bauletti with porcini mushrooms and Taleggio PDO cheese

Two new entries for 'Divine Creazioni'

Aiming at reaffirming its position on the European market, and in general in the rest of the world, Surgital will take place in the upcoming edition of Anuga (Cologne, 7-11 October). On the occasion, "we will have a large central kitchen in our booth, with a spotlight on our premium line 'Divine Creazioni', from which two autumn new entries will be given a preview presentation to the international market," Valentina Beltrandi, event specialist, comments. "These new recipes, as always, combine tradition and innovation with sophisticated pairings and flavors", Carlo Tampieri, brand manager, explains. The first new entry, Bauletti with porcini mushrooms and Taleggio PDO cheese, is an upgrade to the previous Scrigni with porcini mushrooms. "A filling full of the aromas of the undergrowth, with the typical fragrances of the ingredients melding together in a combination that evokes an autumnal atmosphere, an ideal option for restaurateurs changing the menu for the new season", the brand manager adds.

The second new entry, moreover, Bauletti with Barolo DOCG slow braised beef, is the fruit of constant research and development, with the aim of meeting the catering world's need for a filled pasta with a filling based exclusively on meat. The choice fell on 'stracotto', a traditional Piedmontese dish that is now well-known and appreciated from Northern to Southern Italy, and is normally eaten as a second course for special occasions.

The Bauletti shape is exclusively registered to 'Divine Creazioni', inspired by a classic fresh filled pasta format. As a matter of fact, the edge is ridged in the same way as pasta cut with a pasta wheel called a "spronella". The size of each piece is designed to hold a generous amount of filling without losing the balance with the dough, which is made with eight eggs for every kilo of semolina.

On top of this, even the packaging in trays with specially separated sections, which keep every single piece intact, "contributes to the premium quality of this range that once again enriches the menus of restaurants around the world," Tampieri concludes.

Surgital: ambasciatori del Made in Italy

Produrre in larga scala restando fedeli all'esperienza artigianale della pasta fresca fatta a mano. Questa la mission di Surgital. Nata nel 1980 come un piccolo laboratorio, l'azienda oggi produce ogni giorno 175 tonnellate di pasta fresca, 90mila piatti pronti monoporzione e 30 tonnellate di sughi in pepite. Distribuiti su scala internazionale. Ad Anuga 2023 (Colonia, 7-11 ottobre), l'azienda presenterà in anteprima due novità che arricchiranno la linea 'Divine Creazioni'.

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INSIGHT



Here are all the stages of the journey of 19 heifers to the mountain pastures. Almost 12 hours in the rain, cold and fatigue. A fascinating movement of animals and men that has been going on for centuries, at the beginning of every summer.

When the meadows in the mountains are “warmer”, and the rains have transformed the pastures into green expanses, full of the finest grass a cow could eat, the shepherds realise that it is time for transhumance. One of the oldest rituals of cattle-breeding is the movement of animals up from pasture to pasture, in search of the best grass and the coolest climate. But, as this reportage recounts, it is also a movement of men, the moment when solidarity and brotherhood between those who make a living from this work is at its peak.

Our journey takes us from the Serra Biellese to Oasi Zegna, a free-access nature reserve, the brainchild of Ermenegildo Zegna (Biella, Piedmont), founder of the world-famous textile company that bears his name. It is a paradise for people and animals, stretching for around 100 square kilometres, where life in the alpine pastures, mountain traditions, grazing animals and the rituals of cheese-making all alternate.

Alice Realini

È tempo di transumanza

Tutte le tappe del viaggio di 19 manze per raggiungere i pascoli di montagna. Quasi 12 ore fra pioggia, freddo e fatica. Un affascinante movimento di animali e uomini che si ripete da secoli, all'inizio di ogni estate.

08:00 p.m.

DINNER TIME

It all begins in Zubiena, in the Serra Biellese, on a stormy evening. This is where Erik Ferrero and Elena Mania's farm is located: 50 animals, consisting of adult cattle, heifers, calves, oxen and dairy cows for cheese, as well as pigs to make salami and hams. This is the result of Erik and his wife Elena's work, who together with their two children, Mirko and Greta, are the heart of the farm and, right in the centre of the property, they also have their home. Here, we have a hearty dinner before the transhumance, in the festive and hectic atmosphere typical of departures. In summer, the animals and the family all move to Oasi Zegna, a thousand metres higher up, to a pasture located in one of the most beautiful places in the Alps: Bocchetta di Margosio, which opens onto the Panoramica Zegna street and offers one of the most beautiful views of the Monte Rosa massif.

09:30 p.m.

THE FINAL PREPARATIONS

The time has come to set out for Sordevolo, a small town in the nearby Valle dell'Elvo where the 19 heifers we are about to leave with have been grazing for a few weeks. The sky confirms what has been feared since the morning: it will rain, at least for part of the night. So, before loading everything onto the two off-road vehicles that will escort us, we check that we have enough to cover ourselves and change into throughout the transhumance.

11:30 p.m.

ALL EYES TO THE SKY

In Sordevolo, we meet Mary, who welcomes us in her small kitchen. She has been retired for a few years, but she has always lived from farming and cattle-breeding together with her husband. Until the day when, during the transhumance, her lifelong companion collapses to the ground on the last climb. Mary tries to keep the cows, but it is not easy to do it alone. So, she sells them. But today, even though she is retired, she helps the young herdsman who bring the cattle to the pastures around her farm, and hosts them before they leave for the transhumance. This stop, however, is longer than expected. Very powerful lightning bolts strike right there, almost hitting the shepherds who, eyes to the sky, try to figure out when it will stop. But finally, the thunderstorm drifts away, a sign that it is moving.

00:40 a.m.



WE SET OFF

Suddenly, as in an ant colony, everyone sets off with a precise goal. Under the intense and relentless rain that keeps on falling, Elena counts and gathers the 19 heifers; Erik gives the final instructions to the group and then, scattered between Mary's kitchen and the cars, we put on our waterproof trousers, coats, and hats. The tension is palpable: departure is always a delicate moment. As soon as the wires delimiting the pasture are removed, the heifers will rush up the steep slope at full speed, and it will be essential to guide them and lead them in an orderly way towards the path that we will travel for many kilometres. The climb is very arduous and the animals – happy for the journey and the cool weather – run up at an incredible speed. We reach the road and line up, and each of us is equipped with a stick to direct the animals and prevent them from taking side roads or wandering into private gardens. It is incredible to see how gently resting the stick on their back is enough to direct animals of this size, without any effort.

02:40 a.m.

OUR FIRST STOP

It is mainly the shepherds who suffer during this long night. The rain and the cold do not bother the heifers, who trot happily towards their summer home. “They know we are going there,” Erik tells me. “Some of them have been going there for several years, some were born up in the mountains. And that is why they run – they know the best grass will be there”. We make our first stop, to let them eat in a meadow and, especially, so that people can take a break. Around us, everything and everyone is asleep; there is only the rain. And the bells of the heifers.



04:30 a.m.

MILKING BREAK

We arrive, in record time, in the town of Andorno Micca, in Valle Cervo. Once we have crossed this town, we will start to climb more steeply, including on mountain trails. So we stop to wait for dawn at the entrance to the village. While Erik takes a car they suitably left there and returns to the farm to milk the ten dairy cows – which will go up a few days later by truck – we prepare for a longer stop. Off-road vehicles and a tent set up under the trees are our bivouac.

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INSIGHT

06:00 a.m.

COFFEE BREAK

It is a cold, autumnal dawn. Covered by a tarp, we try to have breakfast with a courgette frittata, the inevitable biscuits and hot chocolate laced with whisky to warm us up a little. Almost like an angel, Cinzia – an artist who has rediscovered traditional terracotta work – arrives with an unexpected and very welcome gift: a glass jar full of hot coffee, freshly brewed with a moka pot, which gives us the energy to set off again.

06:40 a.m.



WE CROSS THE VILLAGE

The caravan sets off again and it is time to cross the village. It is a touching moment, with people coming out to the streets to greet us, but also a difficult one. After a lonely night, spent without meeting a living soul, we are surrounded by cars and morning traffic. Some people understand and wait for us to pass, others slip in and try to overtake the group, putting us in great difficulty. Fortunately, the skilful shepherds get us out of Andorno Micca without incident.

07:45 a.m.

THE LAST STOP IN THE VALLEY

Once we have crossed the village, it is time for one last stop. We stop at the edge of a large meadow where the heifers can eat and rest a little before the long climb. We are so soaked, that we can no longer even feel the rain that keeps pouring down. But the daylight makes the walk easier anyway.

08:30 a.m.

NOW WE ARE REALLY CLIMBING

Here starts the real ascent, first on an agropastoral vehicular road and then on a trail, up the dreaded "Pratetto". It is an increasingly steep path, with gradients that make it difficult even for off-road vehicles. We finally arrive below the mountains. From here, we continue alone – the cars cannot come with us and will wait for us at Bocchetto Sessera, from where we descend to reach the pastureland at Piana del Ponte. The climb is hard but the animals finally slow down and give us some respite, due to tiredness but, above all, to eat the good, fat grass that grows at the edge of this path, a track to follow between rocks and the streams formed by the rain.



11:00 a.m.



HOME AT LAST

From Bocchetta Sessera, which overlooks the panoramic road of Oasi Zegna, there is still an hour's descent into the woods, along a dirt road. Paola – who for some years now has been skilfully driving the off-road vehicle that opens the caravan, manoeuvring it very easily – follows us with the tools we need on the narrow hair-pin bends. Once there, the heifers eat some grass and then lie down to rest in the meadow. Now that it is over, the sun comes out, beginning to dry 12 hours of rain as, tired and happy, we head towards the home of another farmer, Maicol, who is hosting our festive lunch at the end of our transhumance. Elena pulls out of a white plastic crate everything we could wish for: bread and cheese, cold meats, pickled vegetables, savoury pies, frittatas, meat, sweets, biscuits and red wine. But there is no time to waste: the sun is high in the sky and we must go down into the valley to make hay.

And two weeks later... the cows arrive

In order to bring the cows to the alpine pasture to be milked twice a day, they wait until the end of school so that parents, children and animals can all be together in the mountains. For this reason, the ten dairy cows arrive two weeks later. At the end of another stormy night, at dawn, two trucks take them up the Panoramica Zegna street to Bocchetta di Luvera. Here, in about 20 minutes, we descend together to Alpe Margosio. There are only three of us because the cows, being more tame and accustomed to human contact, follow us effortlessly. "Their first job is to clean the meadow in front of the house. It would have been a waste to cut that good grass with the trimmer," Erik explains to me, laughing. As we talk, he observes the meadows around the mountain. "We will now mark out the pastures with the wires and rotate the animals, to use all the grass at the right time. Some meadows are better to use right away and others where, in August, the grass has long blades and satiates them longer. And each pasture gives different flavours to the cheeses. Every year is a bit different and each time you learn something new". 120 litres with two daily milkings and raw processing: Erik and Elena's alpine cheese season has begun.



Transhumance 2023: from Sordevolo (Biella) to Piana del Ponte
29 kilometres; 1,000 metres of altitude difference

The main characters

Led by Erik Ferrero and Elena Mania, here is who took part in the adventure:

The heifers

Gioia, Dora, Perla, Musca, Falispa, Morgana, Rus, Primavera, Dorina, Vispa, Gemma, Muschin, Cornetta, Sessera, Moru, Pometta, Perlo, Musco and Margosio

The people

Alice, Valentina, Daniela, Davide, Adam, Giovanna, Mirko, Maicol, Mary, Paola, Mussa and Mike

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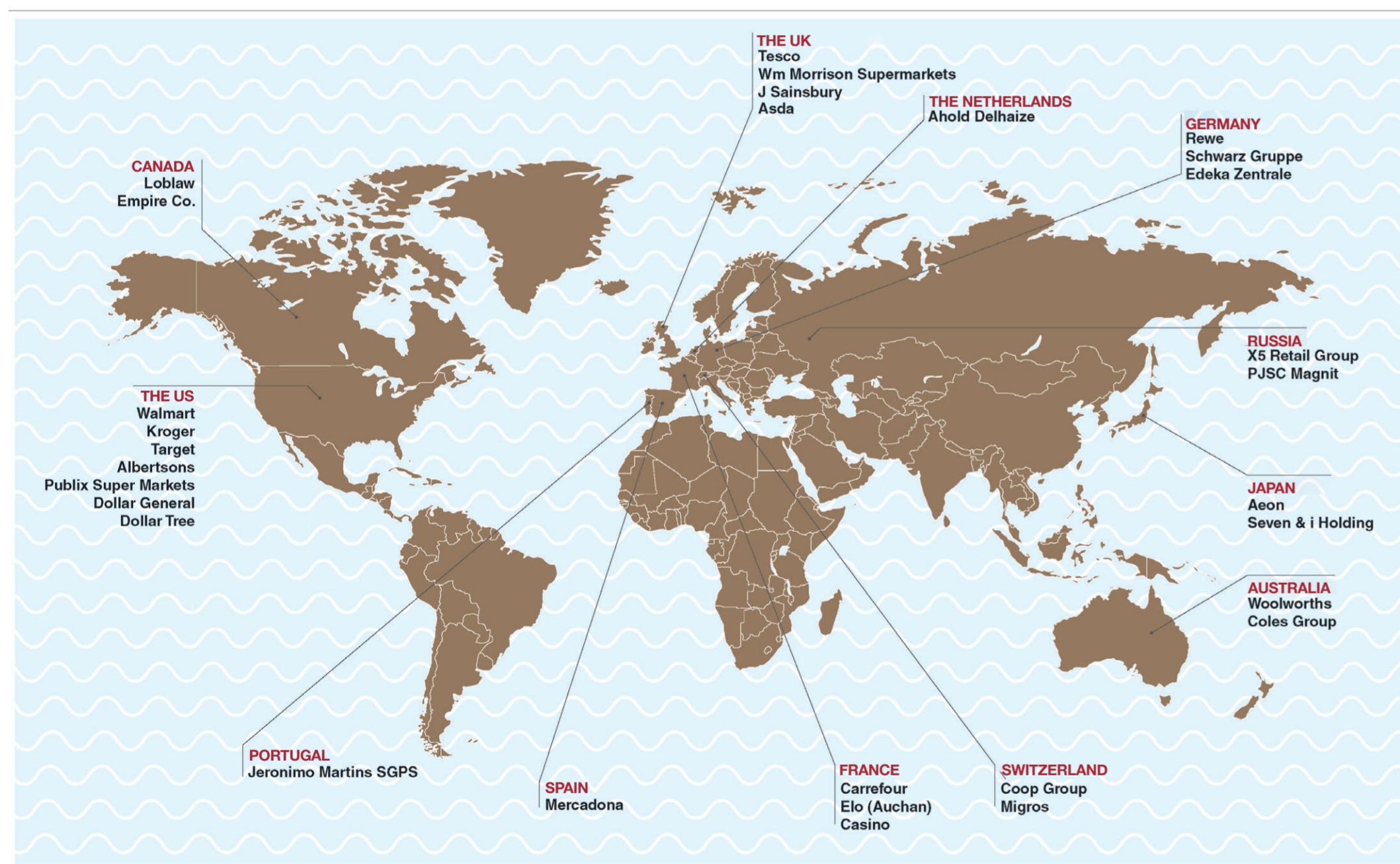
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MARKETS & DATA

Around the world: retail edition

An overview of the major international retailers. Outlined from the data contained in the latest Mediobanca survey. By total revenue, the podium is 100% American: Walmart, Kroger, and Target dominate the global ranking. American: Walmart, Kroger, and Target dominate the global ranking.



A quick tour of the world to discover the major international retailers. Our overview takes its cue from Mediobanca's 2023 edition of the survey 'Large-scale distribution, Italian and international'. Facts & figures regarding the main retailers in the world (only international ones, Italians excluded) refer to 2021. The analysis excludes players such as Costco and the other groups operating under the format 'club warehouse', hence only accessible via membership.

Dominating the global ranking, as for revenue, are all American retailers: the gold me-

dal goes to Walmart, immediately followed by Kroger and Target, respectively second and third.

The largest international projection instead is by Dutch Ahold Delhaize (78.3%), followed by Portuguese Jeronimo Martins selling primarily in Poland (76.2%), and by Japanese Seven & I (60.4% mainly in North America).

As far as sales per square meter of floor space champions, British J Sainsbury - with 15,500 euro per sqm - comes first, following in second place is Italian Esselunga with 15,300 euro per sqm.

Giro del mondo: retail edition

Una panoramica dei principali operatori della Gdo internazionale. Delineata a partire dalle informazioni contenute nell'Osservatorio Mediobanca 2023, in riferimento ai bilanci del 2021. In termini di fatturato, a dominare la classifica mondiale è un podio interamente a stelle e strisce: al primo posto sventa Walmart, seguito da Kroger e Target, rispettivamente in seconda e terza posizione. Il maggiore apporto della quota estera va invece all'olandese Ahold Delhaize. Quanto alle vendite per metro quadro relative al proprio mercato domestico è la britannica J Sainsbury a primeggiare.

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Products shown: PIZZA, focaccia, panzerotti, pizza boxes, pizza bags, frozen pizzas.

Bar chart showing production metrics:

Metric	Value
PLANTS	10
TONS/YEAR	100k
PRODUCTION LINES	13

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MARKETS & DATA

NORTH AMERICA

THE US

WALMART

The largest retailer in the world. In 2021 it generated a total revenue of over 501 billion euro, four times more compared to the second largest retailer in the world, Kroger. It operates 10,593 stores – of which 49.6% abroad, especially in Central America – and the total area exceeds 98 million sqm. In the US, the stores cover large areas: on average 9,300 sqm, yet the largest stores could also be up to 13,600 sqm.

KROGER

The retailer operates over 2,700 stores for an overall revenue amounting to approximately 121.7 billion euro, generated as follows: 91.5 billion deriving from retail sales; 13 billion from the gas stations; 10.9 billion from the network of over 2,000 pharmacies of the group; 6.3 billion from other activities, such as jewelries and third-party businesses. The second largest international retailer, last October, reached an agreement to acquire rival chain Albertsons for a total value of 24.6 billion dollars.

TARGET

Ranking third among the main international retailers is Target. In 2021 sales reached 92.4

billion euro (increased by +13.2% compared to the previous year and by +45.5% compared to 2017), yet only 20% results from the food&beverage sector. Target is only located in the US and in 2021 came first in Mediobanca's ranking as for ROI, amounting to 30.1%, followed by Italian retailer Eurospin (18.2%).

ALBERTSONS

In 2021 the retailer reported total revenues for 63.5 billions thanks to a network of 4,400 stores. After having reached the agreement with Kroger, as reported by some US magazines, the two retailers are said to have pondered to sell up 300 stores in the country to fend off antitrust challenges.

PUBLIX SUPER MARKETS

Only operational in America, it counts on 1,293 stores for a total revenue of 42.4 billion euro. It covers an overall area of 5.7 billion sqm, and the revenue per square meter amounts to 7,500 euro.

DOLLAR GENERAL

In 2021 the retailer recorded sales for 30.2 billion euro. It is only operational in the US, where the group counts on 18,130 stores. Among all the retailers examined by the report, the com-

pany records the lowest average area, equal to 700 sqm per store.

DOLLAR TREE

To be found mainly in the US, where it operates over 15,000 supermarkets, its revenue amounted to 23.2 billion euro in 2021. 237 stores are located in Canada.

CANADA

LOBLAW

50% owned by the Canadian holding George Weston, the company recorded 36.9 billion euro in 2021. Operational both in the food retail with 1,096 stores (551 franchises) and sales amounting to 26 billion euro, and in the drugstore channel with 1,342 stores and sales amounting to 10.3 billion euro.

EMPIRE CO.

It's the parent company of the food-retail business Sobeys, wholly owned by the Sobey family. In 2013 it acquired all the assets of the stores Safeway Canada – located in the western part of the country – for 5.8 billion euro. Today it operates almost 2,000 stores, including supermarkets, gas stations, drugstores, liquor stores, and convenience stores. 2021 revenues amounted to 21 billion euro.

ASIA

JAPAN

AEON

A 58.7-billion-euro turnover generated by a network of 20,000 stores. Almost 20% of the locations are located outside national borders, with a dense concentration in South East Asia. 90% of the turnover is achieved in Japan.

SEVEN & I HOLDING

The group counts on 35,000 stores, the majority of which convenience stores and superstores. 40% of the shops are situated overseas, especially in North America. The total revenue amounted to 57 billion euro in 2021, yet it also included gas stations revenues, accounting for 40%. The group places second in Mediobanca's ranking for the highest % change in turnover in 2021 compared to the previous year (+17%). Coming first in the category is Russian Pjsc Magnit.

OCEANIA

AUSTRALIA

WOOLWORTHS

The major Australian players, as well as one of the largest retailers in New Zealand. Sales recorded 35.7 billions in 2021 (11.9% generated by New Zealand where the group operates 184 supermarkets). Overall, the group boasts approximately 1,260 stores and 176 shops under the label Big W: the discount department stores selling books, toys, and clothing.

COLES GROUP

With 2021 revenues at 24 billion euro, it is the second largest food retailer in Australia. It operates 834 stores, plus 929 liquor stores and 717 gas stations, all in Australia.



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THE NETHERLANDS

AHOLD DELHAIZE

Founded in 2016 from the merger of Ahold and Delhaize, the Dutch group ended 2021 at 75.6 billion euro. It operates 7,000 stores, of which almost 70% overseas, mainly located in the US (27.5%). The American market proves to be strategic and indeed it accounts for 60% of the overall turnover of the group. Romania and Belgium altogether account for 10% of the turnover, whereas the domestic market accounts for 30%. Considering the large presence abroad, in 2021 Ahold Delhaize ranked first due to the largest international projection (78.3%). It owns 49% of the Portuguese retailer Jeronimo Martins Retail.

THE UK

TESCO

The total sale of Tesco amounts to 73 billion euro, making it the major retailer in the UK, holding a more than 27% share of Britain's grocery market. Extra 7.8 billion euro (91% generated in the UK and Ireland) derive from the gas stations and 1.1 billion from the banking. The network embraces 4,359 stores, plus 393 franchises. 14% of the stores are located outside national borders.

J SAINSBURY

Qatar Holdings owns a 15% stake in J Sainsbury, trading as Sainsbury's. 2021 ended with sales at 35.6 billion euro thanks to its 1,735 stores only located in the UK. And hereafter divided into: 598 supermarkets, 809 convenience stores, and 328 Argos stores, specialized in furniture, homewares and electricals.

ASDA

Up until 2021 it was owned by Walmart, then it was acquired by Eg Group, British retailer managing more than 6,000 sites including gas stations and fast foods. With 600 stores solely in the UK, Asda ended 2021 with sales at 28 billion euro. Average revenue per sqm amounts to 7,900 euro.

WM MORRISON SUPERMARKETS

Fifth supermarket chain in the UK, it was founded back in 1899 by William Morrison. The revenue at 16 billion euro generated in the first nine month of 2021 (21.4 billion year on year) derives from the 497 supermarkets and 58 convenience stores.

FRANCE

CARREFOUR

A 73-billion-euro revenue, over 13,000 stores (franchises included), and 58% of the revenue achieved abroad. In France Carrefour is the second largest retailer with a market share of 19.9% following Leclerc, which owns instead a market share of 22.6%. France, of course, is the major market with over 5,700 stores

and revenues for 35.3 billion euro in 2021, followed by Brazil (11.6 billion euro and 548 stores), Spain (9.5 billions and 1,474 stores), Italy and Belgium (both with a turnover of almost 4 billion euro). The retailer has recently reached an agreement in France with Louis Delhaize to acquire Cora and Match.

ELO (AUCHAN)

Elo, the new name for Auchan Holding starting from March 2021, owning 100% of Auchan Retail, achieved 31.1 billion euro in 2021, down by 0.8% compared to the previous year. 53% of the turnover is generated in France. Central Eastern Europe (27.6%) and Western Europe (18.8%) follow. In 2019 the group sold the Italian business to Bdc Italia (Conad has stake at 51% and Wrm group at 49%). In 2022 Elo sold Sun Art Retail Group, the company managing the business in China, to Alibaba.

CASINO

The French group Rallye is the holding company behind Casino, which is among the major retailers in the country. It ended 2021 with revenues at 30.5 billion euro (down by -4.3% compared to the previous year). Overall it boasts 11,525 stores, of which over 7,600 franchises. 27.8% of the locations is situated overseas, in Colombia (2,063 stores) and Brazil (1,021 stores). The foreign markets account for 47.3% of the turnover. In 2022 the consolidated net debt of the group amounted to 6.4% billion euro.

GERMANY

REWE

The Rewe is a retail co-operative group based in Cologne, which closed 2021 at 69 billion euro, of which 39 billion derived by the retail sales, almost 27 billions from the wholesale business (half generated by the subsidiary Lekkerland), and 2.7 billions from other activities. 32.5% of the stores -15,554 overall - is located abroad: in Austria, Czech Republic, and Italy mainly with the retailer Penny.

SCHWARZ GRUPPE

German group including the subsidiaries Lidl Stiftung and Kaufland Stiftung. The first, among the main protagonists of the German retailers, in 2021 recorded a 66-billion-euro turnover through its 11,800 stores, 70% of which are located in Europe. Whereas the second has ended the year with 25.5 billion euro with 1,500 stores, 50% situated abroad.

EDEKA ZENTRALE

It consists of nine regional co-operatives, each owned by entrepreneurs with a 50% stake and for the remaining 50% by Edeka. It's the first player in the country as for the grocery sector - present only in Germany - with a 43.9-billion-euro revenue in 2021. Its foundation dates back to 1898.

SWITZERLAND

COOP GROUP

The co-operative is the largest retailer in Switzerland. In 2021 total retail and wholesale sales reached 29.8 billion euro. Overall retail space amounts to 3.3 million sqm for a total of 2,398 stores (219 wholesale).

MIGROS

It is the second largest retail chain in the country. The revenues amounted to 26.8 billion euro in 2021, of which 8.8% generated abroad, in Germany mainly. The group is indeed operational in Germany because in 2013 it purchased approximately 300 stores under the Tegut umbrella.

SPAIN

MERCADONA

In the grocery sector the group holds a market share of 25%, ranking before Carrefour (9.6%), Lidl (6.1%), Grupo Dia (4.9%), and Grupo Eroski (4.2%). In 2021 the revenue amounted to 25.2 billion euro thanks to a network of 1,662 stores, of which 29 in Portugal (the opening of the first store in the country dates back to 2019).

PORTUGAL

JERONIMO MARTINS SGPS

The Group holds 51% of the network of supermarkets and hypermarkets Jeronimo Martins Retail (JMR), the remaining part is owned by the Dutch Ahold Delhaize. With a 2021 revenue at almost 21 billion euro, it has a strong presence abroad (76.2%). It indeed operates in Poland (72%) and Colombia (16.7%). Apart from 4,000 supermarkets, it also includes many cash&carry, drugstores, pharmacies, and some shops selling sweets and cafeterias.

RUSSIA

X5 RETAIL GROUP

It is Russia's largest food retailer, listed on the London Stock Exchange and the Moscow Stock Exchange. The revenues at 25.8 billion euro in 2021, increased by +11.5% compared to the previous year. The network comprises 19,000 stores.

PJSC MAGNIT

The second largest food retailer in Russia is listed on the London Stock Exchange and the Moscow Stock Exchange too. As for the number of stores, it surpasses X5 Retail Group: Pjsc Magnit as a matter of fact counts on over 26,000, of which 18,600 are convenience stores, 470 supermarkets and almost 7,000 drugstores. In 2021 revenues amounted to 21.8 billion euro.

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THE INTERVIEW



“What is missing between industry and retailers? Transparency”

The Conad-Auchan operation, private labels, inflation and the Egalim 2 law. French and Italian grocery retail in an interview with the former buyer, and now trader, Rodolphe Castelain.

French by birth and Italian by adoption, Rodolphe Castelain was senior buyer of Auchan Italy until its acquisition by Conad. Expert in Private Labels, he transferred his deep knowledge of the grocery retail sector to a new company, Alphatrader, that brings Italian food products to French supermarkets.

How did your career in retail begin?

When I arrived in Italy I didn't speak the language. So I asked the Chamber of Commerce for a list of French companies active in Italy and joined the Castorama do-it-yourself chain. After becoming department head, I was contacted by Auchan Italy for the position of junior buyer. And a long lasting adventure began.

You have been buyer for Auchan Italy for more than 20 years. What was your job position?

I had to make a six-month experience in the stores before moving to the headquarters, and that's what I did. At first, I was buyer for the non-food sector, in particular for the perfumery department, then I moved to beverage and finally to food. I became Senior buyer and responsible for Western European countries.

You have been buyer for a very long time, considering the high turnover rate that is usually associated with this position.

That's true. And it allowed me to develop a great knowledge of the market and its dynamics. In particular with regards to my specialization: Private Labels.

So you have witnessed the stunning growth experienced by PL over the past decade.

Definitely. In the early years the leading Italian chain in the Private Label business was Ipercoop, which had a share of around 18-19%. I remember that the goal was to reach 30%.

I think that the only Italian chain to have reached and even exceeded such market share is Conad. With regards to Conad, you have experienced in first person its acquisition of Auchan Italy. What was it like from the inside?

I remained until October 2020, to oversee the contracts in place. What was it like from the inside? An unclear passage. And also poorly considered by the media given the importance of the operation...

Tell us more.

With the Conad-Auchan operation more than 3,000 people remained without a job, and yet nei-

ther the press nor the television considered it. They talked about the Whirlpool case in Naples, and the fate of its 700 workers, for months... I still remember the enthusiastic tones of the Italian newspaper Il Sole 24 Ore because Conad had bought a French company. But the 3,000 employees left home were Italian, not French... In any case, this opened up a whole new world to me. One door closes and another opens, right?

Absolutely. What happened next?

I started scouting Italian food companies. I wanted to bring Italian products to France. In January 2021 I opened my own company and started a new adventure.

What retailers do you work with?

Mainly E.Leclerc, Auchan and Intermarché.

For what kind of products?

Deli meats, fresh and dry pasta, cheeses, coffee and veggie drinks at the moment. My specialization has always been Private Label, so the projects I am following go in this direction. I am negotiating with Auchan for the supply of grana and parmigiano, as well as for coffee capsules. For E.Leclerc's 'BioVillage' PL range we have created a line of veggie drinks, while with Intermarché we are in negotiations for the supply of fresh pasta. With the price increase, the situation has become a little more complicated...

There is high attention, in Italy, with regard to current price dynamics. How do French retailers deal with this matter?

First of all, any negotiation between retailers and suppliers in France is regulated by the Egalim 2 law.

How does it work?

Egalim 2 is the updated version of the Egalim law created in 2018, made by the government to balance commercial relations between manufacturers and distribution. The basic concept is that any production cost, is its fixed or variable, must be integrated into the contract in order to protect, above all, the earnings of the primary sector, namely farmers and breeders, which is susceptible to strong changes in the cost of raw materials.

So what happens in critical moments like the current one?

If during the negotiation all costs - energy, raw materials, packaging and so on - are written in black and white, also with reference to market indices, the price of the finished products is established accordingly.



Rodolphe Castelain



“Cosa manca nei rapporti tra Gdo e industria? Trasparenza”

L'operazione Conad-Auchan, la Marca del distributore, l'inflazione e la Legge Egalim 2. Il retail alimentare francese e nazionale in un'intervista all'ex buyer e oggi trader, Rodolphe Castelain.



It sounds easy...

Of course a 10% increase cannot happen overnight, but it can be adjusted little by little. For a few years now, there has certainly been more respect and attention for those supply chains - such as that of meat or milk - where the change in the cost of raw materials is strong. The main difference between Italy and France, in this sense, lies in transparency.

It lacks in Italy?

In France, every cost is written down in black and white and can therefore be verified. In Italy, manufacturers often refuse to openly declare all their costs, with negative consequences on negotiations. I'll give you an example: I am negotiating, as I was saying, for a supply of grana and parmigiano and for each item they ask me for: price of the raw material per kilo and market index, cost details per piece for a 60 or 100 grams bag, including the cost of the pack, labor, electricity and so on. Result: negotiations are not endless. You simply look at the data.

Which are the most performing French retail chains?

E.Leclerc without a doubt. Every quarter it grows in market share, it has already reached 25%, with a yearly turnover of 44 billion euro. More than the first two Italian grocery retailers combined. Second in terms of market share is Carrefour, which however is stuck at 20%. Followed, on a growing trend, by Intermarché at 16% and the discounters Aldi and

Lidl, which are doing very well in France. The same certainly cannot be said of Casino, that has already sold most of its stores in the country.

How is the relationship between E.Leclerc and its suppliers?

Excellent. E.Leclerc is a truly professional group, even in the relationship between buyers and manufacturers, despite moving impressive volumes of goods. I will always remember a negotiation made on behalf of a mozzarella producer with the Copernic purchasing central, attended by representatives of E.Leclerc, Coop Italia and Group Dalhaize. Only E.Leclerc, for a 125 gram mozzarella, asked for 8 million pieces a year. The factory manager got scared! (smiles, ed.).

Mozzarella, if I'm not mistaken, is also the most exported Italian product in France...

Yes, it is undoubtedly the best-selling product by volume but it is third in the value ranking. First is fresh pizza, followed by frozen pizza.

So how is the outlook for the export of Italian food to France?

After years of growth, a decline in exports was recorded in 2022 mainly due to inflation. Today the total food import - excluding wines - is worth 1.3 billion, down 2.6% on the previous year. In particular, pasta was heavily affected by the price increase. But in France, Italian gastronomy remains extremely valuable.

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DAIRY

Gorgonzola PDO unites generations

In 2022, exports grew by 1.9% and, at the beginning of 2023, production increased by 7.26%. After a challenging year, the consortium has now decided to target young people. Here are the figures presented at the National Members' Meeting.

On 25 May 2023, the National meeting of members of the Gorgonzola PDO protection consortium was held at the Westin Palace in Milan. The event was dedicated to the point of contact between generations, and it was called "Generations G: Sharing to grow". Here is an overview of the numbers achieved in 2022 and early 2023 by this Italian excellence.

Production: a positive start to 2023

At the beginning of 2023, the production of Gorgonzola PDO achieved positive results: data (source: CLAL) show steady growth, with April production standing at 1,760,117 wheels (+7.26% compared to the same period of the previous year). These results are promising after the drop in 2022. Last year, the 39 member companies of the Gorgonzola PDO protection consortium had a total production of 5,048,311 wheels. In addition to the customary slowdown in the warmer months, an unusual production depression was recorded between October and November (430,241 and 431,194 wheels, respectively), before picking up again in December (458,502 wheels). Lombardy and Piedmont – which experienced a drop compared to 2021 – recorded negative results: -2.73% the former (a total of 3,627,372 wheels) and -7.11% the latter (1,420,939 wheels). These figures are set in a national context in which the general production of Geographical Indication cheeses slightly fell compared to the previous year: Grana Padano -0.61%, Parmigiano Reggiano -2.17%, Asiago -5.13%, Taleggio +1.36%. Going back to Gorgonzola PDO, a drop was registered in the production of the organic type (-20.93%, for a total of 42,225 wheels, representing 0.84% of the total production) and the spicy type (-8.14%, still representing 12.47% of the total production).

2022: volumes down, exports up

The drop in 2022 also affected the volumes, which went down by 7%. This was caused by the decrease in the number of buyers (650,000 fewer households) and by the contraction of the average purchase, against growth in value by almost 2%. The large-scale retail trade registered the best performance as a purchasing channel: volume 55% and value 56.3%. Traditional specialised retailers account for 1.3% of volumes and the channel consisting of street vendors/markets stabilises at around



Gorgonzola DOP, un ponte tra le generazioni

L'export ha segnato nel 2022 una crescita dell'1.9% mentre nei primi mesi del 2023 la produzione è aumentata del 7,26%. Dopo un anno complicato, il Consorzio di tutela ha deciso di puntare forte sui giovani. Ecco i dati presentati nel corso dell'ultima Assemblée nazionale.

22%. The purchasing methods remain unchanged: take-away, fixed weight and variable weight at the counter share the market almost equally. On the other hand, 2022 was a year of growth for exports: 25,191 tonnes of Gorgonzola PDO were sent abroad (+1.9% compared to the previous year). Of these, the amount that remained in Europe increased by 2.7% (reaching 21,733 tonnes), while those exported outside Europe dropped by 3%. In particular, exports to France grew (+2.31%), but exports to Germany decreased by 11.8%; these two countries account for 46.2% of total exports of the product. Exports to Luxembourg grew exponentially (+199.9%), and there were excellent results in Hungary (+57.72%) too. Outside the European Union, growth was recorded in Japan (+29.51%), the United Kingdom (+4.39%) and South Korea (+5.23%).

The president's comment

In the light of the data, consortium president Antonio Auricchio commented: "The year 2022 was the most difficult in the last decade, with an adverse situation that weighed on all the most important cheeses. However, I am very proud that we have not given up on quality, and never will."

"The positive trend of this first part of the year makes me more confident. Gorgonzola PDO remains an ambassador of Made in Italy in the world, being present in 86 different countries. Our new international campaign focuses on sharing, on social media, in Italy and abroad, and we are deeply focused on reaching young and very young people, who are increasingly interested in cuisine and agrifood excellence."

The consortium is increasingly focusing on a young audience. Gorgonzola, after all, boasts some of the highest social engagement among the Italian Protected Geographical Indication products, with 589 thousand mentions on Instagram.

But the Internet is not just for entertainment: to fight counterfeiting and spread the culture of authentic food, the consortium also plays an information role, publishing news and articles in 11 languages on the Gorgonzola.com website and social media profiles, which are all accessible to everyone for free. This is an opportunity to discover the quality of the product and how to distinguish it from imitations, and also to learn about its properties and history.



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Porchetta Forever



Is it from Lazio? No, the Umbrians are offended and say: it is ours. Is it from Umbria, then? Of course not: in Abruzzo they beg to differ. So, can we say it is from Abruzzo? Not a chance: in Marche, they disagree. The only ones who say nothing are those in southern Tuscany, who simply enjoy it. It is a fact: in Italy, the land of a thousand bell towers, at least four regions are competing for the birthplace of porchetta. And if you try it, it is easy to understand why: it is one of the tastiest, most loved and appreciated products of the great Italian pork culture. As Paolo Massobrio – creator of Il Golosario (the food guide to the thousand and more good things in Italy) and, more recently, of the successful fair Golosaria – sharply said a few years ago, the original homeland of porchetta is what for many centuries were the Papal States. The States of the Church included Romagna, Marche, Umbria and Lazio – all territories where porchetta was, and is, at home. The only exception was, once again, the province of Siena, which still offers a tasty variation.

When did it first appear?

But when did porchetta actually appear? On this point, sources are strangely in agreement: the origins date back to ancient Rome, and perhaps even earlier, to the Etruscans. The tradition of cooking duly spiced whole piglets, including the head, over a fire is well documented. The supreme Apicius, perhaps the most famous Roman cook, records at least two recipes. All subsequent variations of porchetta, including contemporary ones, derive from that ancient culture. Especially in Lazio, and particularly in Ariccia (Rome) – one of the towns that are most closely associated with the product – they are very proud of this heritage. But then came the claims, in the form of testimonies and treaties that began to be read in the Renaissance, so the plot thickens. In Campli (Teramo province) – where a traditional festival celebrating the local porchetta recipe has been held since 1964 –, they use to their advantage the ancient findings in the necropolis of Campovaiano, as well as municipal specifications dating back to 1578 regulating its production. In Costano, a hamlet of Bastia Umbra (Perugia), they argue that in their area the canons of the Assisi cathedral commissioned the cooking of suckling pigs as far back as the Middle Ages, and provide evidence that a similar custom has existed for at least 500 years. However, trying to figure out who came first is an idle exercise, so-

mewhat pointless.

It is better to admit that there has been some sort of evolutionary convergence, and that porchetta is common to neighbouring lands that are culturally very similar.

A marriage of pork and spices

What characterises porchetta? First of all, the pig. According to Aldo Iacomoni – a great porchetta maker from Monte San Savino (Arezzo), interviewed by Stanislo Porzio in the beautiful book 'Cibi di strada' (Street Foods, TN), published by Guido Tommasi Editore in 2008 – the ideal weight is 90 kg. As Iacomoni explains, a 90-kilo pig weighs about 70 kg when it is prepared for cooking, and then reduces to 35-40 kg once it is cooked. Cooking is also very important: it takes many hours, first at a high temperature (at least 250° C) and then lower. This is of course in the case of using a wood-

fired oven, as some producers, even the largest, still do. And what about the stuffing? What is inside the pork? Spicing is the closely guarded secret of every porchetta maker. The percentages of herbs and salt that are mixed differ from producer to producer: all of them have their own recipe, which they obviously consider the best and most suitable for an exceptional product. The staple is the "green part": sometimes it is rosemary, sometimes it is wild fennel, and more often both. According to many authors, wild fennel is the real distinguishing feature of porchetta. In the Marche region, any meat cooked with large doses of wild fennel (e.g. rabbit) is defined as "in porchetta", and many prepare other parts of the pig, such as the chine, in the same way. There is also garlic: it can be left out, but that would be a pity, and in fact, those who care about tradition the

most use plenty of it, sometimes "in camicia", i.e. with its outer peels. In many types of porchetta, when the slice is cut, you may notice parts of a different, darker colour: this depends on another tradition, that of stuffing the piglet also with its liver, and with other poor parts. Needless to say, with this addition porchetta gains a stronger, more personal flavour, but not everyone likes it. Another absolutely fundamental element is also the rind. With long cooking, it becomes golden, until it takes on a brownish colour. And if it is a freshly roasted porchetta, its crunchiness is a source of great

excitement. It is common practice to pierce porchetta at the belly with a knife, in order to release the fat. This expedient has generated very interesting results. For example, in Grutti (Perugia), another town where porchetta is a source of pride, they have the traditional Cicotto, which is also presided over by Slow Food: entrails, trotters and poor parts of the pig are placed in a pan under porchetta while it is cooking, so that its fat, soaked in spicy liquids, drips over them.

The odd one out is from Treviso

And let's not forget porchetta from Veneto. It is

simply a modern and very different recipe, though no less tasty. It is a thigh ham, with or without bone, that is cooked with its rind. It was invented in 1919 by Ermete Beltrame, who decided to propose a dish reminiscent of similar masterpieces of Central European tradition in his Treviso pub. Today, Porchetta Trevigiana has rightly become a cornerstone of the industry. When you taste it, it is slightly less fatty than the classic porchetta. What to pair with all types of porchetta? Bread and red wine, although in the Castelli Romani area, they also pair it with white wines such as Frascati.



Porchetta Forever

Umbra, laziale, marchigiana, abruzzese? La ricetta del maiale cotto intero è contesa da un po' tutta l'Italia centrale, oltre a essere molto antica. Ma i punti fermi sono gli stessi per tutti: maiale, rosmarino, finocchio. E poi c'è la variante trevigiana...



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REPORTAGE

Summer Fancy Food: what a great Show!

From our reporter in New York, Matteo Napolitano



The New York event, held on the past June 25-27, once again proved the crucial role it plays for the food & beverage industry. With Italy, and its more than 300 exhibitors, always on the frontline.

Three full business days, free from large crowds and opening times – from 10 till 16 (on the third day until 15) – that leave no time to waste. The Summer Fancy Food Show remains a strategic meeting point and the length of this yearly event is considered by most companies as “the ideal one”.

More than 300 Italian exhibitors, well organized and properly located to catch the visitor's attention, attended the 2023 edition. Again this year the Collective set up by Donato Cinelli (Universal Marketing) showed itself off, but also independent exhibitors declared themselves very satisfied with the results achieved. Just to name a few: Levoni, Parmacotto, Lactalis and Veroni.

The Italian Agriculture Minister Francesco Lollobrigida took part in the traditional ribbon-cutting of the Italia Pavilion, and on the occasion officially announced the candidacy of Italian cuisine to be on the Unesco Intangible Cultural Heritage list. His commitment for the industry is certainly worthy of praise, and yet he could have avoided some over-the-top statements: “We can help our American friends by teaching them to eat better and providing them with the right tools to understand the value of quality”, he said in New York. Honestly, rather than supporting our industry such an arrogant attitude risks to bother both importers and distributors.

Plenty of them were spotted on the show floor, including Oak View Group (OVG), the Spinneys supermarket chain, which operates throughout the UAE; the specialized importer of fresh Italian food Ace Endico, Atalanta Corp. - that to Mediterranean and South American food dedicated the PL brand De Medici - and food service chains like Major Food Group.

Fancy Food: una fiera di consolidamento

La manifestazione, in scena a New York dal 25 al 27 giugno, si conferma un appuntamento strategico per gli operatori del food&beverage. Più di 300 le aziende italiane presenti.



From left: Giulio Bellei, Alfredo Balvanera, Alan Green



From left: Alice Schenetti and Sylvie Incognito



Peliciano Mottino and Antonietta Pesare



From left: Vania Mozzato, Lisa Minelli, Lorenzo and Ludovico Levoni



Gianluca Ricci



Antonio Auricchio



From left: Matt Guglielmelli, Judith White and Simone Bocchini



Antonio Rotunno



From left: Paolo Licata, Francesco Marrocci



Alice Vezzaro



From left: Dalma Benedetta Battisti (Aldop), Erika Belmonte



From left: Pamela Farioli and Cristina Tucci



From left: Piernaria Saccani and Dalma Benedetta Battisti (Aldop)



From left: Carlo Mangini, Giuseppe Scarica, Nicola Bertinelli, Marco Prandi

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REPORTAGE

Consorzio Prosciutto Parma



From left: Paolo Traneli and Simone Calzi

Consorzio Prosciutto Toscano



Umberto Viani

De Cecco



Michael Fava (second from the right) and the team

De Nigris



Fabrizio Cuomo and Michela De Nigris

My Cooking Box



From left: Serena Gamba and Milena Vismara

Opas



Francesca Noaro

PaneAlba



Nicolò Graudo and Tiziana Massarone

Parmacotto Lct



From left: Alberto Minardi, Andrea Schivazappa, Giovanni Zaccanti

Delicius



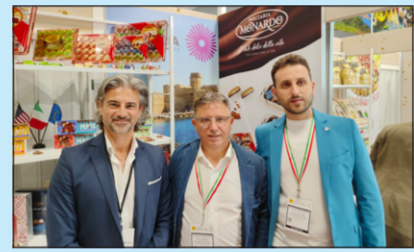
Alessandro Farneti

Devodier



Michele Devodier

Dolciaria Monardo



From left: Francesco Marino, Domenico and Antonio Monardo

Fattorie Garofalo



Riccardo Fichera

Pasta Armando



The team

Pedon



Paolo Pedon and Clara Palagiano

Pomì



Daniele Barbuto

Ponti



Elena Cattelan

Ficacci



From left: David Dottorini and Giuseppe Ficacci

Filippo Berio



From left: Ken Dumm, Jason Morneau, Kelly Evers, Young Koepke, Marco Auriti, Chuck Handford, Carlo Gualdoni

Galloni



From left: Luca, Mirella and Federico Galloni

Garofalo



From left: Andrea Sammino, Alessandro Capuano, Piero Signorini

Raviolificio Lo Scoiattolo



Melissa Zardi

Rigoni di Asiago Usa



From left: Claudia Giaccaglia, Joshua Joslyn, Cristina Rigoni

Rizzoli



Cinzia Romeo

Rossogargano



From left: Domenico Demaio, Giuseppe Stasi

Generale Conserve



Giacomo De Ferrari

Granarolo



From left: Marco Martino (CEO Unconventional) and Matteo Bertolin

Granterre



From left: Paolo Ganzerli, Massimiliano Milani

Guffanti



Davide Guffanti Fiori

Rovagnati



Giovanni Quattrone

Ruliano



From left: Catì Gomez and Carlotta Montali

Saclà



Alberto Bretti

San Michele



Daniele Cremenonesi

Guglielmi



Saverio Guglielmi

Gustibus



From left: Giada Casabona, Marino Stancampiano and Cristina Trovato

IDB Borsari



Claudio Verri

Inalpi



Florian Guida and Gabriella Bollino

San Nicola



Mattia Zamboni

Sgarzi Luigi



Nadia Ancarani, Antonio Rullo

Surgital



Arianna Testi and Alberto Bondanelli

Tarall'Oro



Antonello Di Bari

La Doria



Mariachiara Migliaro and Diodato Ferraoli

La Fabbrica della Pasta di Gragnano



Egidio Donadio and Martina Moccia

Levoni



Nicola Levoni

Martelli



Nicola Martelli

Tartuflanghe



Barbara Bosini

Tedesco



Maria Laura Bedini

Terre Di Puglia



Luciana De Bellis, Nicola Visaggio and Massimo Sadino

Valentino



From left: Cyrus Settineri and Giancarlo Valentino

Martino Rossi



Manuel Sirigiovanni

Mengazzoli



From left: Severino Zardini and Marco Nodari

Molino Noli



Dina Glavcheva and Cristian Caramia

Monti Trentini



Maria Vittoria and Fabio Finco

Veroni



Maria Vittoria Zini

Vicenzi



Simona Marolla and Christian Saldi

Vitali



Giorgia Vitali

Zanetti



From left: Attilio and Paolo Zanetti



DISCOVER

A contemporary soul in an ancient body



Secolare? No: contemporaneo

Il Marsala è il vino siciliano più particolare, e al supermercato difficilmente manca. Le sue origini risalgono alla fine del Settecento, e oggi si propone con vari gradi di dolcezza e di invecchiamento. Tutti quanti si prestano a essere consumati a fine pasto, oppure a farci lo zabaione.

Marsala is the most unique Sicilian wine, and it rarely lacks from supermarket shelves in Italy. Its origins date back to the late 18th century. And today it comes in a variety of options defined by different ageing time and sugar content.

Marsala, possibly the most unique Sicilian wine of all, and what resembles the most 'complex' products like Sherry or Port wine in Italy, in spite of everything still has its place. Indeed, even on supermarket shelves Marsala comes almost always in at least two different options. Without a doubt, its role is mined by a certain disregard of the modern consumer: many, especially in the North of Italy, believe Marsala is mainly a cooking wine, used to simmer meat or risotto alla Milanese or to make eggnog, for which Marsala is the undisputed protagonist. Yet, back in time but even today, Marsala first of all is a dessert wine, or perhaps a late afternoon wine.

Born in the UK

Its origins are very ancient and, at times, fade into legend. Let's picture the Sicilian Coppola cap. Have you ever noticed how similar it is to the English cloth cap? A coincidence? Not really, the Brits have had a sharp interest in Sicily for centuries. Hence, Sicilians too, in order to be chic and international, ages ago adopted the English cap. The Brits, in exchange, as a matter of fact invented modern Marsala.

In 1773 a man called John Woodhouse arrived by boat to Marsala's harbor, allegedly to do business. Like every good Brit, deal after deal, he felt the need for a drink. And what did he come across? A wine that local farmers called 'Perpetuo'. To produce such a wine, they used the same barrels year by year. So much so that none knew how old the very first harvest was. Sir John was pleasantly impressed, that wine reminded him of Sherry. He decided to take some back home with him, therefore in order to preserve it better, he added spirit.

One wine, many wines

And that's basically how modern Marsala is made. A wine fortified with a spirit, which according to the DOC discipli-

nary should boast an average alcohol content of 17.5 degrees, which goes up to 18 for certain varieties. Talking about Marsala wine, many are the options available. First of all, color plays a big role: Marsala can be Amber, Gold, or Ruby. The grapes used to produce Amber and Gold varieties are the same: Grillo, Catarratto, Inzolia, Damaschino, single or mixed, which are all white berry grapes. Ruby Marsala instead requires red berry grapes: Perricone, Nero d'Avola and Nerello Mascalese. And this is a first distinction.

The alcoholic volume dictates the second. The wine is fortified with neutral grape spirit or wine brandy, as it was originally: in this case, we have Marsala Virgin, which can be Reserve (ten years of ageing). Instead, if the wine is also fortified with cooked must or the traditional mix of alcohol and must, the other types will be: Marsala Fine (aged for a year); Marsala Superior (aged two years in wood barrels); and Marsala Superior Reserve (four years minimum spent in wood barrels). Gold Marsala, which requires the same grapes as Amber Marsala, never includes cooked must, which provides a darker color, precisely amber. Nor Ruby Marsala includes cooked grape must.

The latter distinction is provided for by the sugar content: Secco is dry Marsala containing a maximum of 40 g/l of residual sugar; Semi-secco Marsala is semi-sweet or off-dry and it contains between 41 and 100 g/l of residual sugar; whereas Dolce is sweet Marsala containing 100 g/l or more of residual sugar.

In a nutshell, the name 'Marsala' embraces wines with widely different characteristics: more or less sweet, and more or less characterized by the traditional oxidation which develops in longer ageing processes, and which is the landmark of this multifaceted product. Furthermore, there is a collateral, yet significant chapter: the so called 'Marsala all'uovo'. These are aromatized wines made of Marsala, with various 'extras', the most common are egg and almond.

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SCENARIO

Direct line with Janusz Wojciechowski

Meat sounding, green transition, Designations of origin, Common Agricultural Policy. An interview with the EU Commissioner for Agriculture on the most pressing issues for the European food system.

Heading towards the 2024 European Elections, we discuss the most relevant topics for the food industry and the related legislations with the EU Commissioner for Agriculture, Janusz Wojciechowski.

Italy and now also France have introduced a law to sanction the so-called 'meat sounding'. Is the topic of vegetarian or vegan products using names that refer to different raw materials also on the EU agenda?

First of all, I would like to stress that the first principle of food labelling is that consumers should not be misled about the product they buy and consume. That being said, should there be certain terms misleading for consumers, EU countries are empowered to take action. This is planned at EU level in the legislation on food information to consumers (regulation (EU) No 1169/2011). This Regulation recalls that food information shall not be misleading as to the characteristics of the food and, in particular, as to its nature and composition. Member States have the primary responsibility for the enforcement and the correct implementation of the legislation. The protection of dairy terms stems from history: when competing products were developed, like margarine, the EU legislator intervened as of 1987 (Reg. 1898/87) to make sure that consumers were properly informed and could make well informed choices. This was done by specifically protecting dairy terms in agricultural legislation. Margarine cannot be called butter and the use of the term milk is strictly regulated and limited. The development of vegetal based alternatives to meat is much more recent and occurred at a time where we already had an overall legislative framework in place for food labelling, the regulation I mentioned earlier. We consider that it is still fit for purpose and rely on EU countries to properly enforce and implement it in the interest of protecting consumers.

In Italy there is a widespread conviction that the ecological transition desired by the EU is extremely costly and too fast. As far as agricultural policies are concerned, which steps will be taken more quickly, and which long-term choices still need to be weighed up?

Italian farmers have had to suffer from drought and also from floods in certain regions this summer. Rising temperatures and atmospheric CO2 concentration, changes in precipitation patterns and more frequent extreme events influence crop yields and livestock productivity in Europe, but also water management and conditions for transport and storage. The multiplication of extreme climate events has a great impact on farmer's work, their income and the food production. So there is no question that food security goes hand in hand with environmental actions. In this respect, the current Common Agricultural Policy (CAP) is the most ambitious ever when it comes to green achievements. Farmers are part of the solution when it comes to mitigating the effects of climate change and adapting to a new reality. The agricultural sector has already decreased its emissions while maintaining, and sometimes even increasing, its productivity! So I see all the efforts made by farmers and I thank them for it.

Some changes take longer than others...

That's true. For this reason we are no longer following a 'one-size-fits-all' approach. Each country could design its CAP Strategic Plan and make the best choices to address its own local and national issues. It is quite obvious that Finnish farmers do not face the same environmental challenges than Italian farmers. This should make certain measures less burdensome and more understandable for farmers. For example, Italy has earmarked over 10 billion euro of its CAP Strategic Plan's budget for interventions aimed at the climate and environment. More than thirty vo-

luntary schemes that compensate farmers for the additional costs and income loss deriving from the application of more environmental and climate-friendly practices. These include reduced use of fertilisers and pesticides, farming techniques preserving biodiversity, as well as soil conservation practices.

Are research and innovation important topics, with this regard?

Innovation and research are key. For example, we can pay farmers to change farming practices and use less pesticides. But when this translates into crop failure we reduce food production. This is not efficient! So we must also invest in innovation: farming practices that incorporate agro-ecology to reduce pesticide application with reduced risk for crop failure, more resistant crop varieties, precision technologies to reduce application of pesticides, etc. The current programming period 2023-2027 has increased the European funds dedicated to research. Now, we must also make sure that farmers receive adequate advice and guidance to adopt innovations in farming practices.

It often happens that innovation remains relegated to the mere field of research.

There are still many barriers to a greater spreading of knowledge, innovation and digitalisation. The current CAP will continue helping to overcome these barriers, by, for instance, providing support for projects within the European Innovation Partnership for productivity and sustainability, and offering funding for advisory

services as such. The CAP can also support the investments in new agricultural technologies, like precision farming, and can support the change in practices that often accompany these new technologies. The Italian CAP Plan dedicates around 2.22 billion euro to the promotion and sharing of knowledge, innovation and digitalisation.

Lastly, the issue of denominations remains on the table, on which a country like Italy has to deal with the reality of other Member States asking to register products whose names refer to our excellences (the example of Croatian Prosek is worth mentioning). How does the EU intend to protect the value of these products?

Italy has a great culinary heritage. It is very telling that Italy has the greatest number of registered quality products in the EU: more than 880 food and drinks products have a quality label, like Protected Designation of Origin (PDO), and Protected Geographical Indication (PGI). PDOs and PGIs benefit from a high level of protection in the EU, including against evocation and misuse. This protection system carefully scrutinises each individual request for the protection of a name and specifically takes into account the rights of all interested parties. The rules ensure fairness and equity among all parties and aim at avoiding labelling that misleads consumers. In particular, Prosecco did - and continues to - hugely benefit from the EU protection system.

What can be done to make this system even more efficient?

The Commission is planning concrete measures to further enhance the protection of geographical indications in the future. In particular, we presented a review of the current rules last year and our proposal is currently being discussed by the co-legislators, the European Parliament and the Council. Our proposal will increase the protection of geographical indications on the internet, for example as regards sales via online platforms and use of registered terms in the domain name system. We also would like EU countries to recognise GI producers' group. These groups will be empowered to manage, enforce and develop their GIs, notably by having access to anti-counterfeiting authorities and customs in all countries in the EU. This review will also introduce stricter rules on the use of GI names in the sale names of processed goods when the GI product is an ingredient of the processed product. I would like to recall that while the Commission is responsible for the registration of names, it is the countries that are in charge of controls and compliance. It is important to maintain a trustworthy legal framework to protect the global reputation of EU agri-food products. This will benefit rural economies across the Union and contribute to preserving local traditions and natural resources.

Andrea Dusio



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**Filo diretto con Janus
Wojciechowski**

Meat Sounding, transizione ecologica, tutela delle denominazioni d'origine, Politica agricola comune. In apertura del semestre che porta alle Elezioni europee, il commissario europeo per l'Agricoltura risponde alle questioni più calde del mondo food.

MartinoRossi: a controlled supply chain looking ahead

Thanks to the Agrifuture project agriculture is ever more sustainable. And the blends 'Meat analogue mixes' are designed to satisfy the higher demand of protein. The values of a multi-faceted company. Where everything starts in the fields.

Giorgio Rossi's attention is constantly paid to the fields. It's where the strength of his company lies. His eyes (and his heart) are there. It all becomes clear by looking at how he observes the fields outside the window from his office, as he recalls the story of his company, the market situation, past and future projects. Giorgio is the president, direct descendant of Martino, founder of the business. Today Giorgio is supported by his son Stefano, the CEO.

"A real supply chain starts from the field. Only this way it is possible to talk about sustainability, and thus discuss the future of the agriculture and the environment", says Giorgio. "We were born in the 1950s, putting the earth's products at the center of our interests and offering support to local farms, seeking increasingly effective solutions.

From this mindset, we have created the first controlled supply chain in the mid-1990s, which since then we have been fully managing in house at MartinoRossi to have the complete control over every phase and to offer our clients high quality raw materials at all times, we decided to eliminate all the raw materials containing gluten, soy, allergens, and GMOs, and we have bet on pulse and functional ingredients, developing innovative solutions."

The value chain

The cornerstone of the modus operandi of the company is the value chain: it all starts with the market analysis and the supply chain planning (resulting from over 30 years of collaboration with the partner companies): MartinoRossi carefully selects the farms to which

entrust the cultivation, to be carried out according to the disciplinary; it selects the best seeds destined to the farmers; and each phase is closely followed by an in-house agronomists' team. Threshing and transport are dealt with directly to avoid any risk of contamination; all the incoming and outgoing raw materials are subjected to strict chemical-physical analyzes carried out entirely in the internal laboratory, for the control of granulometry, humidity, mycotoxins and allergens. After that the drying, cleaning and storage phases take place. And at the end of all these steps, the team processes the raw materials.

Innovation

MartinoRossi is well aware of the fact that innovation is the key element allowing companies to have better

success possibilities. "We are always seeking increasingly effective solutions without the fear of change, with the knowledge that the key to success is the ability to make innovation, always without denaturalize the product", highlights Giorgio. His objective, indeed, it to become the reference supplier in the industry. Yet what makes his work so special is the commitment to become the driver of change towards an agriculture – and a food system – that is more sustainable.

Sustainability

MartinoRossi exudes sustainability. It can be seen everywhere, it's tangible. Everyone in the company feel responsible towards the environment. "The environment is our biggest resource and we want to take care of it. In order to reduce

the footprint of our production, we are adopting concrete solutions", says Stefano. "There are many examples: from experimenting with sub-irrigation, a method that allows to save up to 60% of water and up to 25% of phytosanitary; including the fight against parasites through the use of drones, introducing antagonistic species to fight and without the use of chemicals harmful to air, water and soil; to the project 'MartinoRossi for the Planet': the objective is to offset the CO2 emissions made by vehicles leaving MartinoRossi during their products delivery activity, planting over 10,000 plants per year."

The Agrifuture project

MartinoRossi's sustainability commitment is ongoing, as recently demonstrated by the Agrifuture project.

The experimental farming company dedicated to the research and study of new cultivation techniques and innovative solutions aiming at promoting a sustainable and high-quality agriculture. Founded by Giorgio Rossi, with the collaboration of the agronomist Gilberto Garuti, Director in New Technologies Development. Agrifuture cover an area of 330,000 sqm of fields nearby the headquarters of the company. It relies on the patented system 'Underdrip', a sub-irrigation precision technique, together with a minimum tillage philosophy, relying on the GPS technology, which enables MartinoRossi to sharply reduce the use of water, fertilizers, energy, and phytosanitary. "It is like a big open-air laboratory, where we can directly test the results of our research, thus optimizing the time between theory

and practice", explains Giorgio. "At the same time we wanted the outcome to be monitored and validated by authoritative and super partes subjects. This led to the collaboration with ERSAP (the regional body for services to agriculture and forestry), Università Cattolica del Sacro Cuore and Università degli Studi di Milano".

MartinoRossi: vera filiera controllata che guarda al futuro

Grazie al progetto Agrifuture l'agricoltura è sempre più sostenibile. E con le farine 'Meat analogue mix', soddisfare l'aumento della richiesta di proteine diventa realtà. Le sfaccettature di un'azienda poliedrica. Che ha un punto di partenza imprescindibile: la terra.

MARTINOROSSI IN NUMBERS

2

Production sites

10

Fully-automated processing and packaging lines

15,000

Worked hectares

500

Partner companies in Italy

600

Food industries served all over the world

THE PRODUCTS

The commitment towards innovation and sustainability is also mirrored in MartinoRossi's product range. The company provides flours, semi-finished products and functional ingredients from cereals and pulses, gluten-free, allergens-free and GMO-free, both conventional and organic. The clean label functional ingredients enabled the company to stand out on the market, "it's our answer to the new needs of the food industry: a range of versatile solutions to preserve the nutritional values of the raw materials."

But that's not all. Among the new entries designed by MartinoRossi, there are Meat Analogue Mixes, which represent a 100% plant-based alternative to meat. "These dry mixes for burgers, veggie balls, and Bolognese style sauce, are easy to prepare, since they only require a short time to rehydrate the product

with water and oil and then they are ready to be cooked. They have a 24-month guaranteed shelf-life, with no need to be stored at low temperatures. And they boast a short ingredient list: only four ingredients, two of them being pulse flours."

"Meat Analogue Mixes are also available unflavored, allowing a maximum flavoring customization of the recipes", adds Manuel Sirgiovanni, general manager of MartinoRossi. "The innovative mixes, gluten-free, soy-free, and GMO-free are available both in larger formats for the food industry, as well as in smaller formats – 300 and 250 grams – designed to meet the needs of the consumers and the Horeca sector. We are present on the market with two brands: MartinoRossi Professional for the Horeca industry, and Beamy for the retail sector."



MartinoRossi headquarter in Malagnino (Cremona)



Stefano and Giorgio Rossi with the Beamy range

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THE INVESTIGATION

ULTRA-PROCESSED FOODS

under the lens of science

This group includes foods such as snacks, ready meals, and soft drinks. Recent studies have focused on the possible link between such products and the development of cancer. What can consumers, politicians and companies do to reduce the risks?

Every now and then, a headline pops up questioning how carcinogenic a certain food is. For example, this has already been discussed about red meat and alcohol. And now it is time for the so-called "ultra-processed foods": snacks, ready meals, soft drinks... It is a long list of foods that we consume on a daily basis, characterised by long industrial processing. Recent scientific studies have focused on this type of products, highlighting a possible correlation between the consumption of ultra-processed food (UPF) and an increased risk of developing neoplasms.

The International Agency for Research on Cancer (IARC) in Lyon, a WHO agency evaluating and classifying evidence on the

carcinogenicity of substances, has not given its opinion on ultra-processed foods yet: after all, scientific data is still limited. This is why it is so important to immediately emphasise that it would not be correct to come down on such foods: more research and investigations are still needed. This group of products is also undoubtedly very broad, making any easy generalisation inappropriate. However, the research that has been carried out is worth analysing.

I cibi ultra-processati sotto la lente della scienza

Il segmento comprende alimenti come snack, merendine, piatti pronti, bibite. Studi recenti si sono concentrati sul possibile legame tra questi prodotti e lo sviluppo del cancro. Che cosa possono fare consumatori, politica e aziende per ridurre i rischi?

Ultra-processed foods: what are they?

First things first: what is ultra-processed food? The definition dates back to 2009, and it was introduced by Brazilian professor Carlos A. Monteiro in his article "Nutrition and Health. The issue is not food, nor nutrients, so much as processing". He argues that what determines the healthiness of a diet is how much the food has been processed, rather than the composition of food or its nutrients. This is why

he created the NOVA classification system, which is based on the distinction between unprocessed or minimally processed foods, processed culinary ingredients, processed foods and ultra-processed foods. The latter, in particular, can be defined as "formulations of ingredients that have undergone several levels of industrial processing, and which often contain several different dietary additives such as emulsifiers, sweeteners and colourants" – the definition is taken from another study: "Ultra-processed food consumption and cancer risk: A systematic review and meta-analysis", carried out by Irja Minde Isaksen and Simon Nitter Dankel and published in March 2023 in the international journal Clinical Nutrition. (...)

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(...) The industrial processing of these foods often includes hydrogenation, hydrolysis, extrusion, and more, and the addition of colourants, flavourings, emulsifiers and other additives is not uncommon. In short, this group is made up of foods that have gone through a variety of physical, biological or chemical processes. Hence, ultra-processed foods constitute a very heterogeneous category, which is difficult to assess precisely and exhaustively.

The correlation with cancer

This article references three studies. The one conducted by Isaksen and Dankel has already been mentioned. The other two are: "Ultra-processed food consumption, cancer risk and cancer mortality: a large-scale prospective analysis within the UK Biobank", by Kiara Chang et al., published in January 2023; and "Consumption of ultra-processed food and cancer risk: results from NutriNet-Santé prospective cohort", by Thibault Fiolet et al., January 2018.

According to all three of these studies, there is a correlation between the consumption of ultra-processed foods and an increased likelihood to develop some type of cancer. Each study focuses on different pathologies. However, one thing must be noted: in all cases, it is not possible to speak of causality, but rather of correlation. That is to say, it is still to be proven that the consumption of ultra-processed foods causes the growth of neoplasms.

Specifically, the study carried out by Fiolet et al. concludes that, in their results, "a 10% increase in the proportion of ultra-processed foods in the diet was associated with a significant increase of greater than 10% in risks of overall and breast cancer". According to the study conducted by Chang et al., "every 10 percentage points increment in UPF consumption was associated with an increased incidence of overall and specifically ovarian cancer". The meta-analysis performed by Isaksen and Dankel – which reviewed 11 studies on the subject – concludes that "the available suggestive evidence shows a consistent significant association between intake of UPF and the risk of overall and several cancers, including colorectal-, breast- and pancreatic cancer".

Hypotheses on the causes

The study conducted by Fiolet et al. suggests four possible causes, which were also considered in the research by Chang et al. The first is related to the generally poorer nutritional quality of diets rich in ultra-processed foods: these products are richer in energy, sodium, fat and sugar (and, in some cases, salt), but poorer in fibres and other micro-nutrients. These factors may also contribute to developing obesity, which in turn can cause certain types of neoplasms. It is worth noting that the mentioned studies adjusted their calculations by taking

into account factors such as body mass index, physical activity, smoking status, alcohol and energy intake, age, sex, education level and family history of the individuals examined.

The second hypothesis focuses on the wide range of additives contained in ultra-processed foods. Although they can be present in food products within certain levels, the consequences of cumulative intake across all ingested foods remain unknown. Third hypothesis: food processing and in particular heat treatments produce neoformed contaminants in products such as crisps, biscuits, bread, or coffee. Lastly, there is the possibility that there is a migration of bisphenol A from plastic packaging to the products. The study by Chang et al. points out that higher levels of phthalates and bisphenols were detected in the urine of individuals consuming large quantities of UPF.

What to do?

Researchers' attention has been drawn to the increasing consumption of ultra-processed foods in developed countries. The Western diet, specifically, includes higher levels of ultra-processed foods. Analysing the correlation between UPFs and cancer is particularly interesting, especially considering that one of the main ways to reduce the risk of neoplasms is to have a balanced and diverse diet. "About a third of the most common neoplasms could be avoided by changing lifestyle and dietary habits," reports the study by Fiolet et al.

It is worth pointing out that there is no certainty as to how the consumption of ultra-processed foods leads to an increased likelihood of developing cancer. However, the data collected allowed the scientists who worked on this research to state that the correlation between UPF intake and cancer risk is "clinically relevant".

end



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SCENARIO

Mad for Upcycling

The chips made with salmon skins, the protein snacks obtained from avocado seeds, the artichoke flour for baking gluten free dough. Giving value to waste is the hottest (and most sustainable) food trend of our times. In a decade, the market will be worth more than 80 billion dollars.



To create something new starting from what has been so far considered a waste. This is the meaning of 'upcycling', not to be confused with 'recycling', where waste material is collected to enter a new production cycle. The difference is indeed very subtle: to recycle something in order to create something new, this something needs to be broken down first. Upcycling, on the contrary, involves saving a by-product or a wasted product that would be sent to landfill otherwise, and give it a purpose. Beyond these terminological notes, upcycling is undoubtedly one of the hottest trends of our times, and in the food industry plenty of new, interesting 'upcycled products'

Tutti matti per l'upcycling

Le patatine fatte con la pelle del pesce, le barrette proteiche realizzate a partire dal nocciolo dell'avocado, la farina di carciofo per dolci e panificati gluten free. Dare valore agli scarti è il trend più forte (e sostenibile) dell'industria alimentare. Un mercato che, nel giro di 10 anni, varrà circa 80 miliardi di dollari.

UPCYCLING STORIES



Harmless Harvest
Known for its iconic coconut water, the company has expanded its portfolio to include products made with coconut meat from the very same coconuts, like dairy-free yogurt alternatives. The goal is to reach zero coconut waste to landfill.

Goodfish
Goodfish is a venture by Justin Guilbert and Douglas Riboud, founders of Harmless Harvest – a pioneer in coconut water and dairy alternatives. Now, it is revolutionizing the snacking industry too with the launch of the first 100% traceable Wild Alaska Sockeye crispy salmon skins, made with highly nutritious salmon skins. It is packed with good fats (omega 3), clean protein (full BCAA), marine collagen, and zero-carbs.



Rind Snacks
The secret ingredient in the company's peel-powered whole fruit snacks is not something it adds, but what it doesn't subtract: the rind, the heart of a fruit's nutritional power. Since inception, Rind has helped eliminate over 1 million pounds of unnecessary food waste.

Arla Foods
Arla Foods Ingredients has partnered with public and private sectors in Denmark and Ethiopia to transform papaya waste into nutritious snack, with the goal of reducing malnutrition and creating new jobs: in Ethiopia, papayas are a source of income for 890,000 farmers. It's a dried fruit protein bar based on papaya pulp and containing milk and whey-based ingredients.



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SCENARIO

are flourishing. Products that manage to satisfy two important consumer needs: the search for sustainability and their continuous crave for innovation.

Could it be the answer to the food waste problem?

1.3 billion tons of food, worth approximately 1 trillion US dollars and representing a third of all food produced globally, are wasted every year. In 2021, the US Environmental Protection Agency published a report on the environmental impacts of food waste where it estimates that each year, only in the US, food loss and waste embodies 170 million metric tons of carbon dioxide (CO2) emissions, equal to the annual CO2 emissions of 42 coal-fired power plants. This estimate does not include the significant methane emissions from food waste rotting in landfills: as food roots and degrades, it emits methane, a gas considered to be much more harmful than CO2. Estimates suggest that around 10% of global greenhouse gas emissions are associated with food that is not consumed.

A huge burden on the environment, and a hidden cost that undermines business profitability. That's the reason why more and more companies are looking at upcycling, using surplus food or food by-products to produce new and intriguing products like dietary supplements, beauty products, nutraceuticals, animal feed and, of course, delicious snacks for human consumption.

New challenges and opportunities

In recent years, upcycling has emerged as one of the hottest trends in food and beverage. Today, the upcycled food market is worth nearly 50 billion dollars with an expected Cagr of about 5% over the next 10 years. The category is indeed projected to exceed 80 billion dollars by 2032. According to Innova Market Insights, between 2016 and 2021 launches of food and beverage items with upcycled ingredients saw a compound annual growth rate of 122%.

"Modern, industrial production systems within the food industry are already ensuring that waste is minimized [...] and work is continuously being undertaken to ensure that resources are used efficiently", a recent article published in the the Anuga FoodTec magazine explains. "To further reduce resource consumption, manufacturers employ what is called the cascading or multiple use of a raw material over several stages. This is carried out by using secondary products or residual materials to produce animal feeds or by means of energy conversion in biogas plants."

UPCYCLING STORIES

EverGrain

It's the sustainable ingredient company created by the beer's giant AB InBev to turn Brewer's spent grain (Bsg) – a beer production byproduct – into ingredients that can be used in a variety of food and beverage applications, like the EverPro barley protein, officially presented in June 2022. Thanks to a 100 mln investment and a new 130,000 square foot facility in St Louis (Missouri), the company is planning to entered large scale production.



Flock Foods

Flock Chicken Crisps, named the #1 snack by Men's Health in 2020, are made from chicken skin. Low in carbs and packed with protein, these crisps deliver a delicious crunch and are a healthy on-the-go snack.



Riff

In 2019, this sustainably-driven coffee company began experimenting with cascara, the nutrient-rich and tasty byproduct of the coffee harvest. The result was a clean-label energy drink brewed from upcycled cascara: Riff Energy+.

Barvocado

In 2020 the New York-based startup Avocado Riot launched Barvocado, upcycled energy bars made with avocado fruit and seed and produced in three flavors: Matcha Moringa, Coconut Maca and Cacao Sunflower. The importance of upcycling in the avocado industry is for all to see, especially in the US: in 1985, Americans ate 436 million pounds of avocados per year. By 2020, that number reached 2.7 billion.

Keishindo Yuji Mitsuda

The Japanese company Keishindo Yuji Mitsuda, established in 1866 and famous for its shrimp crackers made from shrimp surimi (paste), launched in 2021 the Sustainable Shrimp Crackers, made from shrimp heads and off-cuts of noodles, with the addition of curry powder. It took almost two years of research and development.



Hope and Sesame Sesamemilk

With 8 g of complete protein per serving and a good source of calcium and vitamin D, Hope and Sesame Sesamemilk was specially formulated to be nutritionally comparable to dairy milk. And yet, it is made from the ultra-nutritious protein remaining after sesame seeds are pressed for oil production.

Circular-Fiber

It is called Karshof the functional flour made by the Italian startup Circular-Fiber starting from artichoke waste. Ideal for baking bread, pasta, pizza, sweets and savory snacks, Karshof flour is rich in fiber (about 60%), vegetable proteins (about 13%) and antioxidants such as Inulin (at least 6%). It is also gluten free.

Seeweedery

The Australian Seeweedery is making cooking oil from prawn shells and seaweed-based vinegar. The company produces its Prawn Oil in collaboration with Austral Fisheries, which uses the Skull Island Prawn shells that otherwise would go to waste.



Hello! I'm Ugly

The Ugly Company, which upcycles 'imperfect' fruit into dried fruit snacks, upcycled more than 2.1 million pounds of fresh 'ugly' fruit in 2022, prevented them from becoming food waste. Previously this year, it received 9 million dollars in funding to expand its processing capacity.



imPasta! Inc.

The inspiration for Already Spaghetti is to find a solution to the millions of pounds of wasted spaghetti squash as a result of cosmetic scarring. The company developed a way to use upcycled spaghetti squash to deliver a ready-to-eat product intended as a low-carb alternative for pasta, rice, and potatoes.

In Italy, a benchmark company in this field is definitely Caviro Extra, subsidiary of the country's largest wine cooperative Caviro. From the wine-making industry, Caviro Extra receives more than 660,000 tons of production waste every year, ready to be transformed into ingredients and products of high added value. Extra is one of the main national producers of rectified musts and grape sugar, and one of the major world players in the tartaric acid sector, a natural organic acid contained in wine lees that can be used in many different industrial sectors. It also obtained sustainability certification to market first-generation bioethanol (of agricultural origin from cereals) and advanced second-generation bioethanol, obtained from by-products of the wine production chain.

The US on the frontline

In the United States, the Upcycled Food Association (UFA) is a network of more than 250 businesses from

around the world, collaborating to empower consumers to prevent food waste with the products they buy. UFA recently launched the Upcycled Certified program, the world's first third-party certification program for upcycled food ingredients and products. The flagship of the Program is the on-package mark, which helps retailers feature upcycled products on shelf, and indicates to consumers which products are 'Upcycled Certified'. In 2022, the UFA recently revealed, membership grew 38% and the number of Upcycled Certified products and ingredients has doubled.

Upcycled Foods Inc.: industry pioneer

The United States are home also to one of the food upcycling pioneers: Upcycled Foods Inc.. Founded a decade ago as ReGrained, it recently rebranded to expand its footprint in the ingredients market. The ReGrained flagship brand uses a thermo-mechanical process to process

spent brewers' grain into a flour. "It all started in college we learned how to make our own beer. Every 6-pack we brewed left us with 1 pound of grain", the company explains on its website. "We were hauling this grain out to the dumpster until we started baking bread with the flavorful and nutritious material. At first, our goal was to make enough money to brew beer for free. We soon realized the possibilities were much bigger."

The company started to harvest the ingredient from breweries and created ReGrained SuperGrain+, an upcycled food ingredient loaded with fiber, protein and functional benefits. With it, a range of baking mixes for making pizzas and sweet doughs was created, and Upcycled Foods Inc. is now rapidly expanding its offering and network.

In partnership with Kerry, it launched an innovative ingredient designed to be formulated into products to add texture and nutrition: the Upcycled Protein Crisp. This ingredient - the first to be announced in

a larger partnership with Kerry to develop value-added ingredients -, saves over 300 gallons of water per pound of flour, and prevents the carbon dioxide equivalent of burning one pound of coal, according to the company.

Together with Kroger, instead, it co-developed the first two upcycled bread items containing 10% of ReGrained SuperGrain+ for the retailer's Simple Truth store brand. Upcycled Foods Inc. has expanded its portfolio also beyond grains into complementary ingredients, including an Arabica Coffee Leaf (dried) ingredient made by using tea processing methods on the leaves of the arabica coffee plant through a vertically integrated partnership with Finca La Aurora in Nicaragua; and a Cacao Fruit Syrup produced from the pulp of the cacao fruit from Ecuador that is discarded after its seeds are extracted to make chocolate, and suitable for a wide range of applications, including sour ales, sauces and marinades.

end

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THE COMPANY

www.salumibenvenuti.com

Salumi Benvenuti: innovating tradition

Founded in 1958, the company based in Lucca (Tuscany) produces various types of salami, lard, guanciale and pancetta – combining artisan production, state-of-the-art technology and the utmost attention to quality.

Salumi Benvenuti was founded in 1958 thanks to the passion of its founding partners, Rocco and Enzo. In the beautiful setting of the city of Lucca (Tuscany), they owned a grocery shop in Mercato del Carmine in the city centre, where they began to sell the cured meats created in their artisan butchery, located on the outskirts of the city. Thanks to the success of their new business, they decided to expand it, so they hired their first employees and set up the production line with the first machinery. They increased their production and the manufacturing processes became even more accurate. Thus began the actual production of the excellent Benvenuti cured meats, known for their high quality.

In 1995, the construction of a new plant was completed, adjacent to the original production site and designed according to European health regulations. Subsequently, in 2007, the factory was further expanded to double the production capacity.

The challenges of the second generation

Today, Salumi Benvenuti is run by the five children of the founders, who have

succeeded in bringing the company into the new millennium, demonstrating that it is still possible, in the national cured meat industry, to maintain the artisan tradition inherited from a father, enhancing the values that impose production ethics focused on the high quality of the product, respecting the end consumer. The challenge that the Benvenuti family has decided to accept, in such difficult times for the cured meats sector, is to continue to invest in the innovation of the production chain, in order to guarantee the quality of its products and continue to improve them. To do so, the owners decided to proceed with the energy evolution of the production processes, through the installation of photovoltaic systems on the roof and on the ground, which will allow the company to cover 70% of its energy requirements independently.

Safety and high quality

Salumi Benvenuti also pays great attention to consumer safety, guaranteed by the voluntary certifications of the BRC (British Retail Consortium) and the IFS (International Food Standard). The primary goal is in compliance with the regulations



The Benvenuti Family

Salumi Benvenuti: una tradizione che si rinnova

Fondata nel 1958, l'azienda di Lucca realizza diverse tipologie di salame, lardo, guanciale e pancetta. Tra produzione artigianale, tecnologie all'avanguardia e massima attenzione alla qualità.

THE PRODUCTS

LARD

Salting lard was originally, like all kinds of salting, a method of preserving meat in the absence of refrigeration techniques. In Tuscany, it was turned into an art, and lard is salted in conca or bigongi, a refined delicacy that everyone envies us.

The "mastro lardaiuolo" is the brand that distinguishes the dedicated method, with a slow curing process that lasts a minimum of four months. There is a wide range of products: Selection Lard, Lard cured in conca, Lard with herbs, and Patanegra Lard.

GUANCIALE

The Benvenuti guanciale is the company's most developed product in the current year. It is produced using exclusively fresh cuts from domestic pork, respecting our old artisan recipe that requires, in addition to salting, the traditional curing times and techniques.

SALAMI

Our salamis are made from 100% Italian lean pork, processed according to old traditions – adding salt and spices – by our artisan "artists". The careful and slow curing process gives them an unmistakable fragrance and a taste that is particularly appreciated by the most demanding consumers, from Finocchiona PGI to Salame Gentile, to the typical Tuscan salami.

Special mention should be made of the sweet and spicy salamelle, which have succeeded in bringing young consumers closer to top-quality salami. Cut into thick slices, they are excellent for enriching appetisers with a sweet and tasty delicacy.

PANCETTA

The processing of national pancetta begins with the choice of the best raw materials, rigorously selecting pork of Italian origin and carefully assessing the lean-to-fat ratio. It is then time for a short and careful salting process, with a little salt, spices and herbs. Once salting is complete, pancetta is seasoned with herbs and spices, and it is ready for careful and lengthy curing.



in force and being absolutely certain they are offering their end consumers and partners a quality product, which is gluten-free, made with fresh national meat, without milk protein and its derivatives.

Respect for tradition

Sales, which are experiencing a significant increase in the current financial

year, are growing both in the national large-scale retail trade channel and in specialised retail. Markets in EU countries are also improving considerably. Extensive research into raw materials, control of the proximity chain and production processes, respect for artisan tradition and thoughtful, accurate and efficient customer service are the pillars on which the

company is founded today. In addition, the conformation of the territory – which takes advantage of the Versilia sea breeze and the fresh winds coming down from the Garfagnana area – makes it possible to provide customers with a wide selection of superior-quality products, appreciated by consumers, making Salumi Benvenuti a brand for real connoisseurs.



THE COMPANY

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www.fontemargherita.com

From the 'Piccole Dolomiti' to the world

Bottled directly at the source, since 1845 Fonte Margherita provides pure waters of premium quality. With a focus on sustainability and health, the company is committed to pursuing its 'non alcoholic mission' with a wide range of soft drinks and aperitifs made with natural aromas.

Three bottling plants, five different brands of mineral water from the Piccole Dolomiti mountain range – the Dolomites' 'little sisters' on the border between Veneto and Trentino –, and two lines dedicated to soft drinks and alcohol-free aperitifs. For a total of over 35 million bottles produced every year, and distributed in Italy and overseas, in the out-of-home channel, in retail, directly at consumers' doors, as well as in the vending sector.

The history of Fonte Margherita, headquartered in Torrellegna – in the Vicenza province – dates back to 1845 when the first spring was discovered. In 2017, the company reached a significant milestone: aiming at restoring the springs to former glory and thus relaunching the business, it was acquired by two young entrepreneurs: Denis Moro and Nicola Sartore. With a focus on sustainability, ongoing innovation, and consumers' well-being, Fonte Margherita's water is bottled directly at the source, with the ultimate goal of preserving the quality of the water of the Piccole Dolomiti. During our visit at Fonte Margherita, we retraced the origins of the company, focusing on the latest product launches and future plans with CEO Denis Moro.

Bottled directly at the source

Deep local roots balanced with innovation and sustainability through the use of cutting-edge technologies guide Fonte Margherita's daily activities. The group comprises three

businesses: Fonte Margherita since 1845, Fonte Regina Staro since 1902, and Sorgente Alba since 1971. "In 2018 we started reactivating the sites, reorganizing them in a single group, which today boasts a range of five totally different mineral waters (Fonte Margherita, Fonte Regina Staro, Acqua Azzurra, Fonte Lonera, and Sorgente Alba) and five production lines," says Denis Moro. In a strive to guarantee the organoleptic properties and enhance the taste of food, the waters from the Piccole Dolomiti are bottled directly at the source or at the spring, and distributed either in glass bottles or in recyclable cardboard bricks. "Glass has a natural bond with water as it preserves its taste and purity. Moreover, the bottles can be returned, thus contributing to protecting the environment from plastics," adds Moro. "Consumers nowadays are ever more on the hunt for eco-friendlier options and we are able to satisfy such a request with our returnable system."

An international success

Fonte Margherita's story began with the 'door to door' selling. In the last six years, though, "we enriched our range, and now we boast three different brands distributed in the Horeca channel and one, Acqua Azzurra, destined to the retail sector, both in Italy and abroad," explains Moro. As of today, exports account for approximately 30% of the overall turnover, with Fonte Margherita's products being distributed both



Denis Moro, CEO Fonte Margherita 1845



Fonte Margherita: dalle Piccole Dolomiti al mondo

Tre impianti di imbottigliamento, cinque marchi di storiche acque minerali delle Piccole Dolomiti, a cui si aggiungono due linee di bibite analcoliche. Le origini di Fonte Margherita risalgono al 1845. Con sede a Torrellegna, in provincia di Vicenza, l'azienda ha fatto della sostenibilità a 360 gradi e della promozione di uno stile di vita sano la sua mission. Le origini di Fonte Margherita, gli ultimi lanci di prodotto e i piani futuri in un'intervista al Ceo Denis Moro.

ta's products being distributed both in the Horeca and the retail sector. "In Europe, we are mostly present in Germany and Belgium. This year, moreover, we have been investing greatly in strengthening our market share in the United Arab Emirates. We are also currently installing a new end-of-line automatic technology in Fonte Margherita, which will enable us to meet the requests of the American market. In line with the sustainability goals, in Belgium and in Germany we decided to export our products by rail since it allows to reduce our carbon footprint by 90% compared to road transport."

The 'non alcoholic mission'

No alcohol? No problem! Seven soft drinks different flavors and three alcohol-free aperitifs complete the range. The company has indeed embarked on a 'non alcoholic mission' aiming at providing consumers with healthy yet at the same time fancy options that only contain fructose and natural flavors mixed together with the key ingredient: mineral wa-

ter from the Piccole Dolomiti. The soft drinks branded Fonte Margherita are distributed in the Horeca sector, whereas the Acqua Azzurra brand is to be found in retail. The drinks are available in the following flavors: Aranciata, Ginger, Cola, Chinotto, Gazzosa, Limonata, and Mandarino.

The alcohol-free aperitif options are the latest addition to Fonte Margherita's assortment. Spritz Zero, Gin Tonic Zero and Bellini Zero are thought for the out-of-home channel. Apart from entailing no alcohol, they are colorant-free drinks made from mineral water from the Piccole Dolomiti with only natural flavorings which are carefully selected by the R&D department aiming at creating the perfect recipe for drinks so that they are balanced and full of taste. Denis Moro explains: "These aperitifs are widely appreciated overseas and they perfectly match the growing 'No-Low alcohol' consumer trend. To this end, I still cannot unveil much, but next January we will launch two new non alcoholic aperitifs. So, stay tuned!"

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GUANCIALE WITH CHILI	FIOCCO WITH GREASE	NATIONAL SCAMBATO WITH PINK PEPPER	FIOR DI FESCA WITH BLACK PEPPER	LONGARDO WITH PINK PEPPER	GOURMET GUANCIALE
FIOR DI FESCA WITH PINK PEPPER	LONGARDO WITH GREASE	CULATTA WITH GREASE	PANCETTA DELLY WITH BLACK PEPPER	SCAMBATO WITH CHILI	NATIONAL PROSCIUTTO WITH GREASE WITH BONE



THE COMPANY

www.sano-salumi.com

Artisans of Guanciale Amatriciano (and more)

Salumificio Sano produces numerous local specialities following traditional recipes. The expansion of different distribution channels. The potential for growth in Italy and abroad. Chiara Castelli, owner of the company based in Accumoli (Rieti), tells us all about it.

Accumoli, province of Rieti (Lazio). It is here, in this small village located over 800 metres above sea level, that Salumificio Sano is based, a gem of craftsmanship and "savoir-faire" which is famous for its specialities – first and foremost Guanciale Amatriciano and Prosciutto Amatriciano PGI. We talk about territory, tradition and typicality with Chiara Castelli, owner of the company. And we also talk about how guanciale, which used to be a product of humble beginnings, has become an unstoppable trend.

When was the company founded?

Salumificio Sano was founded by my father Gianfranco in 1986. In that year, he took over a small pork butchery and, at a time very different from today, when we didn't talk of a link between territory and products, he focused on quality craftsmanship. An additional step followed in 1992, with the opening of the ham factory. We have been called the "modern creators of ancient flavours". You just need to take a look at our products to understand the reasons for this definition: Guanciale Amatriciano, Prosciutto Amatriciano PGI and seven other PAT products (traditional food products).

These specialities have become increasingly popular in recent years...

Exactly. Over time, we have become the main producer of Guanciale Amatriciano and Prosciutto Amatriciano PGI. Both have been awarded 5 pins by Guida Salumi d'Italia (Guide to Italian cured meats, ed.), which recognised them as Italian outstanding products, and our Guanciale Amatriciano has been defined as the best in Italy.

What are its characteristics?

The distinctiveness of Guanciale Amatriciano lies in its simplicity, as it comes from the peasant tradition. It is said that farmers, during the transhumance, used to bring with them guanciale, flour and a pan to eat pasta, initially 'alla gricia' and then 'all'amatriciana'. Anatomically, it is the well-trimmed, triangular-shaped jowl of an Italian pig. Our guanciale is covered in spices, pepper and then it seasons for 90 days.

What formats and sizes are available?

The final weight is 1.2-1.5 kg and there are different formats: whole, half vacuum-packed, and sliced vacuum-packed. For the hospitality industry, we also produce large trays on request. It is precisely the hospitality industry that is perhaps rediscovering guanciale

more than any other: it is a very important product for the "sacred" dishes of traditional Roman cuisine; on the other hand, other uses are also becoming popular, such as thin slices on bruschettas or in combination with meat and fish.

Is the trend steadily growing?

Yes, I must say that the trend is expanding more and more each year. And it is even more interesting if we consider that it is a "poor" product, which was almost forgotten until the 2016 earthquake, which has somehow drawn attention to the Amatrice territory and its specialities. Over the years, sales have grown exponentially, moving away from the logic of solidarity triggered by the tragic event that struck us. In the meantime, the continuous discussions on the origin of the dishes and the "real recipes" have aroused interest, and in this regard, there has also been the TSG certification for pasta all'amatriciana, which calls for Guanciale Amatriciano as the main ingredient.

Not bad for a "poor" product...

As we mentioned, its origin is poor and peasant, even though it is now almost a "luxury" cut, given the exponential growth of raw material prices – a fact that we as producers struggle with on a daily basis.

How much does export account for?

Not much, so far, about 3%, but we intend to increase this amount, because we are certain that our local products have great potential. Most of our existing customers are in Italy, but we also supply restaurant chains abroad: Thailand, Hong Kong and Switzerland are the most interesting markets. In general, as I mentioned, out-of-home is definitely the most dynamic channel, also because we have noticed a great rediscovery of Roman cuisine, both in Italy and abroad. But it is also worth remembering that it is a speciality of Central Italy, and it is precisely in our territory that the authentic guanciale can be found.

Territory: a recurring word that is also present in all your products.

Territory and tradition are two key concepts for Salumificio Sano. Another flagship product is Prosciutto Amatriciano PGI –

the only ham officially recognised by the Lazio region – which obtained the geographical indication in 2011: its characteristics are the use of Italian heavyweight pig, a high rind opening and a medium-sweet taste, not savoury at all. The end result is quite different from what is often thought of Central-Italy hams. And this product, like Guanciale Amatriciano, has also been awarded 5 pins by Guida Salumi d'Italia. Several starred chefs use it in their kitchens, and we have noticed a growing interest from all channels, including large-scale retail.

Why is this happening?

I believe that enhancing the specificities of the territory is essential, and it is good that these products are known and appreciated outside their production area. We are also the only producers of Prosciutto Amatriciano PGI. This makes our mission difficult, but very interesting at the same time.

How are you facing this challenge?

We have to come to terms with the fact that there is no Protection Consortium to support us, so it is certainly a complicated challenge. On the other hand, being the only producers pushes us never to lower the bar of quality: we are the guarantors of craftsmanship that is unique to our territory. A marvellous territory that also presents some difficulties: in the charcuterie sector, it is not as well-known as more renowned areas, and there are also logistical issues. In conclusion, there is still a lot of work to be done and we will do our part. We have ambitious plans for growth, both commercially and in terms of expanding our production site.

Artigiani del Guanciale Amatriciano (e non solo)

Il Salumificio Sano produce numerose specialità del territorio seguendo ricette tradizionali. Il boom dei diversi canali distributivi e in particolare dell'Horeca. Le potenzialità di crescita in Italia e all'estero. Parla Chiara Castelli, titolare dell'azienda di Accumoli (Rieti).



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THE CONSORTIUM

Parma Ham: when tradition meets modernity

Prosciutto di Parma scores two important results in a year full of challenges: the celebration of the 60th anniversary since the foundation of the Consortium and the introduction of the new Production Specifications.

2023, in the wake of the previous one, is a year full of challenges for Prosciutto di Parma. The reference context has many aspects in common with the one that had clearly loomed large in 2022: shortages and record costs for raw materials continue to weigh heavily on the production capacity of companies, which also have to deal with the pressure of financial burdens. On top of this there is the threat posed by African Swine Fever, which is creating a situation of great alarm. Turning to sales figures, it is the inflationary dynamics that are penalizing, as they shift consumer preferences, which see their purchasing power decisively reduced, towards generic products with a lower cost.

The Consortium turns 60

In such a complex framework, the results communicated by the Parma Ham Consortium in 2023 are even more significant. The first dates back to April, when the body for the protection of Prosciutto di Parma PDO officially celebrated the 60th anniversary of its foundation: "On 18 April 1963, 23 producers of Prosciutto di Parma had their greatest intuition: they realized that, by joining forces, they would be able to protect and enhance this absolute excellence that they had in common," comments Alessandro Utini, president of the Consortium. "60 years later, the commitment made by the founders is extremely topical and still traces the path of the 134 companies that make up the Consortium today. The anniversary we are celebrating this year is not a milestone, but rather a stage in a journey that will soon involve the new generations. To them we have the responsibility of delivering a healthy sector and a product that is increasingly in line with the needs of the consumer, the environment and, in general, of a world that is constantly changing."

The new Production Specifications

And it is precisely to this last aspect of the president's words that the news recently released by the Consortium relates: after an amendment process that lasted over four years, as of last 4 September, the application of the provisions contained in the new Production Specifications became mandatory, with the entry into force of the new Control Plan.

The changes to the Production Specifications respond to the need, expressed by all the members in the production chain, to update the document to make it consistent with a context that has definitely changed since it was first drafted 30 years

ago. The objectives are clear and well-defined: to further strengthen the quality of the product, its distinctiveness from competitors and meet the needs of an increasingly attentive consumer, without ever neglecting the challenges of sustainability and ecological transition.

The changes contained in the new specifications concern all production aspects, from the characteristics of the raw material to the finished product. They start with genetics: the list of permitted genetic types has been reformulated and an explanatory table has been inserted concerning possible combinations of reproductive crosses, emphasizing the use of Italian heavy pigs. The

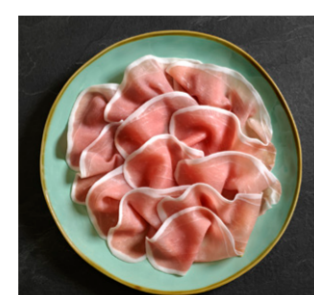


Alessandro Utini

changes also concerned the feeding of pigs on farms, which underwent a revision that focused on the territoriality of the raw materials used: some foodstuffs from abroad were replaced with those from the area, an even more significant aspect given the link between the PDO and its territory. It was also decided to extend the pig breeding area for the production of Parma Ham to the Friuli-Venezia Giulia Region.

Speaking of the product, a few important aspects also need to be pointed out. The minimum weight of the fresh leg has been raised from 10 to 11.8 kg while the maximum limit has been set at 18 kg. The minimum maturation period was increased from 12 to 14 months while the minimum weight of the product was raised from 7 to 8.2 kg and the maximum to 12.5 kg. There is also an extremely significant change in the salt content: the maximum permitted salt content drops from 6.2% to 6%, in line with the WHO's indications regarding the reduction of sodium in the daily diet. In conclusion, a note concerning pre-sliced ham: the positive results of scientific tests carried out on the shelf life of Parma Ham in trays allowed the Minimum Conservation Term (MCT) to be extended.

"In 2023 Parma Ham strengthens two elements that dialogue in synergy: its tradition and its modernity. Celebrating the 60th anniversary of our Consortium with the introduction of the new Production Specification is undoubtedly the best way to strengthen the necessary link that unites the past and the present, but above all to invest in a future in which the quality, transparency and sustainability of our product will increasingly be the hallmarks of its uniqueness", president Utini concludes.



Prosciutto di Parma: la tradizione sposa l'innovazione

Il 2023 per il Prosciutto di Parma rappresenta un anno ricco di sfide. Un anno in cui la specialità Dop ha messo a segno due importanti risultati: il 60esimo anniversario dalla fondazione del Consorzio e l'introduzione del nuovo disciplinare di produzione.

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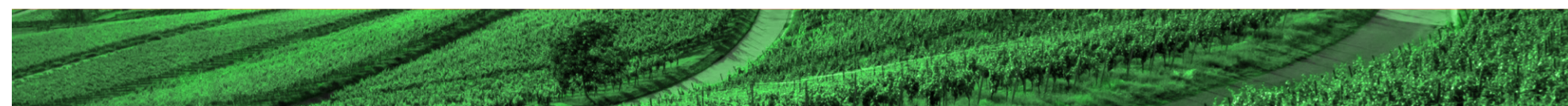
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Organic made in Italy exports: an expanding market

International sales of organic food and beverage produced in Italy are increasing, driven by an increasing demand from Europe and the US. Here are the results of the survey Nomisma carried out for ITA.BIO.



Consumer choices are increasingly guided and influenced by sustainability ideals and oriented towards products that can ensure a healthy diet, environmental protection and sustainable supply of raw materials. It is precisely for this reason that there has recently been an increase in the number of people choosing products made from organic raw materials. And this is a trend that is mainly developing outside the home. "The survey conducted by FIPE and ISMEA at the suggestion of AssoBio, which for the first time analysed this sector in Italy, showed that more than 50% of Italian bars and almost 70% of restaurants offered or used organic food, drinks and raw materials in their culinary preparations," Roberto Zanoni, president of AssoBio, explains.

Organic food is enjoying great success not only in Italy but also all over the globe. According to a survey Nomisma carried out for ITA.BIO – a platform for the internationalisation of organic made in Italy products sponsored by ICE Agency and FederBio –, organic food is particularly popular in the USA. In the last year, 89% of the American population has consumed an organic product at least once. It is also popular in Scandinavia (87%) and Canada (76%).

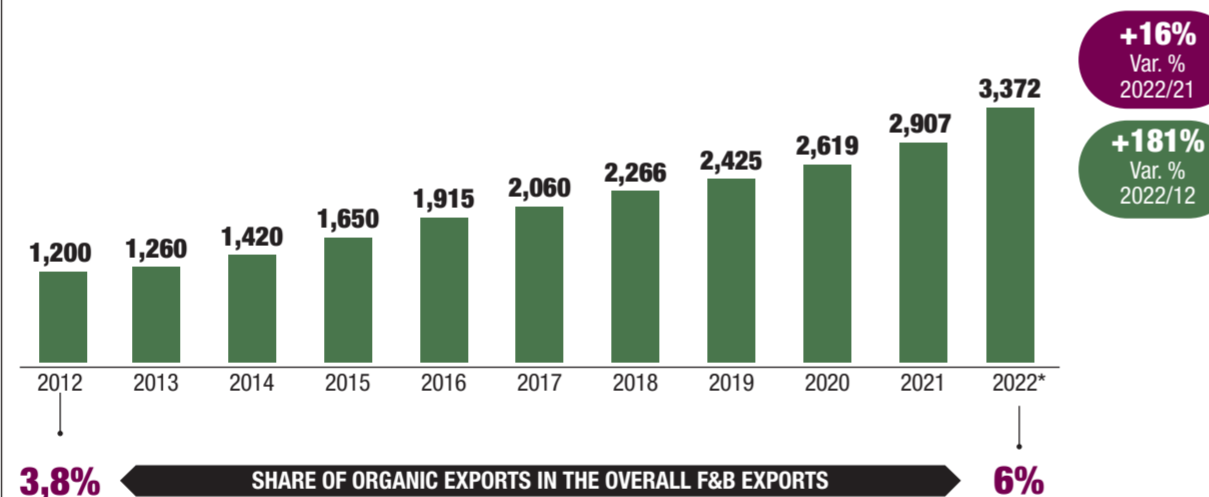
The protagonist of this success is organic made-in-Italy production, which has great growth opportunities and has attracted great interest both in Italy and abroad.

A growing sector

In 2022 (year ending in June), the sales of Italian organic food products on the international markets reached 3.4 billion euro, an increase of +16% compared to the previous year, when they amounted to 2.9 billion euro. Positive results for the sector were also recorded in the long term. Since 2012, when organic made in Italy exports equalled 1.2 billion euro, the sector has almost tripled, growing by 181% – starting from an incidence of organic exports on total food exports of 3.8% in 2012 and reaching 6% in 2022. This is the overview of the sector presented by the Nomisma survey, which summarised the latest analyses of the SANA Observatory.

Driving the export of organic made in Italy products is food, which accounts for 81% of total exports and which reached a value of 2.7 billion euro in 2022 – a growth of 16% compared to 2021, when the sector recorded a value of 2.3 billion euro. In the second place, we find wine, occupying the remaining 19%, with a value of 626 million

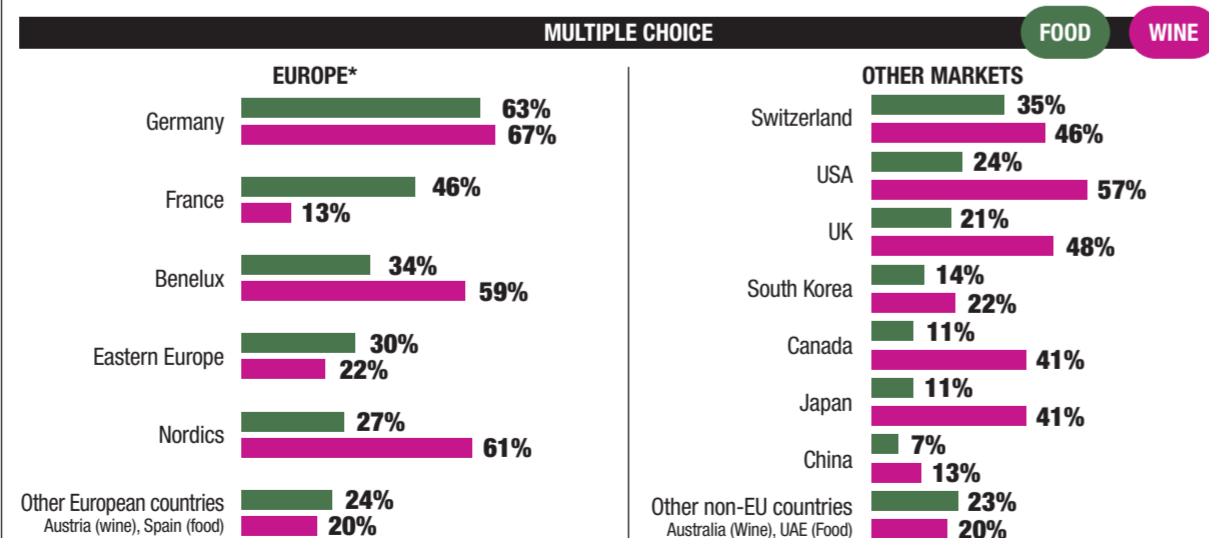
EXPORT BIO MADE IN ITALY (2021-2022, million € - year ending in June)



Source: Nomisma for ITA.BIO

DESTINATION MARKETS FOR THE BIO MADE IN ITALY

What were the main destination markets in 2021?



Source: Nomisma for ITA.BIO | *Including Norway

euro – a growth of 18% compared to 2021, when the sector was worth 533 million euro.

There are several reasons behind the success of Italian organic products abroad, first and foremost the high quality of the products (66%). But also important are the general interest in made-in-Italy products (60%), the equivalence of the EU organic logo (34%), the high average per capita expense on organic products (33%) and the guarantees associated with organic food products (24%). Problematic, on the other hand, for Italian companies that want to export organic products abroad, are the costs related to promotional activities on international markets (42%), local bureaucracies (37%), price competition from local companies (37%), the lack of a national system that promotes organic made in Italy products (32%) and the scarce opportunities to meet buyers and other operators in this sector (28%).

Germany and Benelux are among the favourite destinations

According to a survey conducted between July and August 2022 by Nomisma for ICE Agency and FederBio on a sample of 290 Italian food and wine companies, among the destination markets for organic made-in-Italy exports, the one that stood out in the European Union in 2021, as far as food is concerned, is Germany (63% of the total number of companies) – followed by France (46%) and Benelux (34%). Moving on to wine, the German market is still leading the sector (67%). Followed, in this case, by the Scandinavian countries (61%), and again by Benelux (59%). If we look outside the EU, for both food and wine, Switzerland (35% food - 46% wine), the United States (24% food - 57% wine) and the United Kingdom (21% food - 48% wine) perform well. Also worth mentioning, especially for wine, are Canada and Japan, both of which are worth 41%. Much attention is also paid to those markets with exciting growth prospects in the sector over the next three years. Among these, in the food sector, Germany (56%), the Scandinavian countries (32%) and the United States (25%) stand out. For the wine sector, the Scandinavian countries (58%), the United States and Canada are on the podium. This shows that the made-in-Italy organic export market involves many countries in the world and is experiencing a period of considerable growth.

The Being Organic in EU project

In addition to the Organic Action Plan, in order to support the growth trend of the organic sector, the Being Organic in EU project of the European Union has also been developed – it is a promotional campaign created to provide more detailed information on organic food, and it sees Italy and Germany as target countries for the project.

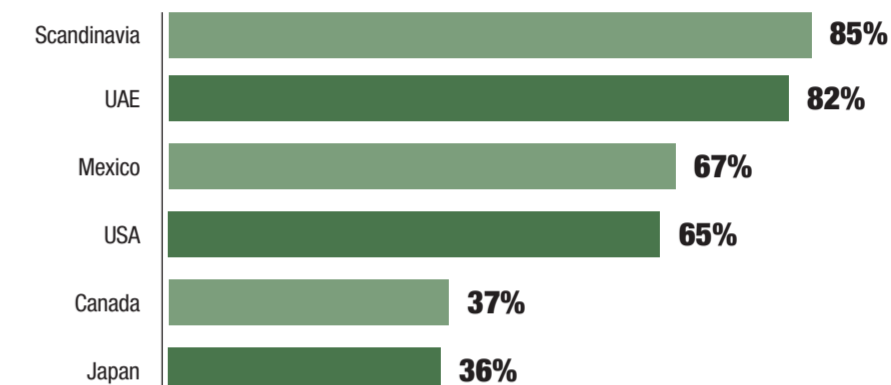
The initiative – which started in January 2022 and will end on 31st March 2025 – is a collaboration between FederBio and Naturland and is co-financed by the European Union. It has three major aims: to consolidate and improve public opinion on European organic farming, to increase appreciation for its methods and standards, and to make the EU organic logo well-known. Being Organic in EU also aims to highlight the specificities of organic production methods in Europe in terms of safety, traceability, authenticity, labelling, respect for the environment and sustainability.

Export bio made in Italy: un mercato in espansione

Aumentano le esportazioni di food&beverage biologico prodotto nel nostro Paese. Trainate dalla domanda di Europa e Usa, in primis, mercati dove vanta grandi opportunità di crescita. I risultati dell'ultima indagine Nomisma per Ita.Bio.

BIO MADE IN ITALY: THE OPPORTUNITIES

If, starting from next week, you were to find a new organic f&b product made in Italy, in the shops you normally visit, would you be interested in buying it? (% , positive)



Source: Nomisma for ITA.BIO

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How to get out of a crisis?

THE SAINSBURY'S CASE

The British retailer is evidence of how virtuous management of the core food business, price restraint, employee gratification, and fight against waste are the decisive factors in coming out of a difficult phase.



The end of the pandemic coincided with the beginning of an equally turbulent situation, characterised by new blows to international balances. As always, we will try to get out of it with resilience. Energy supply systems are gradually readjusting, interest rate rises are intended to quell the rise in the general price level by shrinking the money stock, and distribution is trying to mitigate the relentless storm of price increases on end consumers. Meanwhile, consumers are reacting by becoming alarmed: this is confirmed by lower average receipts, together with higher purchase frequencies than before. People are going to supermarkets more often, but spending less: prices are scary and uncertainty is rampant.

The British retailer Sainsbury's is evidence of how virtuous management of the core food business, price restraint, employee gratification, and fight against waste are the decisive factors in coming out of a difficult phase.

The words of the CEO, Simon Roberts

Simon Roberts, CEO of the British supermarket chain Sainsbury's, recently commented on the actions of the retailer he is leading during this particular historical moment (it is second in market share in the UK, with 15.2%, after Tesco with 27.3% and ahead of Asda with 14.3%).

"We really get how tough life is for so many households right now, which is why we are absolutely determined to battle inflation for our customers," he said. "Our focus on value has never been greater, and we have spent over 560 million pounds keeping our prices low over the last two years. As a result, we are now the best value compared to our competitors. We are two years into our plan to put food back at the heart of Sainsbury's and have focused our efforts on reducing costs right across the business, which has enabled us to make the right decisions for our colleagues and customers," Roberts continued.

"We will continue to work closely with our suppliers and farmers, to whom I am grateful for their support in what has been another difficult year for food supply chains. Over the past year, we have decided to provide 66 million pounds of additional support to British farmers. We made these very deliberate decisions and investments because they make our business stronger, but more importantly because they are simply the right thing to do at this time."

The highlights of 2023

Now that we are midway through 2023, we know that the strategy Sainsbury's will pursue in the near future is based on some noteworthy and

precise subjects. Here they are.

Food First: customers want low prices, exciting new products and great service. This is where Sainsbury's is focusing its time, energy and investments. 560 million pounds is a considerable expenditure that has been incurred to keep prices lower over the last two years, and it is even 10 million pounds more than originally planned and announced.

Nectar Prices (customer retention and digitalisation go hand in hand): the Nectar system offers discounts to loyal customers (both in supermarkets and online) based on the "Your Nectar Prices" programme, which interacts with a digital application. The most active users save nearly 200 pounds per year on their purchases. Currently, there are 11 million digital customers and over 18 million loyal Nectar members. Nowadays, effective retention programmes cannot do without fluid structures inspired by the most modern tools of digitalisation.

Sainsbury's Taste the Difference (comprehensive, quality private label): this retailer's brand based on numerous products has received strong impetus and has grown in both quantity and quality of offerings. In general, the company has significantly improved the profitability of all brands, generating 145 million pounds and thus more "firepower" to use for the core food business.



A strategic vision based on courage and targeted investments

The strategic vision will continue along these lines precisely because of the good results achieved.

Sainsbury's did painstaking work on cost savings, implemented efficiency in all of its departments, in order to outline the productivity mechanisms that are capable of making the massive investments allocated to staff salaries sustainable, and the accounts were not affected.

Environmental sensitivity was manifested through the reduction in absolute greenhouse gas emissions (-38.2% year-on-year). The absolute reduction in plastic packaging for high-volume pro-



ducts was also pivotal, so much so that Sainsbury's itself can take credit for being among the first chains to vacuum-pack all its minced beef. This operation has saved over 450 tonnes of plastic per year.

The English formula for responding to the critical issues brought about by inflation and the consumption crisis involves courage and targeted investments, it implies the generous will to consolidate ties especially with collaborators and suppliers, it expresses the need to eliminate waste that generates inefficiencies and slowdowns in productivity indexes, it imposes the redistribution of cost savings on the actual cut in sales prices, it suggests perfecting the food proposals of



daily consumption by giving impetus to the store brand, it evokes the integration of digitalisation and customer retention, and finally it highlights the importance of being able to convey consistent environmental messages.

Come si esce da una crisi? Il caso Sainsbury's

Il retailer inglese testimonia come la virtuosa gestione del core business alimentare, il contenimento dei prezzi, la gratificazione dei collaboratori e la lotta agli sprechi siano i fattori determinanti per uscire da una fase complessa.

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