

ITALIAN

FOOD

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SPECIAL SWEETS & CONFECTIONERY

New products leading global trends

ORGANIC F&B

Italy raises to the top in Europe

*organic
healthy*



FOCUS USA

Fancy Food Show: Italy is the 2020 partner country

FOODSERVICE

Piadinerie: the success of fast casual food

Processed red tomatoes

Exports (value) 830 millions euros (▲ +8.9% vs the same period of 2018)
Exports (volume) 1.1 million tons (▲ +6% vs the same period of 2018)

January-June 2019 - Source: Agrifood Monitor on Istat stata

Italian exports by country

Country	Value (€)	Change 2019/18	Volumes (kg)	Change 19/18
Germany	155,853,988	+13%	219,455,634	+10.8%
UK	120,821,802	+3.0%	162,473,295	-1.5%
France	75,730,035	+5.0%	90,655,373	+2.3%
Usa	50,885,944	+9.8%	67,645,885	+3.0%
Japan	41,723,741	+3.2%	55,301,949	+3.9%
Libya	35,237,408	+203.8%	38,067,824	+248.2%

January-June 2019 - Source: Agrifood Monitor on Istat data

ry-telling of the best Italian cuisine is also important," she said. The company, which exports to 80 countries, aims to consolidate its presence also in the Far East as a region of future expansion.

Simple genuine recipes and a short and clean list of ingredients are the key factors for the Le Conserve della Nonna brand by Gruppo Fini. "Our products are known for the quality of the recipes, the processing, the raw materials, and our passion for studying and creating products that smell and taste like "home-made" products," Marketing Product Chief Lorenza Baretti said.



"These are the keys of our success, focused on bringing the good Italian cuisine all over the world. Exports account for over 10% of our total turnover. Exports increased significantly in the past 12 months, both for our brand Le Conserve della Nonna and for private label products, thanks to launches in new markets and the activation of trade relations with important retail chains in several European countries such as the UK, Belgium and Spain. Our advantage is to serve our clients by working together to find the best range to offer to the destination market, either with branded products or by developing their mainstream and premium private brands," Lorenza Baretti said.



Trends

- ➔ **ITALIAN ORIGIN** drives foreign consumers purchases
- ➔ In the tomato-based sauce category: **SIMPLE RECIPES** (short list of ingredients and ready to use)
- ➔ Attention to **SUSTAINABILITY** in the packaging choice
- ➔ Variety-**PDO AND PGI**: interest in products from special tomato varieties, such as cherry, yellow cherry tomato, Tuscan and Pugliese tomato and certified products such as Vesuviano and San Marzano

▲ **Germany, UK and France are the top import countries**

	Conserve Italia	Conserve Rispoli
Product	Pomodoro al Vapore (Steamed Tomato) Valfrutta 	Organic Cherry Tomato in tomato sauces 
Characteristics	The range include smooth puree, pulp with large dices, peeled, fine pulp. The natural and genuine taste of tomatoes is preserved thanks to delicate steam processing, a consolidate and successful expertise of Valfrutta also in other product categories.	A new line of Organic tomatoes 100% from Italy in a new environmentally friendly pack. The new Tetra Pak® container offers a double advantage: it guarantees maximum protection of quality and a lower environmental impact.

Source: these charts refer to some products of this category that have been launched abroad by Italian companies in the last 18 months

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● PROMOTION

🕒 Cooking shows and tasting to woo consumers

The organization of in-store promotions allowing to try first hand the quality of products through tasting events is a successful strategy followed by several players. **Coppola Foods**, for example, has implemented with great success in several countries of Europe, Asia and Latin America a program of tasting events called 'Right Tomato, Better Result!', aimed at highlighting the differences between the products of the range and the different ways of use. "We also organize the cooking shows 'The School of Tomato', with local and Italian chefs, where we explain to selected groups of journalists, bloggers and food lovers how different varieties, farming and production methods produce different products with distinctive flavors and use. We are doing this to export our culture together with the product".

● FOODSERVICE

🕒 A growing channel focused on specialties

The out of home is an important market for most players in the "red tomato" segment. **Mutti** offers a complete range, with a special focus on Finely Chopped Tomatoes and Pizza Sauce. The out of home is also very important for **Icab**: more than 70% of foreign turnover comes from the foodservice channel. The company, whose total exports are worth around 5.3 million euros (25% of total turnover) aims to double its foreign turnover in the next two years. "The trend we are driving changes depending on different countries," said **Francesco Franzese, CEO at Icab** (La Fiammante brand). "In northern Europe and especially in the UK we focus on our supply chain and ethical certifications. We are certified by Dnv SocialFoot Print and we will soon adopt the blockchain technology," he said. "In north and south America, we are working a lot on regional specialties, tradition and storytelling. In the out of home, our most popular products include the fine pulp Pa' Pizza and a gourmet range with 20



different unique products. We mostly work with private distributors, in the United States with Cisco and Us Food service, in the UK with Vesty (Franco Manca group) and Gruppo Gino Sorbillo". Foodservice accounts for more than 60% of foreign turnover for **Davia**, thanks especially to peeled tomatoes. The company, which generates around 80% of its turnover abroad (around 16 million euros, up 7%), targets to reach an additional 15% in 2020 by opening two direct offices overseas. "We serve the entire foodservice chain through importers, direct clients and our warehouse," **Sales Manager Cosimo D'Ambrosio** said. In general, in foreign markets we are promoting the concept of *Osù*, or made Only in South Italy, and we focus on certifications, especially for organic products. Peeled tomatoes, available in cans of 3 Kg, are the best-selling product in the segment for **La Doria**, for which the out of home channel generates around 9% of total foreign turnover from processed tomatoes. "They are sold through local distributors mostly in Italian pizzerias and restaurants. Japan and the USA are our top markets for this segment".




Davia supplies Frank Pepe Pizzeria

For the out of home channel, **Conser Italia** proposes the range **Cirio** Foodservice, which offers a large assortment of tomato-based product bag in box packs, which combine ease of use with a good quality-price ratio. Foreign foodservice operators are also interested in regional specialties and quality raw materials. "The growth of gourmet pizza and the search for authentic ingredients has generated constant increase in demand for **Sar Marzano** tomato for which we are very well known in Europe," said **Ernesto Coppola, Ceo at Coppola Foods**. "Foodservice represents around 20% of our sales and we are present with both classic products (peeled and pulp) and premium products such as fine pulp. Our final customers are restaurant chain pizzerias, but we also supply some of the most important airport hubs in Asia

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	Consorzio Casalasco del Pomodoro	Coppola Foods
Product	Sauces in carton bricks Pomi 150 g and 120 g 	Ketchup from organic tomatoes without added sugar 
Characteristics	Sauces in carton bricks, ready to use with 100% Italian tomatoes.	Product with ripe red Italian tomatoes from organic farming. Contains organic apple juice instead of sugar cane, syrup and other sweeteners. Contains around 40% less sugar than traditional ketchup. Every 100g of product are made using 250g of fresh tomatoes.

Source: these charts refer to some products of this category that have been launched abroad by Italian companies in the last 18 months

	Davia
Product	Peeled Tomato Speciali 
Characteristics	Product selected and controlled supply chain and hand-picked dedicated to cooking. Looking for superior quality food. Available in various packaging options.

Source: these charts refer to some products of this category that have been launched abroad by Italian companies in the last 18 months







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In foodservice, **Palo** is betting on the new range 'Il Vesuviano', presented at Anuga, to sell at pizzerias. Present in the foodservice channel only since January 2018, the company, although with a still limited domestic share (6%), offers pulp, puree, peeled and cherry tomatoes through ho.re.ca. distributors and bakery wholesalers. In 2019, it started to work with direct distributors for pizzerias with an ad-hoc promotion focused on "Il Vesuviano." The specialty ranges in glass and bowls are dominated by **Società Agricola Monterosso**, together with the Salse Pronte (Ready Sauces) range. The company, whose exports account for 30% of total turnover, up 50%, aims to confirm the positive trend in the new year. **Passata di Ciliegino Solanino** is instead the new product launched by **Solana** last September. "It's an exclusive variety (SC92) selected and recorded by our technologists and is exclusively grown for Solana," **Export Manager Francesco Nizzoli** said. Specializing in industrial supplies and foodservice (which generates 20% of turnover, in huge growth), Solana exports nearly 18 million euros of products, with a 15-20% growth year on year. Present in

32 countries (Japan being the top market), it hopes to debut in target markets such as South Korea, China and Canada. "Our mission is to educate clients to choose products based on quality, a key element of our production and our company. Our main products are Pomodoro Cubettato and Polpa Fine (diced tomatoes and fine pulp), made with sous vide steam peeling machines and state-of-the-art dicers. We have also started a plant to work with recipes such as Pizza Sauce, Pulp and Puree products with natural spices and condiments." **Steriltom** is also working with the foodservice industry to introduce its own products in the main Italian pizzeria and restaurant chains. "More than 50% of our revenues comes from exports," said **Riccardo Ferri, Foreign Commercial Office**. "The saturation of the European market has convinced us to focus on South America and the Middle East. In terms of trends, bag in box continues to grow. While in terms of product we see growing interest in fresh gourmet products and ready to use. We are launching a new pulp from a cherry tomato variety that has a distinctive sweet taste due to the selected tomato variety".

	Davia	Gruppo Fini	Icab	Italian Food
Product	Peeled Tomatoes Le Specialità 	Condoro Le Conserve della Nonna 	Pacchetella of Yellow and Red tomatoes La Fiammante 	Sughi Petti (sauces) 
Characteristics	Product selected from controlled supply chain and hand grown, dedicated to consumers looking for selected food. Available in 400g packaging.	Ready tomato sauce made of fresh tomatoes from Emilia Romagna and a slight soffrito with fresh vegetables.	Old variety Principe Borghese, has a very thick skin, is cut in half and pressed into glass jars without juice and conservation liquid.	A new line of sauces made of only Tuscan tomatoes, free from added sugar and preservatives, thickeners and acidifiers. With extra virgin olive oil and few simple high-quality ingredients. Eight recipes: 6 with vegetables and 2 with meat.

Source: these charts refer to some products of this category that have been launched abroad by Italian companies in the last 18 months Go to page 54

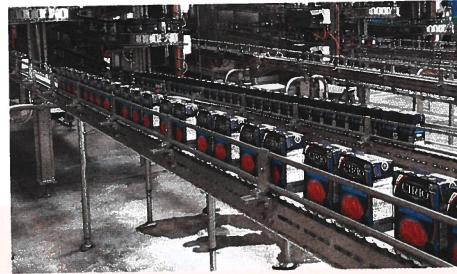
● INNOVATION

🕒 Specialties in the spotlight: from yellow cherry tomatoes to PDO (Vesuviano and San Marzano)

Premiumization and specialization are among the growing trends abroad, said **Mr Marcello Gelo, Global Marketing Director at Mutti**. Exports account for around 45% of the company's production in volumes (up 21%) and 35% in value (+24%). "We are growing in most geographical regions with a premium brand positioning, which translates in coherent price strategies, a higher quality level, and aggressive investment in communications. We are also working on specialization, both in terms of tomato varieties (Baby Roma tomatoes, Cherry tomatoes) and product categories (chopped tomatoes, tomato puree, peeled tomatoes, tomato paste), especially in those market where tomato culture is not that evolved and sophisticated." Specialties include the new range **I Gialli di Agromonte**, made by **Società Agricola Monterosso**, and "produced with yellow cherry tomatoes to give a refined touch even to the most simple and fast recipes," **Marketing Manager Miriam Arestia**

said. **Palo**, whose exports of processed red tomatoes have reached between 42% and 45% with a 6% growth, recently launched **Il Vesuviano**, a product made with tomatoes grown in the volcanic soil of Mount Vesuvius area. "Il Vesuviano is a firstling in the segment of processed tomatoes," **Commercial Director Giuseppe Mirra** said. "Born from an idea of company owner Nicola Palo, it has achieved such excellent results that next year we intend to double sow them". The company also processes **San Marzano PDO** tomatoes. "It's the most representative product of our brand, especially in the US market, with a retail

format of 400 g and the 2.6 Kg can for the horeca channel". **Pastificio Granoro**, whose exports of processed red tomatoes account for around 6% of turnover, produces **Passata di Datterini Dedicato**. "The product is renowned for its color, flavor and intense sweetness and it's made only with datterini cherry tomatoes grown by our farmers in Puglia," **Export Manager Michele Dell'Aquila** said.







Cirio's factory

● PACKAGING

🕒 Sustainability first

In addition to informing customers, packaging must be sustainable and improve the consumption experience. "We use cans that are BPA-free, can be piled up for a better use within the stores or single dose packaging for singles and small families", **Ernesto Coppola from Coppola Foods** said. "We are also trying to reduce to the minimum the use of plastic in secondary packaging by replacing it with cardboard when it's possible." **Sandra Sanguolo from Conserve Italia (brand Cirio)** said **eco-friendly packaging with low environment impact are very appreciated**. "For example, there are the briks made for the new range Tetra Recart which we started in the Ravarino plant for the last tomato harvest".

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	Mutti	Palo Food	Pastificio Granoro	Società Agricola Monterosso
Product	Simply Sugo range 	Il Vesuviano 	Passata di Datterini Dedicato (Cherry tomatoes puree) 	I Gialli di Agromonte 
Characteristics	Available with Basil, Chilli, Olives, Grilled Vegetables and Parmigiano Reggiano Cheese, the range showcases the respect for tradition and know-how that have been at the heart of the Mutti philosophy since the beginning.	Tomato variety grown in the region of the Mount Somma Chain, of which Mount Vesuvius is part. Thanks to this natural constant irrigation, tomatoes have excellent organoleptic qualities.	Made only of datterini tomatoes grown in Puglia and known for their intense red color. Picked at the right ripeness, they are processed within 24 hours to preserve flavors, scent and nutritional qualities.	Made of yellow cherry tomatoes, the sauce is dense and rich. Ready to use, it enriches every dish with its delicate and unique taste. 100% natural, free from gluten, concentrate, coloring and preservatives.

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● INGREDIENTS

🕒 Focus on regional raw materials

Made in Italy remains a globally renowned value abroad and in the category of processed tomatoes Italy offers an excellent raw material," said **Carlo Erba, Sales Director of Italian Food**, which owns the Petti brand. In 2019, the company supported the expansion of the Petti brand in Scandinavian countries, the Netherlands and France and is now strategically planning for the gradual penetration of other markets, especially the United States. "The quality of our Italian products perfectly aligns with trending interest in the regional origin of raw materials that sees us produce a range made with 100% Tuscan tomatoes," Erba said. "This advantage opening many doors for us abroad and has a strong identity because Tuscan is known all over the world as a symbol of excellence. Another important trend is the certification of raw materials at the supply chain, driven by demand for transparency and traceability of products made according to clear and shared ethics through the entire production process," Erba said. **Rosso Gargano** said peeled tomatoes are a trending product in international markets. "The typical variety from Puglia region and especially the province of Foggia is one of a kind," **Marketing Chief Roberto Parisi** said. Exports represent 55% of the company turnover, up 2% year on year. The goal is to strengthen the positioning of the brand in the United States and reach countries where it is not yet present

▲ Pure sauce, peeled tomatoes and tomato paste lead exports

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▲ **Puree sauce, peeled tomatoes and tomato paste lead exports**



PDO-PGI

The Italian certified tomatoes



POMODORINO DEL PIENNOLO DEL VESUVIO PDO

- Grown only in some areas in the province of Naples with a traditional method, it has a hard skin and firm and compact pulp, a sweet flavor and a slightly acidic aftertaste.
- The traditional conservation technique is to keep them hanging in whole bunches, known as "piennoli" (or pendulums), in dry and ventilated places.



- They are kept in traditional glass in the shape of "pacchiette", or cut into pieces and pressed into jars.

POMODORO SAN MARZANO FROM AGRO SARNESE-NOCERINO PDO

- Grown in 41 towns of the Agro Sarnese-Nocerino area listed in the official production regulation, it is recognizable for its plum shape and its unique organoleptic characteristics coming from the climate and the volcanic soil, as well as because they are easy to peel.
- They have low water content, firm flesh, a high ratio of flesh to weight, and fewer seeds that make them



suitable for sauces, pizza, and Italian dishes of all kinds.

- It can be processed only as whole peeled and fillets, and packaged in glass containers and tin containers with double cold reduction technology.

POMODORO DI PACHINO PGI

Available in the varieties Ciliegino (cherry), Costoluto (large salad tomato), Tondo Liscio (round and smooth) and Grappolo (grape), it is grown in the province of Siracusa (Sicily). A mix of factors (the soil, light, temperature, irrigation waters) make the product extraordinarily flavorful, scented and consistent.

