

# Largo Consumo



## The production chains

HISTORY, FIGURES, PRODUCTS, SALES CHANNELS, INDUSTRIAL STRUCTURE, PROCESSES, CERTIFICATIONS, COMMUNICATION CHOICES

According to

BF Agro-Industriale



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# SUMMARY

## Production industries

According to

BF Agro-Industriale



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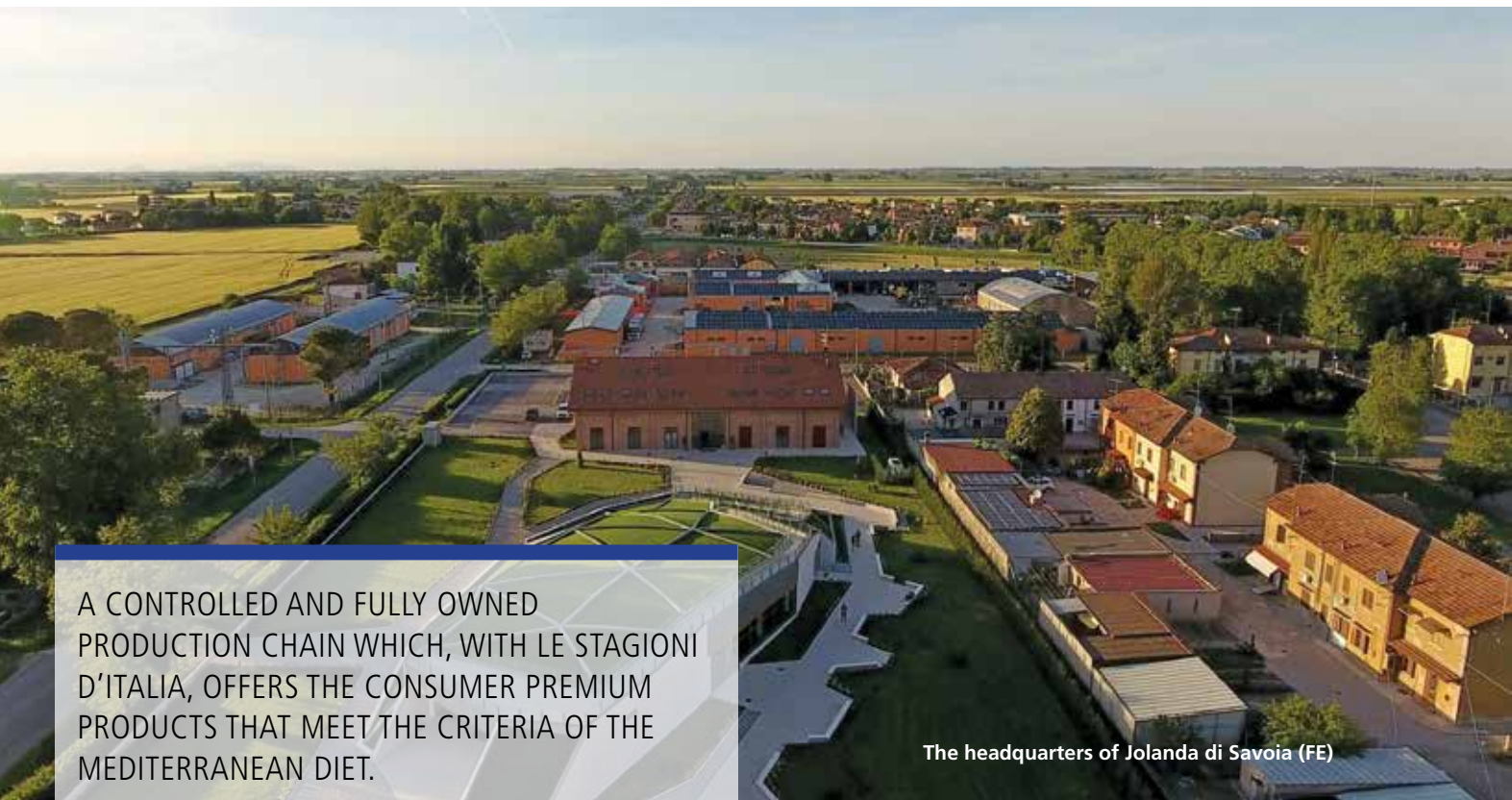


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## Retail sales are growing and domestic consumption is expected to increase by about 6% compared to 2019

The Italian agri-food industry, which managed to hold its own during the lockdown, risks closing 2020 penalised on two significant fronts: consumption outside the home, due to the negative consequences of the months of almost total closure of premises, and exports, whose flows have suffered repercussions from the health restrictions in force in the various countries. Regarding the catering channel, which in 2019 almost reached 86 billion Euros of household spending, with a real increase of 1.6% over the previous year, the latest Ismea estimates indicate a potential decline of 40% in 2020, equating to a loss of around 34 billion. However, this figure is offset by a growth in retail sales, a trend which permits forecasts of an increase in domestic consumption, in the year, of about 6% compared to 2019. Combining these two trends, the overall impact on domestic and non-domestic agri-food expenditure for 2020 would result in a reduction of around 10%, amounting to about 24 billion Euros. Retail sales also remained buoyant in the first half of May, with the week from 11 to 17 May, which saw the first re-openings and the easing of containment measures, marking increased spending on packaged foods on an annual basis of +11% as a national average. Compared to the previous period, however, there has been a change in habits: fewer “basic” foodstuffs, such as flour (from +142% to +70%), pasta (from +24% to +4%) and eggs (from +36% to +17%), but more purchases of sparkling (+ 20%) and still (+ 15%) wines.

# THE B.F. SPA GROUP



A CONTROLLED AND FULLY OWNED PRODUCTION CHAIN WHICH, WITH LE STAGIONI D'ITALIA, OFFERS THE CONSUMER PREMIUM PRODUCTS THAT MEET THE CRITERIA OF THE MEDITERRANEAN DIET.

The headquarters of Jolanda di Savoia (FE)

Established in England in 1871, **Bonifiche Ferraresi** concentrated its efforts on an impressive effort regarding the purchase and reclamation of swamps, lakes and land in the vicinity of Ferrara and in other places in the Kingdom of Italy, which immediately positioned it at the top of the domestic and European agricultural market. Buoyed by its rise, the Emilian agricultural business increased its ownership of land, which in 1929 exceeded 25 thousand hectares. In 1942, the Bank of Italy became the largest shareholder and in 1947 the company was listed on the stock market. Acquired and relaunched by an Italian holding company in 2014, through a series of operations and acquisitions (including SIS, Società Italiana Sementi, a leader in native seed production, **Zorzi dal 1828** a brand in the world of legumes), the company evolved from an agricultural business

to a veritable agro-industrial group: **B.F. S.p.A.** was born and is now one of the largest Italian agricultural companies, with over 6,500 hectares of agricultural land in Emilia, Tuscany and Sardinia, production plants in Jolanda di Savoia (Ferrara), Cortona (Arezzo), Monselice (Padua), Rimini and Arborea (Oristano), and graces the tables of Italians with two brands: **Le Stagioni d'Italia** and Zorzi dal 1828. Thanks to a fully controlled and owned production chain, the company's Le Stagioni d'Italia brand offers consumers a range of premium products that meet the criteria of the Mediterranean diet in terms of variety and territorial specialities, as well as respect for seasonal cycles. The company, led by CEO **Federico Vecchioni**, has planned further phases of development, starting with the recent acquisition - for 25 million Euros - of 35% of the share capital

## The company in figures

Headquarters: **Jolanda di Savoia (Ferrara)**

Production sites: **5**

Product categories: **6**

Employees: **305**

2019 production value:

**96.8 million Euros**

Channels: **Large-scale distribution 81%, Horeca 9%, Wholesalers, E-commerce, Special Clients 10%**

Products: **55 Le Stagioni d'Italia; 145 Zorzi since 1828.**

of **Master Investment**, the holding company of the **Matt** group, a player in the sector of food supplements, functional foodstuffs and cosmetics for the well-being market. The aim of BF is to strengthen the production chain of medicinal plants and nutraceuticals.

## Medicinal herbs

Taken over in 2017, renovated and inaugurated in June 2019, Bonifiche Ferraresi's Sardinian estate - the heart of the medicinal herbs supply chain - has a UAA totalling 894 hectares, of which 508 are organically grown. It is the largest single organic estate in Italy. Once redeveloped and mapped from a paedological point of view, the physical-chemical characteristics of the soil were identified, as well as which areas were most suitable for the cultivation of medicinal plants used for Le Stagioni d'Italia branded herbal teas and infusions: lemon balm, mallow, passion flower, peppermint, lavender, oregano, chamomile, sage, echinacea and many others. Only Mediterranean plants, grown with the use of precision agriculture and strict biological protocol controlled and certified by **Valoritalia**, without the use of herbicides - weed control is partly done manually -. Some of the medicinal herbs grown are annual species, such as chamomile, whereas others are multi-annual, such as rosemary, and do not need to be transplanted every year. Regarding the annual species,

organic seedlings are transplanted in the months of May and June. For the harvest of each single species, the phenological states are identified using checks in the field to pinpoint the correct moment for harvesting, in which the balsamic

ingredients of the plants are highest. The first part of the process consists of cutting the aerial (or apical) part and immediate desiccation on site. An environment so ideal for cultivation that medicinal plants can be cut several times during a year.



The headquarters of B.F. Spa in Sardinia (Oristano)

B.F.'s fields of medicinal herbs



## THE "BF" METHOD. Precision agriculture

Crops are continuously monitored by a satellite system, both in the field and remotely. The mapping of the fields allows spatially differentiated agronomic inputs according to the different conditions of soil fertility. Technologically advanced equipment allows sowing

to be controlled based on individual sections and rational water management. The use of weather stations with humidity sensors for the hourly monitoring of every parameter of each crop allows optimal irrigation management. Processing, following organic regulations, is performed using mechanical and sometimes manual methods. The recording of the data of each single operation in the field also allows the construction of a traceability system for all the phases of cultivation and the subsequent production process.

Control Room – ibf servizi (Ferrara)



For the precision agriculture part, support in the field is guaranteed through IBF Servizi - a company belonging to the Bonifiche Ferraresi Group - specialised in the use of the most advanced techniques and technologies available in the agricultural world to monitor real cultivation needs in a timely manner and intervene in the field only when necessary, rationalising the use of fertilisers, plant protection products and fuel. The company not only monitors the fields of Bonifiche Ferraresi, but also manages over 70,000 hectares in Italy.



**Francesco Formisano**  
Sales and Marketing Director  
Bonifiche Ferraresi

## “From the genome to the shelf”

«Bonifiche Ferraresi’s mission is to bring quality products to the consumer’s table thanks to innovative agriculture aimed at environmental and social sustainability. Quality for “Le Stagioni d’Italia” is across the entire production process, which starts from the genome and ends on the shelf. The common denominator of the range of products, from pasta to rice, from herbal teas to legumes and cereals, is the great Italian agriculture (the brand’s payoff), which implements the innovative methods and technologies of agriculture 4.0 to every aspect of production. Precision farming - Bonifiche Ferraresi’s flagship – focusses on the territories, crop rotation and therefore also cultural biodiversity, the careful use of scarce resources, such as water, as well as the targeted and prudent use of pesticides, thereby obtaining greater efficiency. A short supply chain – locally produced, in some categories - is an important and differentiating element for “Le Stagioni d’Italia” and its quality. The supervision of every step, from sowing to marketing, with a traceable production process and in full observance of seasonality».

## THE BIOLOGICAL CHAIN.

“Le Stagioni d’Italia”: 100% Italian herbal teas and infusions



“The desiccating of medicinal plants takes place directly in Bonifiche Ferraresi Sarde”, explained **Marzia Ravanelli**, B.F. S.p.a.’s group quality and food safety manager, “in dedicated ventilated ovens at controlled temperatures and involving initial storage in special warehouses to ensure that they retain all the nutritional properties and characteristic functional benefits. In Tuscany, at the Cortona plant, the first processing step takes place: the medicinal plants are cut and cleaned of impurities with the aid of magnets and optical sorters. About 50% of the plants harvested remains. After this first step, called “industrial cutting”, the plants are ready to be sold to the industry. The processing continues with the

“herbal tea cut”, where the medicinal herbs become a product intended for herbalists, and then moves on to the third phase, which is the “filter cut”, in which the herbs are finely cut and packaged in sachets and transformed into “Le Stagioni d’Italia” herbal teas and infusions. Packaging involves dosing and blending herbs, which are then packaged at a rate of about 120 sachets per minute, differentiated between mono-varietal infusions and food supplements, all branded “Le Stagioni d’Italia”. Throughout the production process, strict quality controls are carried out both on the agricultural part, involving organic agriculture checks, and on the transformation, involving residual humidity controls, microbiological controls, verification of the absence of pesticides, heavy metals and aflatoxins, confirmed by the certification body and laboratory tests. Specific quality controls also take place during and after packaging. The know-how accumulated in recent years on the agricultural, production and processing aspects has also allowed the B.F. Group to become a qualified partner in private label projects with certain Italian large-scale distribution chains”.



## News

“Le Stagioni d’Italia” organic herbal teas and infusions



Le Stagioni d’Italia worked on the development of the new range of organic herbal teas and infusions that it will be offering on the market from autumn 2020, producing not only a new design, but also enriching its portfolio. The organic range replaces the current conventional one and is divided into two lines: the mono-varietal line and the functional one. More specifically, there are 5 mono-varietal products: sieved chamomile, lemon balm, peppermint, mallow and the additional sweet fennel. The 6 functional herbal teas are a blend of Mediterranean medicinal herbs that provide 100% natural effectiveness: digestive, relaxing,



antioxidant, purifying, draining and regularity. None of the products have added flavourings or extracts, but can be sweetened by adding one of Le Stagioni d'Italia's honey products (Millefiori or Alfalfa). The packets are made of 20-gram FSC paper, with 10 filters enclosed in special aroma-saving sachets, to preserve the properties and the intense scent of the medicinal herbs. The aroma-saving sachet is also printed using an FSC paper sleeve. Each filter is made without glues or staples. This means they can be fully recycled and disposed of in paper and organic bins. Consumers can use the QR Code on the packaging to view videos of the fields in Sardinia and the production process.



## Infusion, herbal tea and chamomile market: sales trend, by volume and by value, by type

(in filters and Euros, YTD June 2020)

Value (Euros)	293,521,669
Year-on-year % change in value	+7.3
Volume (U.M.)	3,057,235,504
Year-on-year % change in value	+5.5
Unit (Pcs)	134,519,103
Average price	0.1

## Infusion, herbal tea and chamomile market: monthly trend of sales by volume

(YTD June 2020, in millions)

June 2019	220.3
July 2019	145.5
August 2019	139.2
September 2019	220.7
October 2019	220.1
November 2019	263.2
December 2019	328.7
January 2020	302.6
February 2020	187.9
March 2020	397.8
April 2020	265.7
May 2020	237.7
June 2020	248.0

**Herbals teas market is growing. Herbal teas and infusions are evolving and gradually seasonally adjusted.**

## Communication

"Le Stagioni d'Italia - la grande agricoltura italiana" introduced itself to the market in a television campaign created by the **Aldo Biasi Communication** agency and focussed on agriculture and the fields of Bonifiche Ferraresi, where farmers look after the fields "in memory of the past and according to the science of the future". A campaign that saw both **Senatore Cappelli** pasta and Po' Delta rice products take centre stage, soon to be joined by the herbal teas. Autumn should see the launch of both print and web campaigns, as well as a collaboration with Il Corriere della Sera-online in October. Le Stagioni d'Italia is on the internet with an updated website for the launch of the new line of organic herbal teas and has a substantial presence on social media, **Facebook** and **Instagram**.



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# THE CLAI GROUP



THE COMPANY OPERATES ON THE DOMESTIC AND INTERNATIONAL MARKETS WITH VARIOUS SPECIFICITIES AND A WIDE RANGE OF EXCELLENT CURED MEATS AND HAMS PRODUCED EXCLUSIVELY USING A SELECTION OF 100% ITALIAN MEAT

Headquarters in Sasso Morelli in Imola

## The company in figures

Name: **CLAI**

Headquarters: **Villa La Babina**  
and **Sasso Morelli, Imola (Bologna)**

Employees: **540**

Breeder members: **150**

Turnover in 2019: **270 million Euros**

**T**he **CLAI - Imola Agricultural Workers Cooperative** - group, was founded in 1962 to support the agricultural world in Emilia-Romagna, a land rich in traditions and passion that wants to provide a unique response to the needs and expectations of change in the agri-food sector. Today, CLAI is one of the most important Italian agri-food cooperatives and, under the "CLAI" and "**Zuarina**" brands, operates in the cured meats and fresh beef and pork sectors, and under the "**Faggiola**" brand in the dairy sector. The Group operates on the domestic and international markets with various specificities and a wide range of excellent cured meats and hams produced exclusively using a selection of 100% Italian meats, with pigs born

and raised in Italy. Three generations of approximately 150 breeders belonging to the CLAI Group



have managed their own farms and provided livestock to the cooperative. Attention to nutrition, animal welfare and good farming practices have always been the group's priorities. CLAI cultivates land, manages its own breeding and the provision of livestock by the breeder members, as well as carrying out every processing phase internally - from slaughter to production - controlling the entire meat chain, a 100% Italian chain.





## Production

CLAI breeding members work mainly in central and northern Italy, in Lombardy, Veneto, Piedmont and Emilia Romagna. The meat processing and cured meats production plants are in Emilia Romagna, at the Imola and Faenza sites. The production capacity of the CLAI plant in Imola is over 200 tonnes of salami per week. Parma ham, on the other hand, is made in the Zuarina ham factory in Langhirano (Parma), where organic Parma ham is also produced. Founded in 1860, Zuarina sells several distinctive specificities on the domestic and international markets, such as the careful selection of exclusively 100% Italian meat from an integrated proprietary supply chain; focus on every stage of the process, from salting to “cool” resting; preparation for slow maturing that takes place in the underground cellar.



The CLAI family then expanded, diversifying production, opening up to the milk and cheese sector through the acquisition, in 2019, of Cooperativa Agricoop of Palazzuolo sul Senio (Florence) and the “Faggiola” brand, a historic dairy brand. The transaction was carried out with a view to safeguarding agri-food

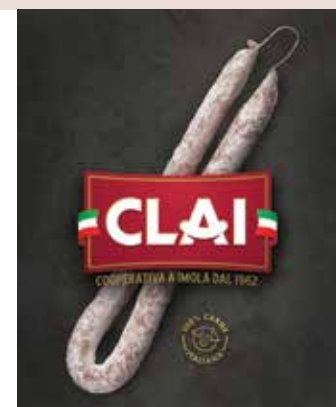
excellence, protecting traditional production craftsmanship and enhancing the well-being of the local community. La Faggiola is a brand of cheeses produced using mountain milk, still processed by hand today by master cheesemakers, but with all the safety of certified quality and continuous innovation.



## SPECIAL QUALITIES

### Dried sausage

The cured meat symbol of the value path undertaken by CLAI is the “**Salsiccia Passita**” (“Dried Sausage”) (<https://nuovo.clai.it/>), an excellence of the rural and gastronomic tradition of Romagna, land of the Cooperative. Stuffed in a natural casing and produced exclusively with the best lean Italian pork, the “Passita” is characterised by easy peelability, with a sweet, tender, melt-in-your-mouth taste. Ever since pigs were raised as the family “piggy bank”, every house had a characteristic and precious stock of cured meats hanging in



the kitchen. Dried sausage was the first cured meat to be eaten immediately after the fresh meats.

The spices and salt protected the meat from the particularly humid environment of the Emilia-Romagna plain. With the Dried Sausage, CLAI has reproduced the ancient tradition of its land using only the best lean Italian pork with the right amount of fat, processing, desiccating and maturing in static cold storage rooms.



**Pietro D'Angeli**  
General Manager of CLAI

## “Happy salami”

«The first time Rob Janoff came to visit us, this phrase came out: we exist to create “happy salami” with “happy workers”. This is the climate that reigns in CLAI. We combine the experience of young graduates, knowledge from the University of Bologna with which we collaborate, and the “ancient know-how” of our experienced elder workers, together with technology renewed by the work we are concluding in the cured meats factory - which we have invested 12 million Euros in.

The workplace is also important: we have privileged natural light in the renovated factory, so that people feel comfortable, are happy with their jobs and can work in a creative environment. In addition, new raw material control and checking systems have been developed, which few companies in Italy have. Tradition and innovation come together in CLAI. Above all, our cooperative has social value, it aims to enhance the good that exists in all people, and offers a healthy, genuine and tasty product in an ethical-social dimension with respect for the environment. We have also resumed hiring staff, despite the difficulties caused by the economic crisis. Our values are those of sociability, ethics, transparency, knowing how to create and be together, with a view to building continuously».

### Sales of cured meats in Italy

(set weight + variable weight, YTD October 2019)

	Sales by volume (in millions of kg)	% change	Sales by value (in millions of Euros)	% change
<b>Total</b>	<b>299.5</b>	<b>1.3</b>	<b>4,869</b>	<b>1.7</b>
Denomination	49.4	1.5	1,180	1.8
Non denomination	250.0	1.3	3,689	1.7

Source: Iri



### Markets and channels

The CLAI supply chain integrates and guarantees the heritage of tradition with the new nutritional needs and lifestyles of modern consumers. The tables of consumers are not only reached through the various sales channels in which the cooperative operates (Large-scale distribution 55%, Normal Trade 45%), but also through a local network of nine traditional outlets, with proprietary gastronomy in Romagna, in which daily relationships develop between our 70 employees and final consumers.

Regarding distribution, CLAI also has a fleet of its own vehicles. Exports amount to 40% of turnover, of which CLAI cured meats hold a 20% share. The main countries to which we export are: England, Germany and France.

**The Sasso Morelli**  
salami production  
plant

## News. Rebranding the logo

Over the last year or so, the group has decided to review its positioning starting from its history, but also by trying to shape the future of its brand.

Aided by an analysis of production and business processes carried out by Bicocca University in Milan, it then turned to a world-famous designer, **Rob Janoff** (the person who created Apple's famous logo) for the creation of a new brand, which has been visible to the public since July 2020, through various media. In addition



to the logo, the packaging of the products also changed following an analysis of the entire value path of the cooperative. The end goal of the operation is to make CLAI well-known throughout

the Italian market, together with its tasty and healthy products, which are also trustworthy from a food safety point of view and completely made in Italy in an ethical and sustainable manner.

Abroad, the rebranding will be introduced for the first time at the **SIAL** fair in Paris in October.

## Communication

The new brand was supposed to be communicated in spring 2021, but CLAI preferred to convey a strong message of reconstruction in difficult times: therefore, communication of the rebranding started in July. The aim of the message is to make it clear that CLAI

is still the Cooperative that consumers know, but has a new face and wants to rebuild itself and our beautiful country. Communication will focus on the flagship product, the first product made by CLAI, namely the dried sausage, which is typical of Romagna, with a

recipe that has not changed since the '60s and the aim of promoting it at a national level. Furthermore, CLAI is launching a new, traditionally produced salami without preservatives. The restyling will involve every product and every image.



### “From the field to the table”

“Since its founding in 1962, our agricultural cooperative has been characterised by the singular composition of its corporate base made up of farmer members, families

**Giovanni Bettini**  
Chairperson of CLAI

engaged in the breeding of pigs and beef livestock, as well as worker members in various roles throughout the company. It's an example of participatory management that is unique on the European agriculture scene, which promotes the products of Italian animal husbandry involving artisanal processing carried out by expert butchers who have mastered the transformation of meats for the production of salamis and hams belonging to the best traditions of our country. An authentic cooperative supply chain that has placed growth and sustainable development at the core of the company's objectives. CLAI maintains a deep bond with the communities and territories where it is located, enhancing the social, cultural and environmental aspects, in particular at “Villa La Babina”, the historic site in Imola,

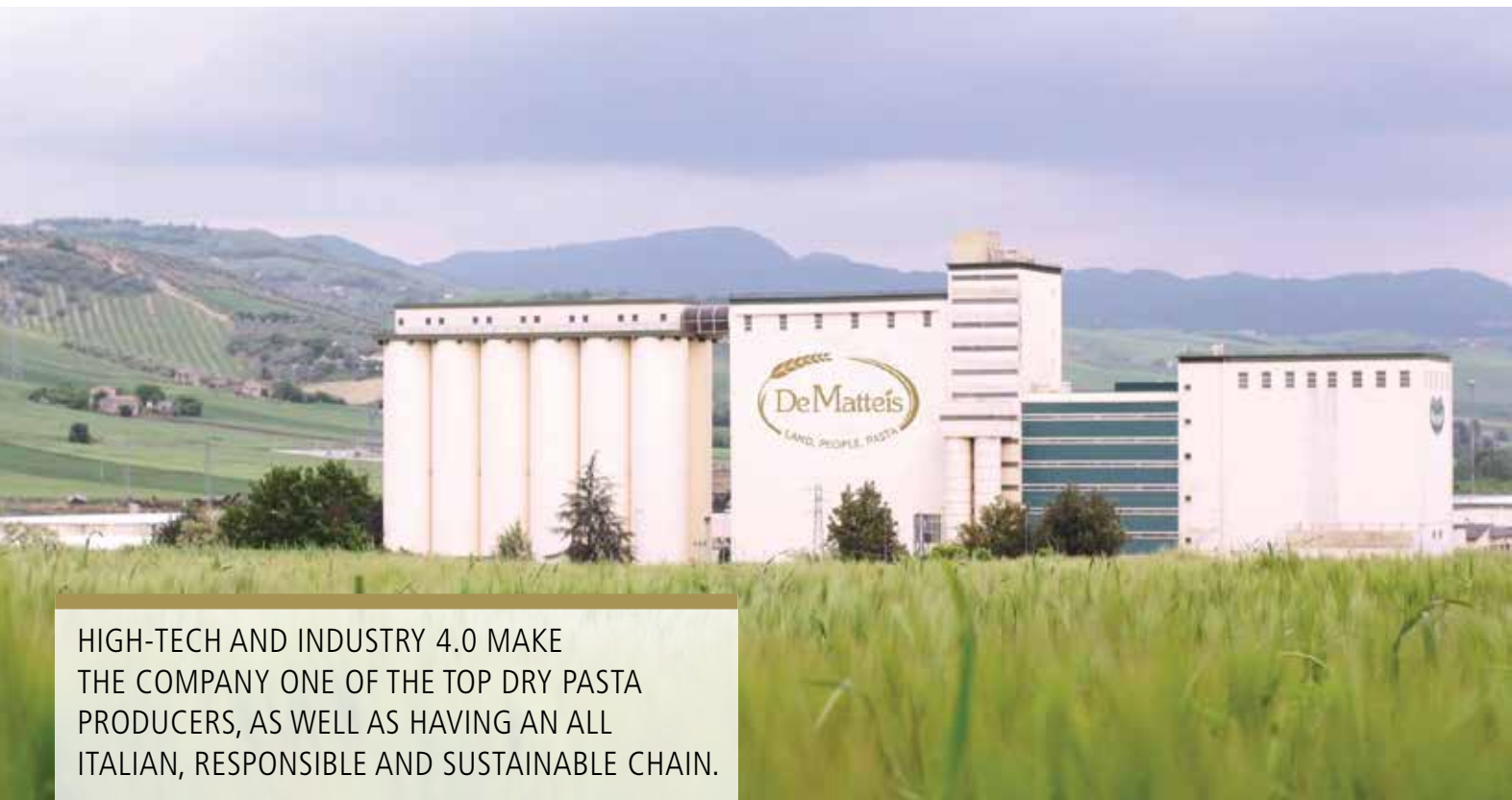


which is an exemplary complex consisting of an 18th century manor house, garden park and countryside. Thanks to careful renovation, CLAI has restored it to a role of headquarters, a place for training and representation that includes a green path leading down to a cured meat factory immersed in a beautiful, fertile farm. The identity factor at CLAI is fundamental: the person is at the centre of the company and cooperative values are good for the company. The aim of the new logo is to convey the concept that there is a home, Casa CLAI, which cares about the well-being of consumers by offering an integrated supply chain that really goes from the field to the table, surrounded by family and friends. We want to transmit trust: it's a company that is not afraid of the future and lays the foundations for building together every single day”.

### CLAI sca

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# DE MATTEIS AGROALIMENTARE



HIGH-TECH AND INDUSTRY 4.0 MAKE THE COMPANY ONE OF THE TOP DRY PASTA PRODUCERS, AS WELL AS HAVING AN ALL ITALIAN, RESPONSIBLE AND SUSTAINABLE CHAIN.

**D**e Matteis **Agroalimentare** was founded in 1993 in Flumeri (Avellino), when the De Matteis and Grillo families took over a pasta factory in Irpinia, at the centre of the wheat production pole located between Campania, Puglia and Molise.

De Matteis Agroalimentare is still controlled by the founding families and it is run by the chairperson, Cavaliere del Lavoro (Order of Merit for Labour), **Armando Enzo De Matteis**, and the managing director **Marco De Matteis**. The company is one of the top ten producers of high quality dry pasta - including private labels - in the world, with a turnover in 2019 of 155 million Euros, up 35% compared to 2018, and 270 employees.

The company's turnover growth rate has been one of the fastest on the market. The company is represented on the market by three proprietary brands: **Pasta Armando**, marketed in Italy and in ten other countries around the world, **Baronia** and **Donna Vera**, which are mainly for export.



## The company in figures

Name: **De Matteis Agroalimentare SpA**

Production site: **Flumeri (Avellino)**

Foreign commercial offices: **1, in the USA**

Employees: **270**

Partner farmers: **1507**

Turnover in 2019: **155 million Euros**

## Production

De Matteis Agroalimentare has two production plants: one in Campania, in Flumeri (Avellino), with 12 production lines, and one in Umbria, in Giano (Perugia). Together, they have 16 lines and have an annual production capacity of 182,000 tonnes. De Matteis is one of the few companies in the sector to have its own mill directly connected to the pasta factory (in Flumeri).

It was in Flumeri, at the end of February, that the company inaugurated a new technologically advanced production line using the PastaSense system, developed with the Swiss group Bühler, a world leader in the construction of high-tech industrial plants, which sees the company adopt the Industry 4.0 vision. The **Bühler PastaSense** system allows automatic monitoring of the composition of the pasta and



The Bühler PastaSense system

its desiccation kinetics, ensuring its compliance with standards, thanks to checks carried out every 3 seconds.

The introduction of the new line, which alone produces 3,200 kg of pasta per hour, is part of the development process of the plant in Campania, in which the

company has invested 16 million Euros over the last year and which has led, overall, to a 30% increase in production. The expansion also involved hiring 40 new employees over the course of 2019 and places De Matteis Agroalimentare among the top employers in the province of Avellino.

## SPECIAL QUALITIES

### Commitment to sustainability

Since its incorporation, De Matteis Agroalimentare has pursued environmental sustainability in its activities. The plant in Flumeri has a cogeneration system capable of covering over 80% of the company's energy needs. In terms of lower emissions into the environment, this solution translates into 1,865 tonnes less of CO<sub>2</sub>, a saving of 1,941 TOE (tonnes of oil equivalent) and 32,700 MWh of thermal recovery every year. The goal is to guarantee 100% of the plant's energy needs by the end of 2020.

The pasta factory has also worked on reducing polluting emissions related to logistics, choosing to favour Italian quality durum wheat and, consequently, reducing imports of raw materials from abroad. De Matteis also intervened on the environmental impact of packaging by reducing the use of plastic materials, replaced by innovative and eco-friendly, biodegradable and compostable materials. Today, Pasta Armando packs are totally recyclable and go into paper bins.

An image of the mill integrated in the factory





**Marco De Matteis**  
Chief Executive Officer  
De Matteis Agroalimentare

## “An all-Italian supply chain”

«All our efforts in recent years have been aimed at raising the quality and efficiency of what we do with a view to continuous growth, respect and adherence to the principles of sustainability. The company's commitment to creating the farming community of the Armando Supply Chain has paid off: 10 years after it began, the Supply Chain has over 1,500 farms that produce according to a rigid and sustainable policy aimed at achieving the best quality Italian wheat, produced while respecting the environment and the best agricultural traditions. The pact we make with our farmers involves an agreement, through which we have managed to redistribute a surplus of 9.7 million Euros in the territory over ten years. The first quarter of 2020 recorded a further growth of +15% in sales, with revenues of 56 million Euros and the performance of the Armando brand equal to +30%».

## Responsibility and the territory: the “Patto Armando”

The “**Patto Armando**” (“Armando Pact”) - which takes its name from the chairperson, the Cavaliere del Lavoro (Order of Merit for Labour) Armando Enzo De Matteis - is a bona fide contract that the company has had with a number of Italian farmers for ten years and is renewed every year directly with each farm and with participating storage providers. Today, there are 1,507 farmers, true partners, spread over eight regions: Puglia, Campania, Basilicata, Marche, Abruzzo, Umbria, Tuscany and northern Lazio. Farmers undertake to sow the durum wheat varieties agreed with the De Matteis pasta factory and cultivate them in compliance with a strict policy aimed at achieving a high protein content (at least 14.5%, as opposed to the minimum value of 12.5% established by law) and a high gluten index. The policy

also regulates the use of plant protection products and the type, quantity and ways in which these substances can be used in the fields. For its part, the company is committed to providing support in the

field with dedicated agronomists and to purchasing the harvest at a guaranteed minimum price. Furthermore, the amount paid to farmers increases in proportion to the quality of the harvest.

### Dry pasta: Italian trade balance

<b>Exports (year-on-year % change, 1st quarter 2020)</b>	+20%
<b>2019 Exports</b>	2.6 billion Euros
<b>Foreign sales (year-on-year % change, March 2020)</b>	+21% (+97 thousand tonnes)
<b>Domestic demand (year-on-year % change, March + April 2020)</b>	+40%
<b>Raw material imports (year-on-year % change, July 2019 and February)</b>	+54% (+1.8 million tonnes of foreign grain)

Source: Istat



## Markets and channels

De Matteis exports to over 40 countries on 5 continents. Exports represent 80% of turnover (recording a growth of +15% in 2019 vs 2018). During 2019, a branch was opened in the United States, the biggest foreign market, followed, in Europe, by Germany. Today, in the US, the company is consolidating with an 11% share of the entire sector's exports to the country. Meanwhile, the Pasta Armando brand is being introduced in China, South Korea and even Finland, where it is entering the main distribution chains.

80% of De Matteis's production is made on behalf of third parties for some of the main large-scale distribution brands in Italy and abroad. Italy is increasing significantly: in 2020, De Matteis will focus on the distribution of Pasta Armando, in particular. Sales in the Italian market are currently 40% in large-scale distribution and 60% in traditional retail. Campania, Lombardy, Veneto and Sicily are the main sales areas. Furthermore, the e-commerce channel grew during lockdown, recording a double-digit increase.

## News

### Pasta Armando "Zero residues of pesticides and glyphosate" method

The new line of **Pastine Armando**, a product made with only 100% Italian grain and certified "zero pesticide residues and zero glyphosate", has been on the shelves since November 2019. The line consists of five products: Stelline, Orzi, Alphabet, Pasta Zoo and Thimbles. Pastine Armando contain less than 0.00001 g (technical zero) residue of the most common plant protection products used in the cultivation and storage



of durum wheat, such as glyphosate. This is guaranteed by numerous checks performed by the company and certification by a third party called **Bureau Veritas**. The pack has also been designed with respect for the environment: it is eco-friendly, consists of a practical **FSC** (Forest Stewardship Council) certified casing and is disposed of entirely in the paper bin.

All pasta in the "Il grano di Armando" line is certified "zero residues of pesticides and glyphosate" since March 2020: together with Le Pastine, it is the first line of pasta with wheat deriving from conventional agriculture to be launched on the market with this guarantee. Thanks to the simultaneous presence of a mill and the pasta factory, the quality of the product is checked and certified at every step (from the field to the arrival of the wheat at the plant, right up to final packaging), both directly by the company and through external checks.

## Communication

### Armando's manifesto: looking after wheat.

#### 1 The search for excellence.

Armando is a project that was created to grow the best durum wheat in Italy, thanks to a community of people who look after the product from the field to the table, day after day.



**2 A single supply chain, since 2010.** A direct supply chain contract between a pasta producer, De Matteis, and over 1,500 Italian farmers who make their living from wheat. A pact to defend Italian agriculture and ensure the future of wheat cultivation in our country.

**3 Method, research, innovation.** It is the development of agronomic practices that are sustainable for the Earth and safe for people: the only pasta in Italy with third-party certification of zero pesticide residues - zero glyphosate.

**4 A true story of sustainability.** Armando respects the environment and thinks about the present and the future of the planet: that is why it has chosen packaging that can be completely disposed of in paper bins.

**5 Leader in relationships.** It is a community of people, the wheat families, who come together to make 'good' products for others. It is the rediscovery of agricultural values, of the relationship between mankind and the land, to defend the genuineness of what we eat and take care of it.



**Fabrizio Nucifora**  
Brand sales e Marketing  
Director  
De Matteis Agroalimentare

### "All round communication"

«In February 2020, Pasta Armando enshrined its values in a Manifesto called "Pasta Armando, la Cura del Grano" ("Pasta Armando, Looking After Wheat"), featuring 5 points which outline the identity card of the brand and its commitments, as also underlined by its testimonial,

chef **Alessandro Borghese**, who has been the star of the company's commercials and all its communications for the last three years. This year, communications via television were aired until May, when we launched a new 30-second advertisement on the restart. In June, we began to distribute the new Pasta Armando pack called "zero pesticide residues and glyphosate method" and the launch was supported by a digital and sales point communication campaign. We are supported by the **Service plan** agencies for creativity and the **Media Plus** media centre in Milan, with which, in the coming months, we will begin television communications once more».

# DR. SCHÄR

GLUTEN-FREE MARKET LEADER IN EUROPE WITH A LONG HISTORY OF SUCCESS, COMBINING INNOVATION, RESEARCH, QUALITY AND NEW PRODUCTS FOR CONSUMERS AND LARGE-SCALE DISTRIBUTION

The success story of the **Dr. Schär** family business dates back to 1922, when **Doctor Anton Schär**, a doctor from Innsbruck in Austria, recognised the need to develop a line of gluten-free diet foods for children with gastrointestinal disorders. Initially, the products were suitable for children: high infant mortality and lack of hygiene put the health of children, who were often malnourished, at risk. Together with the entrepreneur **Gottfried Untertrifaller**, from Bolzano, he began selling these products, becoming a well-known brand in the post-war period. The turning point came in the '80s, when a merchant from Merano (founder and now chairman of the company), **Ulrich Ladurner**, sensed and perfected the potential

of the original idea, courageously investing in gluten-free nutrition: that was when Dr. Schär was born. Thanks to the help of expert collaborators, doctors and coeliac associations, it launched the first complete line of gluten-free products. Product quality and consumer-oriented service led to the fervour of the '90s, a period in which Dr. Schär established itself as the market leader in Italy and began an expansion of the business which continued in the 2000s in other European markets; those years also saw the construction of new production plants. The **R&D Centre** in Trieste, the hub of corporate innovation, was inaugurated in 2003. In 2010, the company underwent a major process of internationalisation.

## The company in figures

Name: **Dr. Schär**

Headquarters: **Postal (Merano)**

Production and distribution sites:

**18, in 11 countries**

Employees: **1,400**

Turnover in 2019: **375 million Euros**



Dr. Schär



Thanks to its consolidated expertise and a large assortment of tasty, high-quality products, today Dr. Schär is the market leader of gluten-free products in Europe, with a global turnover of 375 million Euros. 1,400 employees at its 18 production and distribution sites located in eleven countries work on the global market and to improve the lives of people with specific dietary needs. This year, Dr. Schär entered the organic sector with a selection of products that are all naturally gluten-free. Dr.

Schär is represented in large-scale distribution by the Schär brand, offering a very wide (about 115 shelf products) and diversified range of gluten-free products in the following categories: bread and bread substitutes, sweet and savoury snacks, pasta, pizza and first course dishes, flours and doughs, cereals and breaded products.



The first complete line of gluten-free products

## Cultivation and production

High quality production starts from the selection of ingredients: products are made using selected and controlled raw materials, without preservatives.



The most recent formulations include naturally gluten-free ingredients that are rich in fibres, proteins and other vital substances to increase their nutritional value and variety of flavours, combining taste and well-being.

The use of sourdough is preferred for natural leavening and “good” fats, such as Evo oil. It all starts with the initial selection of the seeds, at the R&D Centre in Trieste, then it’s up to Schär’s trusted farmers to cultivate their fields to the best of their ability. Schär agronomists and quality experts make sure that proper cultivation takes place and that raw

materials are shipped to the production facilities free of gluten or other allergen contamination. Each production phase is carefully monitored by a team of 40 employees to ensure the utmost safety.

The products placed on the market are subjected to total quality control: from the raw material to the finished product. The raw materials used must be naturally gluten-free, totally free of other allergens, heavy metals and micro-toxins. In addition, to ensure the utmost food safety, facilities have to meet the highest hygiene standards.

## SPECIAL QUALITIES

### The relationship with farmers

Dr. Schär considers farmers trusted partners. Schär has developed a network of selected farmers in Italy and other areas of Europe that carry out the controlled cultivation of gluten-free agricultural raw materials. The cultivation contract with these farmers spans from sowing to harvesting, right up to the delivery of raw materials to the mills, where desiccation, storage and grinding take place. Growers receive advice, know-how and regular visits from Schär agronomists to check the health of their plants and their crops, carry out measurements and take samples for analysis. Total and precise control of the supply chain is crucial to ensuring the traceability and transparency of the entire process, guaranteeing the safety of products from the fields, from production up to the final consumer.





**Ulrich Ladurner**  
Founder and chairperson

## “We are close to the territory”

«Our company was founded in South Tyrol, a crossroads of cultures that laid solid foundations to build a family-run business, but is part of a cosmopolitan environment rich in different cultural and linguistic stimuli, confirmed by the different nationalities of our collaborators, whose average age is 38.6 years old. The ties to our South Tyrolean homeland give the company authenticity».

## The gluten-free market in Italy: the trend by value sales and volume sales, by sales channel (YTD Jan 2020 vs YTD Jan 2019)

	Sales by value (in Euros)			Sales by volume (in kg)		
	YTD 27 Jan. 2019	YTD 26 Jan. 2020	% change	YTD 27 Jan. 2019	YTD 26 Jan. 2020	% change
<b>Total for Italy</b>	171,844,533.75	182,633,438.50	6,28	24,133,399.00	25,386,016.91	5,19
<b>Breakdown by format</b>						
<b>Hyper</b>	65,343,842.63	68,188,924.00	4.35	8,488,521.83	8,867,855.42	4,47
<b>Supermarkets</b>	72,675,023.75	79,117,743.75	8.87	9,374,944.63	10,059,022.44	7,30
<b>Free Services</b>	15,609,032.38	15,558,428.09	-0.32	2,169,619.51	2,170,016.63	0,02
<b>Discount stores</b>	18,177,690.91	19,723,951.50	8.51	4,097,383.85	4,285,613.84	4,59

Source: Nielsen Trade\*Mis



The new cereal crackers

The 9 products of the BIO line

### News Bio Schär

The **Schär BIO** line includes a selection of high quality organic products: nine products in the categories sweet bakery, savoury bakery and pasta which, in addition to excellent taste, contribute to the well-being of the body; the products contain a wide variety of naturally gluten-free ingredients and fine grains, such as semi-wholegrain rice, quinoa, buckwheat,

teff, oats and almonds, which are rich in beneficial substances, starting with fibres.

The products are packaged in packs made, where possible, using recycled and recyclable materials. The products are all gluten-free and, with the exception of biscuits, also lactose-free.

Another new product this year are the

**Crackers ai Cereali** (Cereal Crackers): tasty and crunchy puff pastries that are gluten- and lactose-free, containing flours rich in precious nutrients and fibres (wholemeal millet, brown rice, soy, buckwheat, sorghum, linseed and poppy seeds). They are naturally leavened with sourdough, which improves their texture, nutritional value and shelf life.

## Research and innovation



Dr. Schär makes large investments in Research & Development. The Dr. Schär R&D Centre in Trieste has overseen this area since 2003; a reference point for the entire group, the centre brings together researchers and managers, experts in food technologies who collaborate with Italian and international institutes, research centres and universities. The Research team works on long-term strategic projects to identify and study new raw materials with high nutritional qualities and new

agri-food technologies. The Development team develops innovative formulations every year to create increasingly improved products from a nutritional and organoleptic point of view. An important project is **Re-Cereal**, dedicated to the different cereal crops that are typical of the high mountains and aimed both at recouping and enhancing millet, oats, buckwheat and increasing their nutraceutical components and promoting their use in the food industry.



## Social responsibility

Dr. Schär adopts a fair and future-oriented approach towards its employees, its partners and above all towards consumers, strenuously pursuing the important mission of improving the lives of people with specific dietary needs. For Dr. Schär, the company's social responsibility begins with the well-being and physical and mental health of its employees: that is why it has launched initiatives aimed at stimulating a healthy lifestyle, based on proper nutrition and sporting

activities. For example, it chose to offer yoga and functional fitness courses and promotes the use of bicycles and e-bikes; it has built a headquarters which, in addition to having large open spaces, separated by glass, that overlook the wonderful surrounding nature, has large internal staircases to facilitate the physical activity of workers; it organises meetings with nutritionists during working hours, which are useful for learning the principles of a balanced diet. The company restaurant boasts a menu designed by nutritional experts and provides balanced dishes; in addition to numerous vegetarian solutions, one day a week there is a completely gluten-free menu for everyone.

## Communication

Schär supports its business with integrated communication tools, including the use of new touchpoints and increasingly in partnership with the distribution brands. All of which is reinforced by digital communication, which is continuous throughout the year and intensifies in specific periods. In particular, the company is very active on social networks, in contact with the communities of its core target, i.e. coeliac or gluten-sensitive people, with whom it shares educational content. Schär supports consumers through specific services, which facilitate their daily lives:

from consulting to ad hoc information tools, right up to listening to their needs to formulate new products. The company has also developed an app called "Schär on the go", which identifies shops and restaurants with gluten-free products, complete with reviews. Furthermore, packaging is also an important vehicle for communication and therefore has to have a certain visual impact, must inform and reassure today's consumers, who are increasingly careful about what they eat. This role encompassing experience, competence and qualified service contributes positively

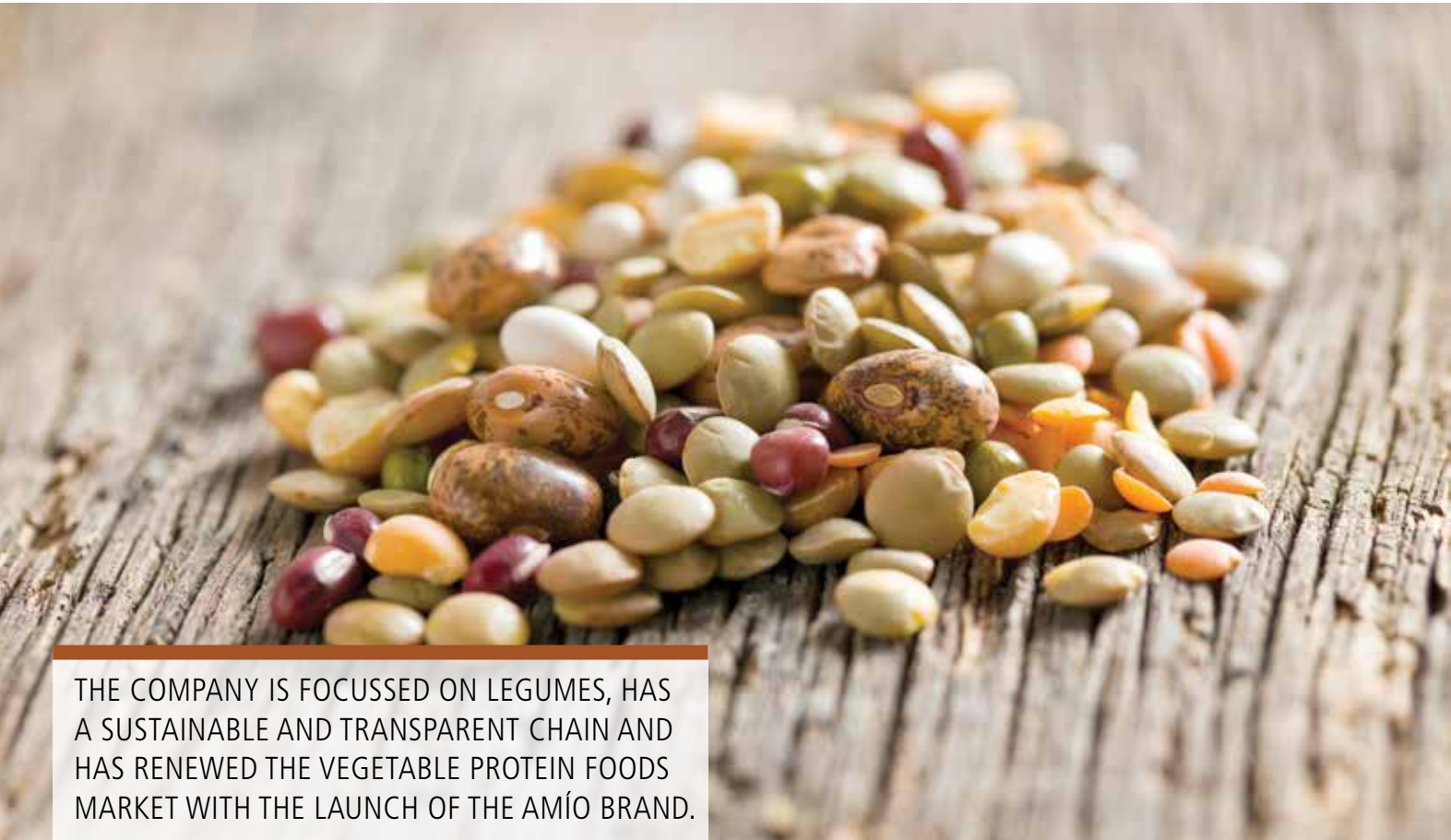


to consumer retention. Lastly, in order to demonstrate its attachment to the area and its support for sports, Dr. Schär sponsors sporting events such as the Lake Resia race in Val Venosta, the company's own race and the company football tournament held in Merano.

## DR. SCHÄR

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# ILTA ALIMENTARE



THE COMPANY IS FOCUSED ON LEGUMES, HAS A SUSTAINABLE AND TRANSPARENT CHAIN AND HAS RENEWED THE VEGETABLE PROTEIN FOODS MARKET WITH THE LAUNCH OF THE AMÍO BRAND.

**I**lta Alimentare is a company totally focussed on the legume market with an integrated supply chain, from the field to the table. Ilta carries out added value projects that focus on legumes, which represent the best choice of food in terms of sustainability and are the basis of a more equitable and accessible food culture.

The value around what, until yesterday, was a commodity is established by concepts such as the supply chain, transparency, choice of partners with which the company carries out projects (from agricultural producers to research institutions, such

as **Smartfood IEO**), right up to investment in research and development. The company has been operating in Venice since 2016 at the Marghera facility where, on the back of an important strategic decision, it launched **AMÍO**, a brand of dried legumes and cereals, whose current aim is to innovate the plant-based protein foods market and make AMÍO into a world-leading brand.

Ilta Alimentare SpA is 100% owned by **Ilta Commodities S.A.**, a Swiss holding based in Geneva, and represents the final phase of a journey into the agro-food sector that was commenced

## The company in figures

Name: **Ilta Alimentare Spa**

Headquarters and factory: **Venice**

Employees: **45**

Turnover in 2019: **37 million Euros**

Percentage of exports on turnover: **70%**

Sales of packaged product: **FDS 20%;**

**Large-scale distribution 80%**

Tonnes of legumes and cereals handled:  
**167,000 TONNES**

45 years ago by its founder,  
**Theodore Margellos.**

Ilta Alimentare operates at a 6000 sq.m plant in a strategic position in Europe.

## Dry product lines

The line of **AMÍO BIO di Filiera 100% Italiana** (AMÍO BIO 100% Italian supply chain) legumes and cereals is a line of organic products resulting from a 100% Italian supply chain pact: 10 organic products including legumes (lentils, chickpeas, beans and broad beans) and cereals (spelt and barley) from over 30 companies located in Basilicata, Friuli Venezia Giulia, Marche, Puglia, Sicily, Umbria and Veneto, which have joined the ILTA Alimentare Supply Chain project. Transparency, respect for nature, continuous crop control, CCPB certified responsibility and quality of the soil and products are the foundations of the production process.

On the front of each package there are the manufacturer's signature and a traceability code that can be entered on the [www.amiolegumi.it](http://www.amiolegumi.it) website to learn more about the farm and the methods of cultivation. The **ZuppamiXlegumi line** was born from a



collaboration with Smartfood, a Nutrition and Communication Science research programme promoted by **Fondazione IEO - CCM**, which has given rise to a line of mixes with legumes and cereals that are ideal for soups, in which excellent taste blends with a nutritionally balanced composition that is perfect for being prepared in the kitchen.

ZuppamiXlegumi products offer what nutritionists call a healthy dish, without sacrificing taste. Launched in 2018, the line now includes 5 products: ZuppamiXlegumi and Avena, ZuppamiXlegumi and Spelt, ZuppamiXlegumi and Buckwheat, ZuppamiXlegumi and Quinoa and ZuppamiXlegumi and Brown Rice.



### SPECIAL QUALITIES

The integrated biology supply chain

Ilta Alimentare's Filiera Biologica AMÍO BIO (AMÍO BIO Organic Supply Chain) project was born in 2017 with the aim of building a direct relationship between small Italian producers and consumers through the AMÍO brand, which guarantees the quality and transparency of the supply chain. *"From the hands of those who cultivate to people, always taking the shortest path"*: that is the project's promise of a short supply chain. The producers cultivate, collect and certify 100% Italian legumes and cereals, in compliance with organic practices. The raw materials are then delivered to the Ilta plant in Venice, where they are cleaned and packaged. Thanks to a precise process

of traceability and management of raw materials, consumers can find information on the producer in every AMÍO BIO product and learn more details by tracing the product to the field in a dedicated section of the [www.amiolegumi.it](http://www.amiolegumi.it) website. The Ilta supply chain has always been based on the *farm-to-fork* approach, on the protection of biodiversity and on organic farming practices. Ilta manages a volume of over 1000 tonnes of Italian organic products per year, of which over 800 are from the supply chain. The project will continue to grow in the coming years, in line with the company's development programmes in the organic sector.



**Fabrizio Cantoni**  
Commercial Director  
of Itta Alimentare Spa

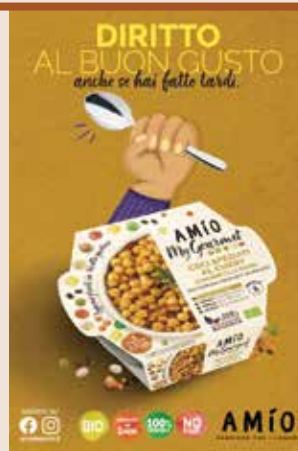
## “AMÍO: our mission is to launch innovative lines by monitoring trends”

«The Dry Division of the AMÍO brand offers 3 lines through the large-scale distribution channels; AMÍO BIO di Filiera 100% Italiana (AMÍO BIO 100% Italian supply chain), ZuppaMixLegumi and Cereali, and “Le Nostre Selezioni” (“Our Selections”) line. We are also partners in the production of MDD for major Italian and European groups. At the beginning of 2020, we launched the first of a series of lines from the Ambient Ready Meals Division. AMÍO My Gourmet is the beginning of a journey that aims to innovate a category that has not yet expressed its true potential in line with market trends. We take particular care of the product study phase in all its aspects. Our mission is to launch lines that contain elements of innovation to satisfy and, if possible, anticipate current and future market trends».

### Communication

The next AMÍO HOO campaign will take place from **24 September to 13 October 2020** and will be visible in the metropolitan area on billboards and Milanese bus shelters.

The iconic creativity that has given life to 3 different subjects, dedicated to each of the products, combines the dominant use of colours with elegant illustrated strokes and aspires to becoming an element of street furniture that is consistent with the perception of quality of the AMÍO brand. The campaign headline enhances the host



of opportunities for consumption. To support the brand, a marketing and communication strategy takes AMÍO consumers on a journey around the best

production areas in Italy and throughout the world. Information rich in content is available to consumers through the company’s website and social media.

### News

#### AMÍO My Gourmet

**My Gourmet** is AMÍO’s new “ready-to-eat” line, created to satisfy an emerging need for ready, healthy and tasty recipes by a target market that is increasingly demanding, even when consuming outside the home. The visual identity and the development of the packaging of this new line were designed to enhance the peculiarities of the legume-based product, which is 100% vegetable and organic (without preservatives, dyes and glutamate), starting with its name.

It is no coincidence that the line is called My Gourmet: they are ready meals, but they are tasty (gourmet), above all. Furthermore, the addition of the possessive pronoun “My” suggests a line that is very close to the consumer.

It is like saying: “I can take them with me”; the My Gourmet line, single-portion recipes in 270-gramme trays, without preservatives, can be kept outside the fridge thanks to high-temperature preparation and, thanks to a specific type of



packaging, it can easily be heated in a microwave oven. The first three AMÍO My Gourmet recipes available (two of which are gluten-free) are: “Legume and Oat Soup with Tomato”, “Mediterranean Lentils with Aromatic Herbs” and “Curry Spiced Chickpeas with Cranberries”.

## Vegetables and legumes: sector figures (2018/2019)

	2018	2019
<b>Production of vegetables, legumes and potatoes (in thousands of tonnes)</b>	13,095	13,448
> of which vegetables and legumes	11,780	12,109
<b>Value at industry base prices (in millions of Euros)</b>	7,230	6,940
> of which vegetables and legumes	6,621	6,174
<b>Processing industry turnover (in millions of Euros)</b>	8,815	8,900
<b>Incidence on agri-food turnover (% change)</b>	6.7	6.7
<b>Imports (in millions of Euros)</b>	807.8	975.6
<b>Exports (in millions of Euros)</b>	1,358	1,371
<b>Balance (in millions of Euros)</b>	666.4	545.8
<b>Average monthly household expenditure (in Euros)</b>	58.8	60.6

Source: Ismea

## Ready meals market: top 10 ready-to-eat

(% change in volume sales year-on-year, June 2019)

<b>Fruit-based sweet snacks</b>	+ 84.2%
<b>Ready-made first courses - Other types</b>	+ 56.7%
<b>Fresh-food other ready-made meals - Polenta</b>	+ 54.4%
<b>Other ready-made meals - Main courses</b>	+ 33.3%
<b>IV range fruit - Mixed</b>	+ 33.1%
<b>Ready-made first courses - Pasta salad</b>	+ 26.5%
<b>Other ready-made meals - Main courses</b>	+17.3%
<b>Dried fruit without shells - Mixed</b>	+17.2%
<b>IV range fruit - Single product</b>	+16.8%
<b>Dried fruit without shells - Nuts</b>	+16.2%

Source: Nomisma su dati Nielsen, Rapporto Coop 2019

**The increase in ready to eat** (food expenditure in hypermarkets and supermarkets, total in Italy, var. in % 2018-2011)



Source: Elaborations by the Ufficio Studi Ancc-Coop using Nielsen data



**Theodore Margellos**  
CEO of Ilta Alimentare

## “Strong and irreversible vegetable protein trend”

«The trend towards vegetable proteins will be strong and irreversible, motivated by the important benefits they are able to bring both on a nutritional and environmental level. The current trend towards less meat consumption and the greater consumption of vegetable protein foods, especially among the Millennial target market, cannot be considered a mere momentary trend. Throughout the world, food industries are developing numerous innovative plant-based products with the aim of imitating meat and fish. However, there are many other trends, which strongly influence consumer choices: natural products, certified organic products, full traceability right up to the table, authentic foods, ethnic and regional recipes, foods that provide a healthy and balanced style of eating. All these mega-trends are not reflected in what is known in jargon as the “fake meat” phenomenon.

For millennia, nature has offered us a vast choice of natural and tasty plant foods with high protein content, which are above all versatile and suitable for many use in many recipes in the kitchen. At the top of the list of these natural foods are legumes. For consumers, legumes can sometimes still be extremely difficult to use in recipes given current lifestyles: they require a lot of preparation time and, until now, the market has not adequately responded to this issue. Indeed, the world of legumes has seen very few attempts being made to produce ready-to-eat meals capable of completely satisfying consumers.

In many cases, ready-made products pay little attention to taste, often involving basic preparations that require further cooking and/or the addition of other ingredients, which may represent a limitation for consumers.

We at Ilta are working enthusiastically to bring true innovation to plant-based protein foods and make AMÍO a world-leading Made in Italy brand. AMÍO's new My Gourmet line responds to global mega-trends. It also takes up the challenge of the ready meals sector, providing an innovative solution, a satisfying experience and tasty recipes that do not require further actions by consumers».

**ILTA ALIMENTARE S.P.A.**

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