

Largo Consumo



The production chains

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

According to



LA TUA VERDURA SCEGLIE CONIP



LE NOSTRE CASSE IN PLASTICA SONO
100% RICICLATE E LO SONO
ALL'INFINITO

CONIP

consorzio nazionale imballaggi plastica

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SUMMARY

Production industries

According to



Amadori
Poultry Meat

p. 4



Asdomar
Canned Fish

p. 8



La Doria
Canned Tomatoes

p. 12



Pastificio Liguori
Pasta di Gragnano PGI

p. 16



Surgital
Fresh Frozen Pasta and Ready Meals

p. 20

Director: Armando Garosci

Advertising and communication: Alessandro Rosso and Daniele Shahdadian

Corporate communications by Maria Eva Virga

Graphics and layout: Raffaella Varotti

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Production Chains is:



Top-quality
industrial labels



Related
supply chain



Systems
and processes



Product
innovation



Certifications



Packaging



CSR as a
competitive factor



Markets
served



Management



Communication



Trade marketing

AMADORI



A LEADING GROUP IN THE ITALIAN AGRI-FOOD POULTRY MEAT SECTOR, WITH SIGNIFICANT INVESTMENTS TO DEVELOP ITS INTEGRATED AND CERTIFIED SUPPLY CHAIN.

The **Group's** history started in Romagna, in the 1930s, when the **Amadori family** began trading poultry and farm animals locally. In the 1950s, the Amadoris decided to implement an entire poultry meat supply chain, by building the first feed mill (1965), hatchery (1966), and slaughterhouse (1968) in Cesena. In **1969**, the **Company was officially founded** in **San Vittore di Cesena**.

Over the decades, the Company increased its production sites in Italy, and took over other companies in the field. Today, with its **+ 1.3 billion euros of turnover**, it is one of

the leaders of the Italian agri-food industry, specializing in the poultry sector.

The Group has made significant investments to keep up the growth and development of its **100% Italian integrated and certified supply chain**; behind its success, the capability of ensuring innovative production processes, with cutting-edge technologies and developing an accurate sustainability policy, both environmentally - to increase the production energy from renewable sources - and socially - by supporting the community it works in.

The company in figures

Company name: **Gruppo Amadori**
 Headquarters: **San Vittore di Cesena (FC)**
 Processing plants: **6**
 Distribution centres: **19**
 Logistics platforms: **3**
 Hatcheries: **5**
 Feed mills: **4 (plus 1 subcontracted)**
 Holdings: **over 800**
 (owned and partner facilities)
 Employees: **over 8,500**
 2019 turnover: **over 1.3 billion euro**



Integrated supply chain

Amadori manages directly the entire chain all over Italy to ensure the ingredients origins, control over every step of the production cycle, and top product safety, from manufacturing to distribution to end customers. In the **feed mills**, expert nutritionists study the ideal diet - with wheat, barley, soy and mineral salts - and prepare the feed to ensure the animals' growth. The **breeding holdings**, located in protected areas, house the roosters and hens that lay the eggs destined for the supply chain's **hatcheries**; here, the fertilised eggs develop and hatch, under constant monitoring of the humidity, temperature and ventilation parameters, in compliance with strict health and hygiene standards.



In the holdings - organized to ensure the best environmental conditions - the animals are free to move around, and, for the **Il Campese** and **BIO** supply chain, even outdoors. All **food-processing plants** are certified to Standard ISO 9001 and equipped with cutting-edge technologies. Lastly, **distribution**: thanks to an advanced logistic system, almost all deliveries are made within 24 hours after the order has been received, thus preserving the products' shelf life.

New communication for "Il Campese"

The new advertising campaign for Amadori's **Il Campese - the free-range and antibiotic-free chicken**, fed only with plant-based no-GMO feed - started airing at the end of February, on all the main Italian TV networks. The new ad was made by **VMLY&R** and produced by **Movie Magic**; in it, a specimen of **Il Campese** tells its mission: bringing excellence and quality in the homes of all Italians, and showing "its reign: a free-range

holding from Amadori's excellent supply chain, included in a unique territory, such as the **Tavoliere delle Puglie**, where almost all the poultry holdings are based. The **TV campaign** - 30" and 15" videos - is flanked by a **digital planning** and **social media communications**; in addition, a renewed section of the website - **www.amadori.it** - is devoted to **Il Campese**.



SPECIAL FEATURES

The link between well-being, nutrition and sports



"**Amadori alimenta lo Sport**" is Amadori's project where it acts as reference speaker for anyone who combines an **active lifestyle** to a **healthy and balanced diet**. The Group becomes "**ambassador**" of **high-quality Italian white meat**, thanks to the differentiating

pluses of its top-quality supply chains: **Qualità 10+**, **Il Campese**, **BIO**. The project started in 2019, with the partnership with **CONI** and **Italia Team**, which sees Amadori as official supplier of the Olympic Training Centres and **Casa Italia** at the Tokyo's **Olympics**.

Amadori's offer promptly meets the nutritional needs of any **kind of athlete** (professionals and enthusiasts alike), **children**, future and new **mums** and **seniors**, for whom high-quality white meat proteins are irreplaceable for a complete and balanced food regimen. The "**Amadori Alimenta lo Sport**" project is continuing with the partnership with sports institutions (such as the **Federazione italiana Fitness**), with ambassadors from the world of sports, nutrition and lifestyle (like the two Olympic athletes **Alice Volpi** and **Marco Lodadio**), and the participation to important events dedicated to health and well-being.



Francesco Berti
Amadori's CEO

“A business made of respect and balance”

«Integrated supply chain does not only mean 100% Italian quality: our business is included in a local community context we want to be part of. This is why we chose a business model that can reconcile our corporate goals with social and environmental objectives, in a perspective of transparency and consistency. Respect and balance guide Amadori's corporate responsibility, which involves the entire integrated supply chain and finds us committed toward **people** - our employees, consumers and communities - **animals** - to ensure their care and attention, every step of the way - and the **environment**. Moreover, here at Amadori, we continue to innovate our production processes with the aim of meeting all reference targets, through high-quality lines (Il Campese, BIO and Qualità 10+) and a versatile and diversified offer. We firmly believe in developing our sector, with a view to modernity, efficiency, innovation, quality and sustainability. **Our 100% Italian integrated and certified supply chain is the beacon of our investments**, aimed at increasing our quality to showcase ourselves as a leading company in this sector».

The product portfolio

Amadori presents itself as a reference company in the poultry sector for its quality and differentiated offers, with over 1,500 items, from traditional cuts to processed and cooked products. The crown jewel is **Il Campese**, a certified free-range, antibiotic-free and slow-growing chicken, fed with 100% Italian plant-based no-GMO feed with certified traceability, processed only energy from renewable sources.

The Qualità 10+ chicken and turkey supply chain comprises 100% Italian antibiotic-free animals, fed with plant-based no-GMO feed. Lastly, **the BIO supply chain** comprises 100% Italian chicken from Amadori organic farming supply chains, where animals can move around freely outdoors, and are fed with organic grains and legumes.



Controlled and guaranteed quality

In 2020, Amadori employed:

- **54 Quality Assurance operators** in the supply chain and in the analysis labs
- **9 in-house veterinarians**
- **51 holding technicians** supervising the livestock area
- **2 nutritionists** in charge of feed formulations and diet plan development



News

Traditional products

“Il Campese” packaged range

- designed to meet the needs of modern consumers - is sold in

fixed-weight LID packages, a technology that, apart from ensuring the ideal fresh product conservation, features a premium look, with greater clarity of presentation in the refrigerated sections.

These new products are characterized by a **high service content**, and are ready to be easily cooked and enjoyed.

They include **innovative cuts with limited weights**, designed according to modern family purchasing choices.

In addition, the label image was also renewed in order to communicate the many pluses of “Il Campese” with greater strength and distinctiveness.



Over 578K microbiological, serological, chemical, molecular biology and diagnostics analyses were carried out by their in-house labs in one year.

Over 105K analyses were carried out on finished products by in-house labs in one year.

Investments in technologies

The Group constantly invests on the entire integrated supply chain. Some of the most recent investments include, in the animal feeding area, improvements to the Central-Southern Italy supply chain, with a **new hatchery** in Bojano (CB), Molise, and a **new feed mill** in Fossacesia (CH), Abruzzo. Concerning the food processing phase, the **“Cutting Room”** in the main plant, Cesena (one of the most innovative plants in Europe, dedicated to the first



and second poultry processing stages) is now being flanked by important investments in other sites, to strengthen all product lines, especially those dedicated to **high service content** products.

Concerning the distribution efficiency, the construction of the new logistic hub in the main Cesena plant - a cutting edge structure - is proceeding at full speed.



Environmental sustainability

For quite some time now, Amadori has devoted great attention to an **environmental and energy management** of its activities.

Over the years, it installed plants with an overall nominal power of over 25 MW to produce part of the energy consumed: photovoltaic plants on the roofs of their holdings and plants; combined heat and power plants fuelled with biogas, natural gas or vegetable oil in several sites of the supply chain.

Overall, the Group self-produces about 30% of the energy it employs. And this percentage rises to 80% for the main

Cesena plant, which features a thermal plant connected to two natural gas combined heat and power plants, an anaerobic biogas recovery, an active sludge biological purification system, and a rendering plant for by-product transformation. Another positive example is Il Campese chicken processing, in Mosciano S. Angelo (TE), which employs **100% renewable energy**.

Concerning the use of water resources, wherever possible, water recycled from the purification plants is employed,

through drinking water treatment plants where all surface water is treated, and up to 70% of it is employed for plant requirements. Lastly, with a view to **circular economy**, thanks to modern by-products processing plants in Cesena and Mosciano S. Angelo, they become pet food ingredients. In addition, grease is certified as biofuel, while poultry manure is used for fertilization and sold to third parties for energy production.

One of the next investments is the new rendering plant at the Mosciano S. Angelo plant.



ASDOMAR

TODAY, GENERALE CONSERVE, UNDER THE 'ASDOMAR' BRAND, AND PRODUCTION OF IMPORTANT PRIVATE LABELS, IS THE SECOND ITALIAN MANUFACTURER OF CANNED FISH, AND THE FIRST ITALIAN MANUFACTURER OF CANNED TUNA FROM WHOLE FISH



The **ASDOMAR** brand was established in the 1940s; however, the distribution company was born at the end of the 1980s.

Over the last decades, the Company went from being a small enterprise to a production and trade company with over 644 employees - divided between the Genoa administrative site and the plants in Sardinia (Olbia) and Portugal (Vial do Conde) - which ended 2020 with a 159 million euro turnover. 60% of the turnover is given by their own brands, and the remaining 40% by Private Labels.

The company in figures

Administrative
and Operating Headquarters: **Genoa**
Production sites: **2 (Italy and Portugal)**
2020 turnover: **over 159 billion euro**
Employees: **645**

Production

In the years of extreme relocation in Italy, ASDOMAR was one of the very few enterprises to increase their production in the Country, thanks to the acquisition, in 2008, of the machineries and systems of a tuna processing plant based in Olbia. Then, the Company built a new plant in 2010. The Olbia plant employs 220 people on average, while the Portugal branch around 401. Since 2010, the Portuguese plant has

been permanently acquired, and Generale Conserve produces mackerel and salmon there, and, since 2016, also skipjack.

The high percentage of women employed in both plants (for a total of 82% women and 18% men on average) bears witness to the importance of women's labour in tuna and mackerel processing, which is carried out manually by experts cutting, cleaning and preparation craftswomen.



Markets and channels

Generale Conserve reached important trade goals: including the authorization to sell in the USA, Brazil and Australia. Their internationalization strategy appeals to the company's most historical asset and main driver: the ASDOMAR brand. In Italy, in the canned tuna market, ASDOMAR value is around 6.5%, while Generale Conserve is around 16% (data updated to 2020). The Company has commercial relationships with over 200 Wholesale Players.



SPECIAL FEATURES

“Zero-waste” tuna

The efficiency of the production process optimizes the use of ingredients, and a fish flour production plant (for animal husbandry) allows ASDOMAR to produce tuna without processing scraps: “Zero-waste” tuna.

The tuna industry generates over 50% of scraps on average, which are generally disposed of.

Generale Conserve recycles 100% of these scraps to produce animal husbandry feeds, thus creating a circular economy value. In addition, tuna cooking stocks are filtered to retrieve the parts with high protein content to enrich the fish flours. Part of the fish stocks are also extracted and added to produce the vitamin-enriched gel added to pet wet food.



Poster



Giovanni Battista Valsecchi
 Generale Conserve's CEO

“Innovation and Automation”

«Generale Conserve continues to invest in Research & Development and industrial innovation, both at the Olbia plant and at the Vila do Conde branch. The goals pursued with such investments concern: production capacity efficiency, by-products valorisation, production flexibility, diversified production and global process safety. The projects are designed and implemented so as to combine production performance, product quality and employee safety.

Improving the technical yield and productivity, and the ability to meet consumers' trends and consumption styles: these are the strengths of the Company's competitiveness.

The Company continuously invests in technology, to maximize efficiency and innovation: the result of this is the best balance possible between advanced technologies and traditional manufacturing know-how - essential in key production phases. Currently, short-term goals include investments and works to update the compressed air system, in order to achieve energy savings and ensure increased efficiency, to face the daily production peaks».

Quality and sustainability

Generale Conserve combines its search for top quality to a strict and proactive commitment to preserve its workers' health and to sustainability. Valorising local craftsmanship is one of the main pillars of the Company.

Keeping yellowfin tuna production in Italy, and mackerel and skipjack production in Portugal helps support local territories and economy.

Sustainability is the corporate ethics' beating heart, and it constantly translates into concrete actions to improve industrial and production processes and to preserve the fishery resources.

Speaking of sustainable fishing, the ingredients used are guaranteed by **Friend of the Sea (FOS)**, an international certification program



stemmed from the success and tangible results obtained by the results of the **Dolphin-Safe** project by international NGO **Earth Island Institute**.

According to **FAO** guidelines on fish products, FOS defined very strict certification criteria: the tuna used is accepted only if coming from suitable fishing areas, if compliant with the strict long-term fish stock (population)

sustainability certification criteria, and if fished with selective methods with no impact on the seabed.

Maximum transparency also on the package labels, which indicate species, fishing method, ocean, FAO area, and the option of requesting complete traceability, through the website.

Last but not least, ASDOMAR products packaging materials are 100% recyclable.

IPER + SUPER + LS TOT. ITALY

YEAR 2020	Sales value	Var. %	Sales volume	Var. %
Canned tuna with oil up to 300 g	892.848.232	+6,2	76.525.427	+5,2
Total Medium Oil Tuna	744.772.452	+6,0	69.497.202	+5,2
Total Premium Oil Tuna	148.075.765	+7,0	7.028.226	+5,6
<i>Of which Fillets in Glass jar</i>	122.459.153	+8,8	5.858.112	+7,2

Source:
 IRI End Year
 27/12/2020 Tuna
 Market Overview

News

New formats for a wider selection

In the last years, great significance was given to the size range expansion and to waste reduction, also by favouring the need of different size formats, from single-servings to family formats. Smaller tuna fillets formats (105 g and 250 g, in servings) were designed to prevent food waste and to meet the new lifestyle choices. The news for 2020 was the new 150 g variant of EVO oil tuna, which flanks the classic oil and natural formats, and the



grilled version with oil, in the same format. The «Meno Olio» EVO oil tuna range complements the standard range, and offers all of ASDOMAR'S quality, with less oil. The new formats will contain the same quantity of tuna as the standard can, and they won't have to be drained before enjoying them.

Food safety

Food safety and health are guaranteed by constant lab analyses, real-time results and immediate feedback from the production dept. The Olbia plant analysis lab is certified by **Accredia** (Italian accreditation institution) as independent third party, and this highlights the lab's very high level of technical skills and compliance to the highest reference standards. Analysis on the main production items are carried out on a day-to-day basis, such as 5,000 in-house

analyses per month to assess tuna and oil quality (in particular, 200 tests/day of histamine, mercury, chlorides, total volatile basic nitrogen and centesimal analyses). On average, over 11,000 sample tests were carried out in Olbia, on every tuna batch supplied, and 35,000 checks on finished tuna products; and over 1,000 sample tests on every skipjack, mackerel and salmon batch supplied in Vila do Conde (2019 data).



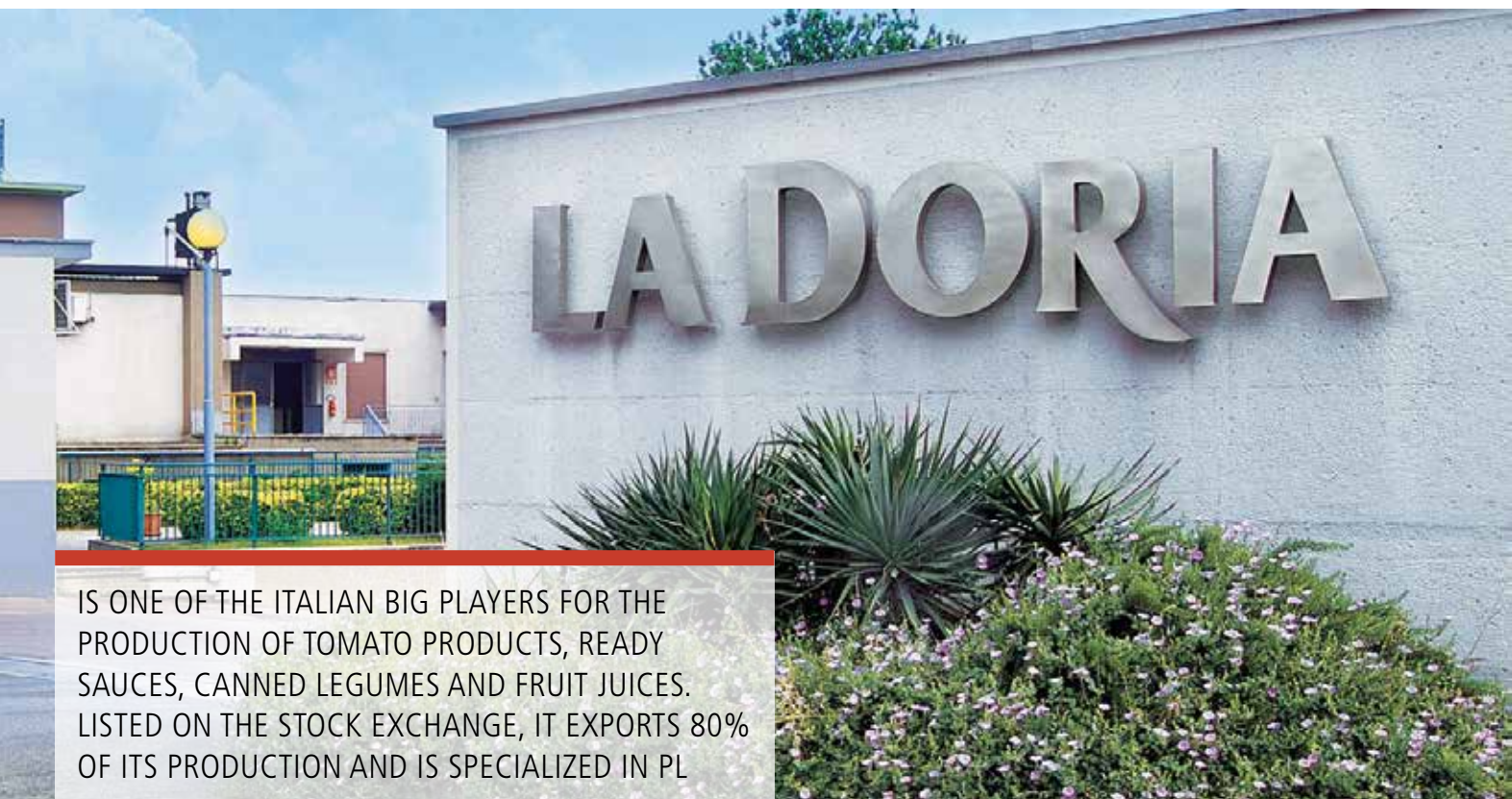
Recognitions

In April 2020, Generale Conserve was awarded with the **Premio Speciale BBS - Biblioteca Bilancio Sociale** award in the "Environment" category, especially for its projects related to production supplies for everyone's benefit, its use of marine resources as collective assets, and the achievement of the "zero processing waste" goal. ASDOMAR tuna ranked first in the latest ranking (last updated in 2016) by **Greenpeace "Il Rompiscatole"** - the only brand in the green zone - on tuna sustainability, and also in Greenpeace's label transparency survey (the only brand with only positive marks).

GENERALE CONSERVE SPA

P.zza Borgo Pila 39 - 16129 Genova, Italy - www.asdomar.it

LA DORIA



IS ONE OF THE ITALIAN BIG PLAYERS FOR THE PRODUCTION OF TOMATO PRODUCTS, READY SAUCES, CANNED LEGUMES AND FRUIT JUICES. LISTED ON THE STOCK EXCHANGE, IT EXPORTS 80% OF ITS PRODUCTION AND IS SPECIALIZED IN PL

La Doria - headquarters in Angri (Salerno), listed on the Stock Exchange - is a leading Italian group active in the plant-based canned products - and in the production of tomato products, ready sauces, canned legumes, and fruit juices and beverages in particular. La Doria is a second-generation family



business, founded in 1954 by the **Ferraioli Family** - which holds 63% of the share capital, with a 37% free float. In 2020, La Doria registered a consolidated turnover of 848.1 million euro, with 820 employees with long-term contracts. La Doria has been listed for the first time in the ordinary segment of the Italian Stock Exchange in 1995, and then in the Star segment, dedicated to companies that comply with exceptional standards of communication transparency, liquidity and corporate governance. In 2018, the Group launched a 138 million euro investment plan, aimed at increasing their production capacity, achieving industrial and logistic optimization and reducing costs. In the last 10 years, it invested resources for 235.3 million euro.

The company in figures

Year of foundation: **1954**

2020 consolidated turnover:

848.1 million euro

PL value: **97%**

2020 Export Value: **over 80%**

Production sites: **6 (in Italy)**

Overall extension: **792,000 sq.m.**

(of which indoors): **307,000 sq.m.**

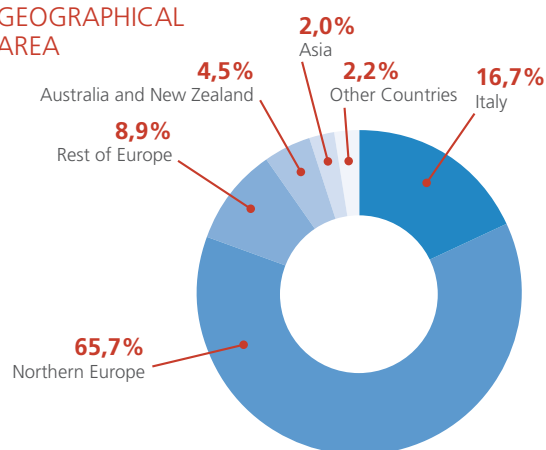
Employees: **820 employees with long-term contracts (approx. 900 seasonal employees)**

Markets and channels

Today, La Doria is the main European manufacturer of canned legumes, peeled tomatoes and tomato pulp in the retail sector, the first European manufacturer of ready sauces, and one of the main Italian manufacturers of fruit juices and beverages. The Company can boast a leading position in very competitive markets, such as the UK, Australia and Japan. It ranks first in the English market for the production of tomato products and baked beans with private labels.

Its strong international character is confirmed by the fact that its revenues from sales is generated for 80% abroad: in particular, 65.7% in Northern Europe (mainly UK and Scandinavian Countries), which is the main catchment area for the Group.

TURNOVER DIVISION BY GEOGRAPHICAL AREA



Source: company data

STRENGTHS

- High quality products at competitive prices
- Strong industrial efficiency that allows it to have highly competitive costs, also thanks to top process technologies, scale economies, optimal use of its production capacity and vertical integration with in-house production of tin-plate cans;
- High volumes that meet the requirements of leading Modern Distribution players;
- Wide and diversified range;
- Private label offer segmented for all three levels: value / entry level, brand logo /mainstream and premium;
- Constant product innovation for private labels, in line with new consumer trends and brand industry innovations;
- High flexibility in recipe, packaging and service customization;
- Specialist know-how in the production of Retail branded products, which led to the development of consolidated long-term relationships with leading GOD players;
- Sustainable business model



SPECIAL FEATURES

Private labels specialization

Preferred supplier of the major GOD and Hard-Discount chains worldwide, La Doria Group is mainly devoted to “private label” production for large Retailers’ brands: approx. 97% of their turnover

is achieved in this channel.

The Company’s mission is providing excellent quality products at highly competitive prices as brand alternatives.



Stefano Grieco
Quality & Product
Development Director

“100% Italian, traced and sustainable tomatoes”

«Through our close relationships and constant confrontation with farmers - which become actual partners - La Doria manages to follow all tomato cultivation phases, from seeding to transplant, whilst ensuring process quality and sustainability. La Doria follows vegetable growth, also by providing farming consultancy services and specific training sessions to farmers, on topics such as how to use pesticides responsibly, and only when strictly necessary.

Farming’s environmental and ethical sustainability is pursued also by activating specific training projects involving the farming industry on important matters, such as reducing water consumption or increasing the number of bees, which are essential for pollination.

Only the best varieties of non-GMO tomatoes are selected, and, thanks to the geographic proximity between fields and plants, they are processed right after being picked, to preserve their nutritional value. Freshly picked tomatoes reach our Anгри (SA), Sarno (SA), Fisciano (SA) and Lavello (PZ) plants, where they are subjected to further quality checks, before being processed with the most modern production and quality assurance techniques. Checks along the supply chain ensure that the products are fully traceable, from fields to shelves, and vice versa».



Production

A story revolving around tomatoes

La Doria is a European leader in the production of peeled tomatoes and tomato pulp, and one of the main Italian manufacturers of tomato products in the retail sector. In order to achieve these results, the Company has been working for over 60 years in close contact with farmers, with whom it has established actual partnerships with constant support and engagement.

This direct contact allows the Company to purchase the best 100% Italian tomato varieties every year, which -

thanks to the close proximity to the fields - are processed as soon as they are collected.

Traceability and sustainability are essential qualities for La Doria, when manufacturing its products; the Company guarantees its commitment to its customers through several certifications, such as the **ISO 22005** certification, which proves La Doria’s transparency to the market, thanks to the ability to rapidly trace the story of the certified product at any time. **Friend of the Earth** certifies La Doria’s

commitment to protect and safeguard the entire ecosystem, by avoiding the use of hazardous substances, managing waste and energy responsibly, and their corporate responsibility policies on the entire supply chain.

Four out of the Group’s plants - located in Anгри (SA), Sarno (SA), Fisciano (SA) and Lavello (PZ) - produce tomato products, for a total capacity of 283,000 tons of canned tomato products. The other two production plants are located in Parma and Faenza (RA).

Sustainability

Pursuing growth while respecting inalienable values permeating the Company's operations, integrated in every link of the Group's value chain: from ingredient supply to product manufacturing.

To La Doria, sustainability means first and foremost **EARTH**, the most important resource. La Doria manages to recycle 98.9% of its production waste. **COMMITMENT**, La Doria strives to be a solid and responsible company, for a long-term vision, trying to ensure safe working conditions, mitigate its impact, and generate shared value.

It is committed toward everyone that works with it, not just inside the company, but also toward external players, from farmers to customers. Through such commitment, it manages to meet 99.1% of its tin-plate can requirements by self-producing them,

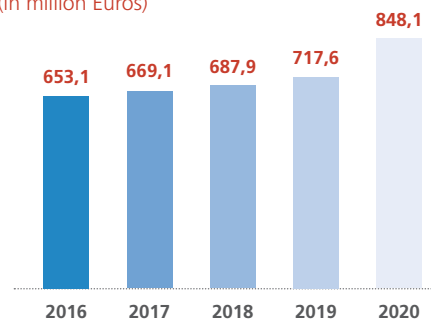


thus limiting the transport-related environmental impact; **PASSION:** **La Doria** wants our Italian tradition to be appreciated, and stand out for its quality and excellence.

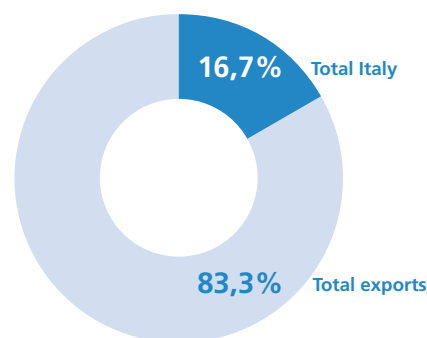
Passion is essential to work in the right way, and improve the quality of the entire corporate system. In 2020, the Company developed 124 new product development projects for its customers, by improving existing recipes or creating new ones, and combining flexibility, production efficiency and low environmental impact.

CONSOLIDATED REVENUE PROGRESS

(in million Euros)



2020 TURNOVER ALLOCATION (%)



Source: company data



Giuseppe Tamaro
Commercial Director Italy

“Innovation for Development”

«La Doria - also through its 'Discovery Team' focused on innovation and modern experimental cooking techniques - can replicate process and product technologies, and provide a prototype in line with the products to be manufactured to its customers. To us, innovation has two main directions: creating new product lines, and adapting the existing ones to new market trends; making plants more efficient, by innovating the production processes.

We are private label manufacturers, and product innovation cannot ignore a close partnership with our customers. Despite all this, we are always focused on new market trends and consumers' expectations, and on offering product and process news to our customers and business partners. With an eye to product innovation, we've been particularly focused on packaging, to meet the growing demand for sustainable products with reduced energy/environmental impact, by exploring new materials and new application technologies.

An example of this is the project of tomato multipacks reconversion from plastic to carton. For fruit juice boxes, we switched to Tetra Crystal packaging, which contains less plastic and has a lower environmental impact. Concerning process innovation, we focus on production optimization and environmental impact mitigation interventions».

La Doria SpA

via Nazionale 320, 84012 Angri (SA) Italy - Ph. +39 081 5166 111

www.gruppoladoria.it - commerciale.italia@gruppoladoria.it

PASTIFICIO LIGUORI

THE FIRST INDUSTRIAL PASTA FACTORY TO OBTAIN THE PASTA DI GRAGNANO PGI CERTIFICATION. LIGUORI IS SYNONYMOUS WITH MADE IN ITALY AND TOP QUALITY



PASTIFICIO
LIGUORI
1795



The company in figures

Company name: **Pastificio Liguori**

Headquarters: **Gragnano (Na)**

Production sites: **2**

Plant area: **30,000 sq.m.**

2020 turnover: **66 million euro**

Production lines: **6**

Annual production capacity: **100,000 tons**

Pastificio Liguori's origins date back over 200 years ago. In 1795, **Gaetano Liguori** obtained from Gragnano's Municipal Council the authorization to «produce and sell good quality maccheroni with a unique shape» and created one of the most ancient pasta production companies in Italy and worldwide. In 1820, his son, **Vincenzo Liguori**, founded Pastificio Liguori in the historical headquarters in Via Roma, Gragnano, using the first manual machineries to produce greater pasta quantities, in order to meet the increasing product demand. Already active in the trade of grain and related products, the **Casillo family** has not been guiding Pastificio Liguori for two generations. In 2013, the European Commission

awarded the PGI Certification to the Pasta di Gragnano. Pastificio Liguori is the first industrial pasta factory in the world to obtain this certification, and one of the founding partners of the **Consorzio di Tutela della Pasta di Gragnano IGP**. In 2019, Liguori acquired the majority shares of **Pastificio della Forma Srl**, right near Pastificio Liguori and dedicated to the production of very-slow-dry pasta in static cells. Today, Liguori is synonym with 100% Made-in-Italy top-quality pasta, with 8 ranges and over 100 formats, and a well-established supplier of private labels for major retailers in Italy and worldwide. The 2020 turnover was 66 million euro, 27% more than the previous year, with a constant growth since 2017.

Production

With a total surface of 30,000 square meters, the pasta factory works continuously on 6 production lines (4 short pasta formats and 2 long ones), with an annual capacity of 100K tons.

Between 2015 and 2019, a new short and long production line, new recyclable packaging lines and a three-generation plant were installed. In addition, an additional 10K square meters adjacent to the company have been acquired, to create a completely-automatic warehouse for finished products. Lastly, a silo and a new packaging line for special industrial formats were installed.



Brand evolution

Three years ago, a significant packaging rebranding and renewal process was carried out. The historical 1950s logo, with its institutional colours - white and blue - was found and reused.

The choice of such a radical rebranding stemmed from the need to enhance the pasta factory's identity and the product quality. Pastificio Liguori has been on the market for over two centuries, during which the art of "pasta making" has been passed down from generation to generation, and this unique feature had to be conveyed through the packaging.

In addition, the Company wants to use 100% recyclable packaging, to promote the essential and virtuous home recycling practice.

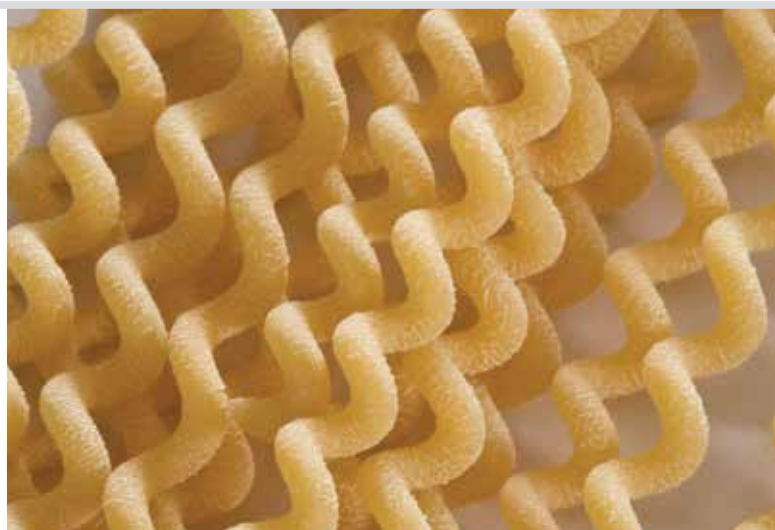
SPECIAL FEATURES

The pasta making process

Pastificio Liguori has always employed top quality ingredients, leading to a unique and excellent end product. This result can be reached only through a non-invasive ingredient transformation that prevents any damage. The flour used contains a high quantity of proteins, which, during the kneading and drawing phase, are structured to form gluten. A protein-based compound made by a dense and narrow mesh, within which the starch fragments are trapped. This chemical structure is responsible for the product's cooking resistance, patination and consistency.

Then, a slow and low-temperature drying process prevents any stress to the product, its texture - created during the kneading phase - from being altered, and preserves the typical organoleptic characteristics of the best Italian durum wheat: the typical straw yellow colour, scent and flavour.

Pastificio Liguori drying times exceed 18 hours for long pasta formats, at a temperature lower than 72 C°. While short pasta formats can be dried for up to 10 hours.



The Pasta di Gragnano PGI production specifications entail the exclusive use of bronze dies, which make the product surface porous to hold condiments to perfection. One of the main characteristics of the kneading method is the water used - spring water from the Monti Lattari Regional Park - at spring temperature, which is filled with minerals and has an optimal hardness that makes the dough texture ideal.



Aurora Casillo
Pastificio Liguori's
General Manager

“Total guarantee for end consumers”

«Liguori pasta has many of the latest market trends, which we have been offering for over a decade, now. Pasta Liguori is a Pasta di Gragnano PGI, made with 100% Italian wheat from certified supply chains, cultivated in Tavoliere delle Puglie fields. In addition, our pasta has a 14.5% protein content. We stand out for our production process - and our slow low-temperature drying in particular - and because we package our product in a premium sustainable package made of 100% recyclable paper (Aticelca 501 certified).

Our choices are the results of a basic ethical policy that we always implemented: our aim is valorising our territory and the fine products our Country has to offer, including durum wheat.

The wheat we select in Southern Italy fields has a unique flavour, aroma, colour and strength, and we comply with these quality characteristics during our production process, and during low-temperature drying processes in particular. This peculiar method has always been one of our marks, passed down for centuries by our master pasta makers, and essential to ensure an excellent 'al dente' pasta texture. To us, ethics means promoting the work of Italian farmers, by establishing a minimum fixed price, and premiums based on the wheat quality».

Markets and channels

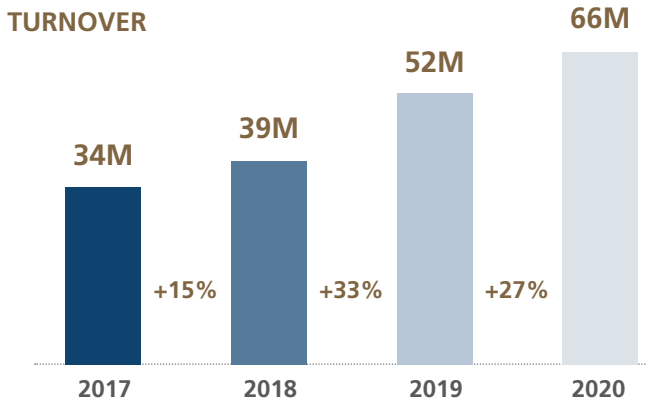
Pastificio Liguori's turnover is generated 50% in Italy and 50% abroad, where the Company distributes its products in over 40 Countries, both in the retail and in the Horeca channel.

Since 2013, it is the top Pasta di Gragnano PGI distributor. One of Liguori's historical market is Asia - where it has been present for over 30 years - and Japan in particular, where the brand is recognized for its high quality. The products are evenly distributed in all European Countries, where their premium quality and recyclable paper packaging are deemed essential.

Lastly, it is the only supplier of durum wheat dry pasta for one of the main food importing companies in the US, it is present Russia, UAE and even Australia, and is present in South America and soon also in Canada and in African developed markets.

Pastificio Liguori's turnover trends: 2017 - 2020

(in mln euro and % var. year after year)



Source: company data





Quality certifications

Pastificio Liguori has obtained the ISO 22005 certification for the Supply Chain Traceability Management System from Dnv-GI. This means that its quality and safety are monitored in the entire food supply chain. In addition, it documents its products' history and origins with the utmost transparency,

by identifying all responsible parties, from the field, in the production process and up to supermarket shelves. Indeed, you can trace back the "history" of a single pasta pack at any time. The 22005 certification is renewed year after year, starting from the agreements with the farmers, and passing through the Company's mills. Based on the quantity of end products foreseen year after year, the quantity of wheat collected is established at the sowing stage.

The type of wheat selected depends on the year, based on the seed quality and quantity.

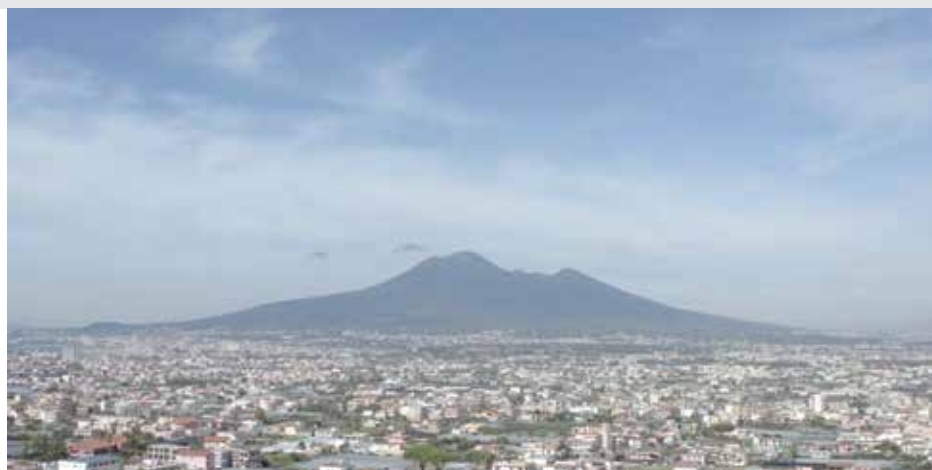
Then, the wheat is conveyed through the storage centres (mills) and transformed into flour during the year. When the flour reaches the structure, it is thoroughly checked and evaluated. Based on the Pasta di Gragnano IGP ingredients specifications, the protein content must be higher than 13%, and the ash content lower than 0.86%.

Liguori's strengths go well beyond the PGI specifications: its 100% Italian origins, supported by traceability certifications; a protein content higher than 14%; and an ash content lower than 0.84%. Lastly, also the wheat colour, gluten index and strength are assessed.

Investments in sustainability

The 23 million-euro 2015-2019 investment plan also included the installation of a three-generation plant to recover the energy and re-introduce it in the company, which led to a 21% reduction in greenhouse gas emissions. Pastificio Liguori's main goal is protecting the environment; the Company is constantly committed on eco-sustainable matters, which guide every process.

30 million euros will be invested between 2021 and 2024, with the main goals being: a further reduction of the Company's environmental impact and an



enhancement of the product quality. A further 30% reduction of fossil fuels and of water usage is also expected. In addition, from a structural and plant standpoint, the Company will implement new production lines, by investing in

the development of higher qualitative standards. All the efforts will be focused on low-temperature slow drying production methods, which is a staple of the pasta factory.

Pastificio Liguori Spa

Via dei Pastai, 50 - 80054 Gragnano (NA) Italy - www.pastaliguori.com

SURGITAL



ITALIAN LEADING COMPANY IN THE PRODUCTION OF FROZEN FRESH PASTA, SURGITAL BROUGHT THE QUALITY OF ITS READY MEALS AND SAUCES FROM FOOD SERVICE TO MASS DISTRIBUTION

Surgital factory Lavezzola

The company in figures

Surgital is the top Italian manufacturer of frozen fresh pasta, ready meals and sauce nuggets for restaurants, catering and cafeterias. Founded in 1980, the Company is based in Lavezzola (RA) and is guided by **Romana Tamburini** (President) and her husband **Edoardo Bacchini**

(CEO). Along with their children, **Massimiliano, Elena** and **Enrica**. Surgital is the Surgital Group parent company, and it includes **Surgital France sarl, Surgital America Inc., Ca' Pelletti Retail srl**. Surgital's turnover is 86.5 million euro. It entered the large-scale retail channels in 2019.

Name: **SURGITAL**
Headquarters and production plant: **Lavezzola (RA)**
Branches: **2 (France and USA)**
Employees: **340**
2019 Group's Turnover: **86.5 million euro**

Production

Born as a small artisan workshop, Surgital managed to bring the genuineness of its product to an industrial scale, by coming at 135 tons of fresh pasta, 60,000 single-serving ready meals and 8 tons of sauce nuggets produced every day, with the help of over 340 employees. Special attention is devoted to the preservation process, through 'cold technology' only: products are made with the same care they would receive at home and immediately frozen, to preserve their flavour and nutritional properties. All products reach -20°C in a very short time: this way, fresh pasta can reach any kitchen in the world. For an even better yield, each





single piece (even rice grains) is frozen separately, according to the IQF (Individually Quick Frozen) method. Surgital's excellent production site is completed by 70,000 cubic meters of cold rooms and an automated -20°C warehouse with 14,000 pallet places, where over 600 product items - all made with Italian ingredients and raw materials (many of which PDO certified) purchased whole and processed in the in-house kitchens - are stored.

SPECIAL FEATURES

Sustainability



Surgital has built its uniqueness on sustainability. The Lavezzola plant is energy-sufficient and partially water-self-sufficient. Thanks to an integrated system comprising a 1,000 kW/h **photovoltaic plant**, a 6,000 kW/h natural gas **three-generation plant**, and a third 600 kW/h **turbine power plant**, it is completely self-sufficient for the production of electric power, steam and hot water for the processes. Surgital can boast monthly CO2 savings for 370 tons, equivalent to the carbon dioxide emitted by travelling 2.5 million km by car!

Markets and channels

"Piacere Mio!" for the large-scale distribution

Surgital's core business is the food service channel; however, in 2019, the Company launched the "Piacere Mio!" brand, and penetrated the large-scale distribution with its own brand. Destined to the large-scale distribution, "**Piacere Mio!**" is a line of single-serving ready dishes and sauces: six products inspired by traditional recipes, reinterpreted with a modern touch, that make this dish tasty and practical and time-saving at the same time: perfect for modern consumers. In general, Surgital's turnover is divided as follows: Horeca amounts for 67%, followed by large-scale distribution and door-to-door for 29%, and industrial supplies for 4%. The development of the Piacere Mio! Project aims at increasing the large-scale distribution share. Concerning exports, Surgital currently

exports its products to 60 Countries worldwide. The medium-long-term goal is expanding their presence in Europe, while also looking at more interesting targets, such as Canada, some areas of the Far East (Singapore, Hong Kong, Japan), and by strengthening their

investments in the Arabic peninsula (Saudi Arabia and Arab countries). USA remain a strategic market: here, following a strong food service slow-down in the past months, an increase of large-distribution products has been registered.





Massimiliano Bacchini
Surgital's Commercial Director and Member of the Board

“Winning over large-scale distribution”

«We analysed the sector we work in for a few years, before consolidating the “Piacere Mio!” project, which was born two years ago with the aim of extending our know-how acquired in over forty years of business, to the large-distribution field - says **Massimiliano Bacchini**, Commercial Director -. Today, we are ready to meet an actual consumer demand: finding high-quality frozen ready solutions with a high service content for consumers at the supermarket.

Currently, there are six “Piacere Mio!” items, all single-serving products; however, one of Surgital's goals is strengthening our presence in the large-distribution field, by aiming at a greater distribution and range expansion. We've already started this last project: we added a new fish-based sauce to the six ready meals in this line, and the new frozen sauce nugget line will be launched shortly».

News. From pasta dishes to sauces

In the first months of 2021, the seventh “Piacere Mio!” item will be available in the frozen product aisles of several supermarkets.

It is the **Spaghetti with cuttlefish sauce**: before being launched on the market, this dish has been tested on a consumer panel, who chose it between several options.

Thanks to Surgital cooking methods, spaghetti are perfectly ‘al dente’, even after being thawed, and cuttlefish is soft and tasty.

Another news is the expansion of the Piacere Mio! range, which, starting next spring, won't include only single-serving



dishes: it will expand to include also frozen sauce nuggets in 300-gram bags. Strong of the experience acquired also on this kind of product in the foodservice field, Surgital has chosen four items for end consumers that are perfect to dress

pasta or risotto dishes, to be served

alongside appetizers (perfect on bruschettas),

and as meat or fish sauces. A versatile use of these excellent and tasty products, which can be handily stored in the freezer, measured out without waste, and thawed in just a few minutes in a pan or in the microwave.

Surgital Spa's figures

2019 Group's Turnover	86.5 million euro
% division per channel	Horeca 67% / Large-distribution + Door to Door 29% / Industrial supplies 4%
% division per geographical area	Italy 60%; Abroad: 40%
Production	
Headquarters and production plant	Lavezzola (RA)
Daily production	135 tons of fresh pasta; 60,000 single-serving ready dishes; 8 tons of sauce nuggets
Employees	340
Branches	2 (France and USA)
Investments	
New production facility area	+4K square meters (plus the 28K existing ones)
Production lines	5 new lines for filled pasta, long pasta and ready dishes.

Source: company data

Tradition, territory and innovation

In one of the cradles of Italian cuisine, a place of great cooking and fresh pasta traditions, the first small artisan workshop founded in 1980, thanks to a great industrial vision and a link to the tastiest past of our Country, has managed to become an industrial landmark for the food industry in forty years, and also a very important employment and business opportunity for the entire territory. One of Surgital's main values is tradition, meant as taste and also as preparation method: Surgital's goal has always been to place technology at the service of a comfortable and familiar tasting

experience. The integration between human experience and technological innovation is behind the Company's philosophy, through a unique blend where traditional crafts meet new potential, thus configuring the main ingredient of Emilia Romagna and Italian fresh pasta: to this end, machines that cut and knead pasta like expert cooking hands are employed in the production lines. And local value is also one of Surgital's focuses: despite having become enormously greater than when it was founded, it never moved away from its Romagna.

A territory that Surgital is committed to valorise, by limiting its environmental impact and trying to have a proactive role in its social context, even by promoting and supporting local and national charitable initiatives.



Safety and quality

The entire production meets strict food-safety standards, to ensure consumers' health: this commitment involves all employees in working in a safe manner, by complying with the self-assessment plans established in accordance with the HACCP method.

The Integrated Management System complies with

the most important voluntary certifications on corporate organizations (ISO9001), respect for the environment (ISO14001), corporate responsibility (SA8000) and the stricter rules defined by international Standards BRC and IFS on food safety. Every ingredient is supplied by qualified vendors, to ensure a constant top-quality level, while some of the products also have organic-farming and religious certifications (such as Halal and Kosher). Ensuring safety and gaining the trust of the people working with Surgital has always been a priority. In line with this goal, since 2011, the principles of occupational health and safety and the requirements set forth by the international Social Accountability 8000 standard - born to protect the workers' rights and improve their work conditions - have been included in the integrated management system, to promote a corporate culture based on shared principles.

Investments

In 2019, the Group's consolidated turnover was 86 million euro (+7% compared to 2018), while 2020 - for obvious reasons - has been an erratic year, with a very positive start (the first two months registered a significant increase compared to the same period in 2019), and then the deep crisis of the entire sector in the spring and autumn, with a short recovery in the summer.

Surgital has partially compensated for the Horeca losses with the other channels, from door-to-door to large-distribution in PL mode, and, since the end of the 2019, with its own range, "Piacere Mio!".

However, the crisis did not put a stop to the significant investments that Surgital has planned at industrial level.

4K square meters of new production

units will complement the existing 28K, with new production lines and technologies that will help the Company increase its production capacity and develop new product categories. The new production area will be functional before June 2021, with 5 new lines for filled pasta, long pasta and ready dishes. The goal is an organic growth of the internal lines.

Surgital Spa

Via Bastia 16/1 48017 Lavezzola (RA) Italy - Ph. 054580328 - Fax: 054580121

surgital@surgital.it - www.surgital.it



Editoriale Largo Consumo srl
Via Bodoni, 2 - 20155 Milano
Tel. +39 02 3271646 (digitare 2) Fax +39 02 3271840
redazione@largoconsumo.it | www.largoconsumo.info