

Largo Consumo



Production industries

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

According to





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Production industries

According to



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2019 export boom, with a 7% increase in agri-food exports

2019 also registered a new record for agri-food exports: 44.6 billion Euros in worth. Compared to 2018, the percentage increase in agri-food exports amounts to 7%, above all thanks to wine, which is the best-selling Italian food product in the world, with a turnover of 6.4 billion Euros. Analysing the geographical distribution, Italian products are mainly exported to Europe, a destination that accounts for almost two thirds of total exports, peaking in Germany. Germany confirms itself as the most profitable foreign partner for Italian agri-food, with growing demand for food and wine that is Made in Italy, which in 2019 was worth 7.2 billion Euros. However, the United States is also a strategic market, worth 4.7 billion Euros (and a significant increase of 11%). Therefore, the starting point for 2020 is encouraging, despite the losses that will undoubtedly be incurred this year, due to US tariffs and the pandemic.

While the introduction of the tariffs that have been in force since the end of 2019 has already caused a contraction in food imports (excluding wine, for the moment) from Italy, especially affecting the sector of dairy excellence, the forecasts on the effects of the Coronavirus are more worrying: the spread of the contagion is paralysing production and logistics systems, severely limiting the efficiency of the distribution chain, and, in the worst case, complicating the future of agri-food production companies, which are numerous and flourishing in the Po Valley in the Red Zone.

CONSORZIO CASALASCO DEL POMODORO



TOTAL CONTROL OF THE TOMATO SUPPLY CHAIN, 100% ITALIAN, FROM CULTIVATION TO PACKAGING, MAKES THE COOPERATIVE THE LEADING ITALIAN CHAIN FOR INDUSTRIAL TOMATO PRODUCTION AND PROCESSING

Casalasco is a cooperative of about 370 farms whose main activity is the cultivation and processing of tomatoes. Casalasco is also the geographical area south of Lombardy, on the Po, in the province of Cremona, bordering Parma, Mantua and Piacenza. It was founded in 1977 as a farmers' organisation, while in 1982 it built the first processing complex in Rivarolo del Re (Cremona), the current headquarters.

Today, Casalasco represents the leading Italian supply chain for tomato preserves (the third in Europe) and the Board of Directors is chaired by **Paolo Voltini**. Casalasco has three plants (in Rivarolo del Re - (Cremona) - in Gariga di Podenzano - and in Fontanellato). Tomato growing is mainly concentrated in Lombardy and Emilia Romagna (90%) and that allows the company to have a short supply chain. The average distance between the cultivation and the processing

The company in figures

Name: **Consorzio Casalasco del pomodoro**

Main office: **Rivarolo del Re (Cr)**

Associated farms: **370**

Production sites: **3**

Logistics sites: **3**

Number of references: **2200**

Sales offices abroad: **1 (in the USA)**

Employees: **1500**

(including seasonal workers)

Turnover in 2019: **310 million Euros**

Exports compared to overall turnover: **65%**

Co-packing compared to overall turnover: **80%**

Annual processing capacity: **over 560,000 tonnes of fresh tomato**



plant is 50 km on average. The remaining 10% is in Piedmont and Veneto.

The proprietary brands are: **De Rica**, acquired in 2017, and **Pomi**, in 2007, for which the company created a company (Pomi USA Inc) in 2009 that exclusively distributes and markets the **Pomi** brand throughout the United States.

In 2019, Casalasco achieved a turnover of 310 million Euros, an increase of 45 million Euros on 2018. Exports, to 74 international markets (over 50 of which

via the Pomi brand), amount to 65%, 57% of which to European countries. The main export countries are Austria, Germany and France, together with the

United States and Scandinavia. Brands represent 20% of Casalasco's turnover, whereas private labels and co-packing represent about 80%.



De Rica, the proprietary brand Casalasco



The plant in Rivarolo

Production

Casalasco's three production sites are used for about 60 days a year for the so-called "campaign" for the processing of the tomatoes supplied by its member farms. During this period (from late July to late September), all three plants are focussed



Unloading tomatoes

on this activity, which requires complex and organised coordination throughout the entire supply chain.

There are many varieties of tomatoes grown and supplied, but they are typically specified as "industrial round", although actually slightly oblong in shape, which makes them quite easy to harvest in a process that has been fully mechanised for years. Before being harvested, the

tomatoes are analysed to ensure the right degree of ripeness and other chemical-physical aspects to confirm suitability for processing. A line completely dedicated to receiving and processing organic tomatoes has been operating in Rivarolo since 2015. During the period of the tomato campaign, about 1,500 workers are employed by Casalasco, a figure that drops to about half that during the rest of the year.

Communication

Everyone in Italy remembers the famous catch phrase of the television campaign in the eighties "**O così o Pomi**". The media chosen for Pomi for the two-year period 2018-2019 were: TV and cinema ads, web & digital, stores, prize competitions. The De Rica TV campaign (2019), on the other hand, relaunched the brand both for tomato-based products and the new **Legumi al Naturale** range, with 3 subjects for the same number of products as the symbols of a pantry rich in 100% Italian supply chain products. Regarding support provided to end consumers of branded products, its management is the responsibility of the brand and marketing departments. Consumers can communicate with the company through specific sections of the websites, as well as through social media channels. This facilitates lean and fast communication between end consumers and the producer.



The famous slogan from the eighties



Fabrizio Fichera
Marketing
Director & Business
Development
Casalasco

“Our exports balance is positive”

«Tomato growing is an international cultivation that takes place in different countries, with particular focus, in terms of volumes, on California, Italy and China, in that order, due to climatic conditions and suitable soil. The tomato industry is united in an association called **WPTC**, which encompasses 95% of tomatoes grown worldwide. Italy is part of **AMITOM**, one of the seven tomato clusters, which is comprised of the countries bordering the Mediterranean, a sub-category of the tomato world. There are two Italian production basins, in the North and in the Centre-South, among which production is more or less equally divided. While tomatoes are produced in specific areas, they are consumed globally. Since Italy and Spain are large exporters, our exports balance is positive. Tomatoes are consumed in many ways and recipes, they form part of the Mediterranean diet, are suitable for low-sodium recipes, for all ages, for vegans and vegetarians, as well as having no religious barriers. Consumption is growing progressively. Until a few years ago, the most cumbersome competitor on the world market was China, from a processing point of view, but the processing volumes of fresh tomatoes in that country decreased from 2014 to 2019».

Casalasco del Pomodoro Consortium: progression of consolidated revenues and breakdown turnover in 2019 (in Euros and %)

Progression of consolidated revenues (in Euros)	
2016	228.337.576
2017	237.052.104
2018	265.209.302
2019	310.081.000
Breakdown of turnover 2019 (%)	
Total Italy	34,8
Total Export	65,2

Source: company data



Investment in technology

In 2019, Casalasco invested in technology and plant engineering by installing a cold processing ketchup preparation and packaging line which means packages can be filled at room temperature instead of warm temperatures; this technology results in a product with a fresher organoleptic profile than that obtained using traditional technology, as well as brighter colours. The range of

pulp and diced products packed on the **Tetra Recart** lines has also been strengthened, lines that also allow the production of soups and minestrone; these products can be subjected to pasteurisation heat treatment or autoclave sterilisation depending on the characteristics of the products themselves.

Lastly, Casalasco has an aseptic glass filling line, the only one in Europe,

which allows the packaging of products with a high pH (for example, sauces based on cheeses or Carbonara, made for the French market) by applying a UHT type heat treatment (high temperature and rapid cooling) which results in high quality products that are very much appreciated by the market.

Certifications

In addition to product certifications (BRC, IFS, 100% Italian tomato, QC, non-GMO, organic, Halal, Kosher, etc.), all three sites are ISO22005 certified for supply chain traceability.

Two sites are also **EMAS** certified, a voluntary European standard for assessing and improving environmental performance.

The objectives listed in the environmental plan represent the company's commitment to investing in innovative technology aimed at limiting environmental impacts, such as the reduction of CO2 emissions (the target of -10% of emissions was achieved in 2019). Casalasco also benefits from the collective enhancement trademark

filed by the Emilia Romagna Region, called QC (Controlled Quality Mark) and granted to farms that decide to produce and breed according to the integrated production regulations for human and environmental health.

All the tomato producing members of the Casalasco Consortium are **GlobalGAP** certified, an international standard that defines good agricultural practices with requirements also related to environmental and ethical sustainability. For a number of years, the social aspect of the agricultural supply chain has been checked using ethical audits conducted on farms by a third-party certification body.



Giovanna Poletti
Quality Assurance Director
Casalasco

SPECIAL FEATURES

Quality, environment and social responsibility

«Complete control of the tomato supply chain», explains **Giovanna Poletti**, Casalasco's quality assurance director, who has worked for Casalasco for over 30 years, «allows us to operate in an integrated manner, involving all the

parties in the various areas of the Consortium. The establishment of inter-area working groups and the fundamental presence of our agronomic manager in these groups has allowed us to identify food safety, sustainability and innovation objectives which are measurable and can be improved not just at the production sites, but also in the fields and during cultivation. These objectives are monitored using a dashboard of performance indicators (KPIs) which help us communicate our results to our major customers. My responsibility is to maintain an integrated quality system, through the harmonisation of processes at the highest levels of quality standards at the three production sites and to continuously update it by drafting technical specifications of the finished products, quality parameters of the ingredients used, defining controls during the various production phases, reporting non-conformities and complaints in order to identify

improvements that can be implemented. Including the quality control laboratories, a total of 52 people work in the quality assurance area (outside the tomato processing campaign), which is confirmation of the high levels of attention that the company pays to the quality of its products and processes.

In addition to the management, the QA area also includes a manager for the production site, a QC laboratory manager and a project quality coordinator for the three sites. Each QC laboratory has 2 areas (1 chemical-physical and 1 microbiological) which help to guarantee product specifications and food safety.



Quality control

Since 2017, the company has integrated aspects related to quality, safety, the environment and ethics with aspects regarding welfare and well-being in the workplace; with this in mind, cancer prevention screening projects have been developed for all employees of the company. Skin and breast cancer prevention screening was introduced in 2017/2018, while thyroid cancer prevention screening was carried out in 2019».

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DE CECCO

THE DE CECCO FAMILY HAS BEEN AT THE HELM OF A COMPANY THAT HAS MADE THE PRODUCTION OF PASTA, NOW ALSO "GLUTEN-FREE", INTO AN EXCELLENCE THAT IS RECOGNISED THROUGHOUT THE WORLD FOR MORE THAN ONE HUNDRED AND THIRTY YEARS

The plant in Fara San Martino (Chieti)

De Cecco, founded in 1886 by **Filippo Giovanni De Cecco**, in Abruzzo, is one of the oldest companies that produce pasta in Italy. It was the first to introduce production that was independent of the weather, thanks to drying pasta by using hot air. The De Cecco brand was born in 1952, in the period in which the family business became an industrial organisation. During the seventies and the eighties, large-scale distribution began throughout Italy and the world. **Società Olearia** was also then founded. From a mill with a pasta factory to modern industry, the "De Cecco Method" has remained intact for over a century, under the management of the owning family. The main production site

is in Fara San Martino (Chieti), near the Majella National Park. The Ortona plant is 40 km away. The headquarters are in Pescara. De Cecco is the leader in Italy for premium pasta and second in terms of distribution and brand awareness. In our country, De Cecco boasts over 11 million families who buy its semolina pasta, evenly distributed throughout the country, with a growth rate of +35% over the last 10 years. In practice, over 47% of Italian families eat De Cecco pasta. Turnover in 2019 amounted to 482 million Euros.

The new De Cecco Board of Directors consists of **Filippo Antonio** De Cecco, as Chairman and CEO, together with **Giuseppe Adolfo** De Cecco and **Giuseppe**

The company in figures

Name: **F.lli De Cecco di Filippo SpA**
 Headquarters: **Fara San Martino (Ch)**
 Sales offices abroad: **6**
 Production sites: **2**
 Employees (worldwide): **1.030**
 Packs of pasta produced per day: **1.200.000 (600,000 kilogrammes)**
 Turnover in 2019: **482 million Euros**
 Value of exports: **41%**
 Main certifications: **DVN GL company, Environmental Product Declaration (EPD), SA8000**

Alfredo De Cecco. The board also includes **Annunziata** De Cecco, **Eugenio Ronco Municchi**, **Adriano Consalvi** and three external members of the highest prestige: **Mario Boselli**, **Bruno Pavesi** and **Gianni Letta**.

Production

The production site in Fara San Martino covers a surface area of over 260,000 sq.m, with approximately 82,000 sq.m of industrial and office buildings.

The complex includes the grain warehouse, the mill, the production site and the offices. It has a production capacity of about 500,000 kilogrammes per day, thanks to 13 continuous cycle production lines.

In the industrial area of Ortona, there is a modern industrial plant of 250,000 sq.m, of which 45,000 sq.m are occupied by buildings. The plant produces about 400,000 kilogrammes of pasta every day on 11 production lines.

The company inaugurated two new production lines in the Ortona plant in 2013, thanks to which it increased production capacity by 35%. This year the company also decided to invest 80 million Euros to renovate the Fara San Martino and Ortona plants and launch new products.

The current industrial method of drying pasta, which is slow and occurs at a low temperature, draws inspiration from the ancient method of drying in the open air and preserves the natural firmness, as well as the organoleptic characteristics of the raw material.

Today, the product line includes semolina pasta, in different formats, egg pasta and special pasta, such as whole-wheat, organic and Kamut pasta.

The offering is completed by rice and gnocchi, flour, groats, extra virgin olive oil, Balsamic Vinegar of Modena IGP, sauces and tomato derivatives.

The “new entry” in the De Cecco range is **Pasta with 7 Cereals**. There will soon be the launch of 3 **Gluten-Free** lines.



Bronze drawing



Inside the plant

The De Cecco method

Since 1886, De Cecco has chosen the best durum wheat produced in Italy and in the rest of the world. Before being ground, the grains need to pass strict quality controls in their laboratories and be perfectly healthy. The semolina that the pasta factory processes contains only the heart of the wheat, meaning the central part of the grain. It is ground to coarse grain to preserve the integrity of the gluten and obtain a “sweeter” flavour. De Cecco kneads the semolina with cold water

at a temperature below 15° C to keep the proteins intact and ensure that the pasta remains firm during cooking. De Cecco has always used traditional bronze dies, which keep the surface of the pasta rough and porous, to better capture the sauce.

Lastly, the pasta is dried slowly, at a low temperature, up to 36 hours to better preserve the flavours and aromas of the wheat and the natural colour of the semolina.

The durum wheat chain

Expectations for the 2020 harvest are high although the course of the season will determine its size. It is a strategic decision: De Cecco has always searched all over the world, not just in Italy, for the best grain to ensure the high quality of its pasta. De Cecco’s Italian supply chain, in collaboration with farmers in Abruzzo, Molise, Puglia, Basilicata, Marche, Umbria, Lazio, Tuscany, Campania and Sicily, plans to produce nine varieties of durum wheat amounting to an overall harvest of 80 thousand tonnes. De Cecco carefully selects the best crops in Italy, Arizona and California to find all the varieties of wheat with excellent characteristics. Italian wheat contributes to the flavour; Arizona and California wheat contribute in terms of the quantity and quality of proteins, which are fundamental to De Cecco pasta’s famous firmness during cooking.





Carlo Aquilano
Sales Director
De Cecco

“Analysis and efficiency for the *perfect shelf*”

«Among the most important innovations for 2020, in addition to the launches of new products, there are also important category/space management collaborations carried out together with the chains of large retailers for the development of the category and projects related to the implementation of field activities aimed at distribution networks sell outs. We wish to maximise, qualitatively, the presence of De Cecco in stores, through Category projects and assortment reviews/ optimisation, agreed with the trade, to create the “perfect shelf”, enhancing our role of premium brand by analysing consumer demand and the correct positioning of continuous and promotional shelf pricing. Alignment of the assortments to local consumer demand, monitoring of the share of high selling formats, efficiency in terms of space allocation and a reduction of out of stocks are the rules of engagement of a new way of interpreting large-scale distribution shelves analytically. To support these projects, the company has set up a sell-out team with over 20 resources for stores throughout the country. It will work on the implementation and support of shared strategies and aim for a Win-Win-Win result, i.e. a model that satisfies the consumer and rewards the chain and the brand company».

2019 results

In the “Nielsen Top 75 Manufacturer” ranking, the company ranked first in the country for the best percentage growth in value (+12%), in an Italian market characterised by a drop in the consumption of semolina pasta. In the Distribuzione Moderna channel, the performance of De Cecco pasta increased by 16.2%, coming first in terms of growth in absolute market volumes. De Cecco gained 1.9 points of value share (+14.2%), consolidating 2nd place in the market at 15.0%.

Lastly, in 2019, 997,000 more Italian families purchased De Cecco semolina pasta. The company has also increased sales of other products, in particular by registering the highest market growth for

Kamut Pasta, Organic Whole-wheat Spelt Pasta and special Pastas.

In Italy, the percentage for distribution channels are represented as follows: large-scale distribution leads on 79%, followed by Foodservice on 13% and, lastly, by Traditional Grocery on 8%.

Outside Italy, De Cecco has six commercial branches (in Russia, Spain, France, USA, United Kingdom and Germany) and three production plants, acquired in Russia in 2011. Today, De Cecco is present in over 100 countries. The United States is the biggest market (30%), followed by Germany (8.8%), Japan (8%), Great Britain (7.3%) and France (7.1%).

In 2019, De Cecco exported 41% of its volumes sold.



Dry pasta market sales trend, by volume and value, by type (in kg and in euros, December 2018) *

CATEGORY	VOLUME	Variation %	VALUE	Variation %
Dry pasta	669.661.376	-4,8	1.039.515.456	-3,5
Semolina pasta	586.530.048	-5,2	763.369.984	-4,0
Whole wheat pasta Spelled / Kamut	36.649.684	+2,8	86.622.448	+1,4
Gluten Free Pasta	6.068.517	-5,6	30.324.962	-6,6

* Tot. Hyper + Super + Lsp
Source: Nielsen

PERFORMANCE DE CECCO 2019	VALUE (.000 €) VAR. % VS 2018
Semolina Pasta	+15,2
Wholewheat Pasta	+17,5
Kamut Pasta	+21,6
Spelt Pasta	+115,3
Egg Pasta	+4,4
Remilled durum wheat semolina	+0,8
Potato gnocchi	+32,8

Source: Nielsen Market * Track Data Distribution Moderna AT as of 29/12/2019

A recipe by chef Heinz Beck



Communication

The first De Cecco advertising campaign was created at the end of the seventies. From the eighties to the 2000s, communication involved famous testimonials such as **Sabrina Ferilli**. The campaign with which De Cecco returned to TV in 2013, "The secrets of a good pasta", also had a great impact. In this case, communication used a highly successful testimonial, **Michele La Ginestra**, for new episodes in 2015. 2018 saw the launch of a new ad, created by the Lo.Ro agency, featuring the actress

Claudia Gerini. De Cecco is online with a new site that is also optimised for mobile devices and has a significant presence on social channels: more than 100 thousand people on Facebook, including influencers, food bloggers and lovers of Italian cuisine, follow news from the world of De Cecco.

On several occasions, De Cecco has created publications and events in collaboration with great Italian and international chefs. Lastly, De Cecco is an official partner of **Juventus**.

New

The launch of gluten-free pasta

De Cecco has developed a plan to enhance its offering in the health segment and strengthen its Premium positioning through the launch of its **Gluten-Free** range, divided into three Lines: **Gluten-free pasta with only Cereals**, **Gluten-free pasta with Red Lentils** and **Gluten-free pasta with Peas**. In greater detail, these are: six references of gluten-free pasta with only cereals, with a recipe that is unique on the market, only with cereals, a source of protein, bronze drawn with perfect chewability and firmness during cooking; six references of gluten-free pasta with legumes (3 with red lentils and 3 with peas) and a reference of **potato gnocchi** to cover all consumption requirements. The packages will bear the "barred ear" logo, granted by the **Italian Coeliac Association**, so that they are immediately recognisable on the shelves, and the "Alimento senza Glutine. Prodotto erogabile" ("Gluten-Free Food. Distributable product") mark of the Ministry of Health, in addition to highlighting the four cereals used in the recipe and the distinctive advantages of the product.



Research

Researchers at the **University of Milan - Department of Food, Nutrition and Environment Sciences (DeFENS)** carried out a study on the main whole-wheat pastas on the Italian market. The aim of the research was to identify the parameters to define the overall quality of whole-wheat pasta, comparing 10 brands of whole-wheat pasta (5 of which were organic, representing 80% of the Italian market).

The research showed that De Cecco whole-wheat pasta contains wheat germ, is the only one of those analysed to have all the positive effects of drying at low temperatures and, on the basis of scientific evidence, is of superior quality since it more effectively preserves the organoleptic and nutritional characteristics of semolina.



The "Gluten-Free Food. Distributable product" brand of the Ministry of Health



"The 'Barred Ear' logo, immediately recognisable on the shelves"

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FERRARINI



Villa Rivalentella,
headquarters of the
Ferrarini Group in Reggio Emilia

THE REGGIO EMILIA-BASED COMPANY WHICH LAUNCHED COOKED HAM WITHOUT ADDED POLYPHOSPHATES IN 1956 (THE FIRST TO DO SO ON THE MARKET) IS EVER CLOSER TO RETAILERS, THANKS ALSO TO A NEW "SOCIAL" INITIATIVE

Ferrarini was founded in 1956 by **Lauro Ferrarini**, father of the five siblings who currently own the company. It all started with the production of cooked ham without added polyphosphates in Villa Rivalentella, the historic headquarters in **Reggio Emilia** faithfully reproduced on the company logo. It was there that Lauro Ferrarini began, practically "in the kitchen", his tests on **cooked ham**, while also listening to the suggestions of Milanese delicatessens; at their stores, he would listen to those who, from behind the counter, were in contact with people, learning and having lunch with them in the back of their premises. A teaching that would remain engraved in the memory, laying the foundations for pursuing the

goal of producing something capable of earning a place in people's hearts.

Lauro's idea, inherited by the world of agriculture, in particular by Parmigiano Reggiano, was to enter the processing industry with the highest added value, creating a quality product, "gastronomic"

The origins of the Ferrarini family are rooted in agriculture



The company in figures

Name: **Ferrarini Spa**

Main office: **Reggio Emilia**

Production sites: **7**

Companies operating abroad: **6**

Employees: **800, of which 220 abroad**

Turnover in 2019: **200 million Euros**

Some of the first patents



and as natural as possible. Thanks to his particularly innovative approach, it did not take him long to patent an exclusive moulding and cooking system for cooked hams, as well as salting and ventilation systems for seasoning cells for seasoned raw hams,

at his ham factory in Lesignano de' Bagni (Parma). Today, the company is still run by the Ferrarini family, Lauro's 5 children: **Luca, Lucio, Licia, Lisa** (managing director) and **Lia**. Alongside the industrial business, in a supporting role, there is also a working farm, with about

3000 cows, which provide milk for the production of Parmigiano Reggiano DOP; a Parmigiano Reggiano with a unique taste, not only due to the fully integrated supply chain, but also because it is produced using a special mix of Friesian and Jersey cow milk.

Products

Ferrarini produces its cooked ham at the Reggio Emilia site (about 1 million pieces per annum), while in Lesignano de' Bagni, opposite Langhirano (Parma), there are its factories for the production of **Parma DOP hams** and seasoned raw hams. At the Vismara production plant, which has been part of the Ferrarini Group since 2000, it produces salami, mortadella and cold cuts. Ferrarini also produces about 30 thousand forms of Parmigiano Reggiano DOP per year at two of its own dairies. The farming business includes 20 hectares of vineyards, from which typical local wines are produced, such as **Lambrusco**, and which provides the must for the production of Balsamic Vinegar of Modena IGP and traditional Balsamic Vinegar of Reggio Emilia DOP.



Ferrarini cooked ham



Villa Rivalentella, a snapshot of production from the past



The typical slicing of Ferrarini cooked ham

Markets and channels

As for sales, the Ferrarini cooked ham business at the cutting counter represents about 60%. 40% of the overall turnover is represented by traditional stores (such as delicatessens, eateries) and the rest comes from large-scale distribution and exports. Local stores are regaining significant market shares for Ferrarini, while collaboration with all major specialised chains continues in the large-scale distribution sector. With its seven companies operating abroad, Ferrarini markets its products in 30 countries on 5 continents and in particular in Asia and South-East Asia. Europe and North America. An agreement with its future international partner, **Gruppo Pini**, will generate opportunities for growth and access to large new markets, including China.

Communication

Like the core business, communication is developed through social channels and traditional stores. Since last year, Ferrarini has been using communication focussed on the values of the area, under the aegis of “**Sapori d’Italia**” (“Flavours of Italy”); the aim of Sapori d’Italia is to describe the typical food and wine of the area, where the main traditional retail customers are located. On the communication front, packaging also has a fundamental role, especially when it comes to self-service.



Lisa Ferrarini
CEO of Ferrarini

“We process a quality product with maximum hygiene”

«Recent events have shown how robust the Ferrarini brand is and how our cooked ham is so unique and unmistakable thanks to its special original recipe. Fortunately, consumers are the best people to judge the product. In spite of everything, we adhere to our principles, which involve processing a high-quality product according to the same criteria as we set out with at the very beginning, when my father started the business».



The traditional retailer is one of Ferrarini's main customers

The new

Sapori d’Italia, family recipes

«We consider ourselves artisans who are able of producing large volumes”, says **Claudio Rizzi**, the Ferrarini marketing director, “That is also one of the reasons we have a widespread presence in Italy: we supply around 20 thousand traditional stores daily, stores which we regard as vital customers. Therefore, we also try to give visibility to our shopkeeping customers from a communications point of view in order to create a bond with them.

Last year, we began a social activity called “Sapori d’Italia”: every month, on the blog and on Social media, we describe a small area from an eno-gastronomic point of view and through our customers’ stores. This year, we launched an initiative, a “talent show”, so that consumers can describe the “family” recipes that typify the areas they come from. The peculiarity is that the talent starts at the stores. Only thanks to the collaboration of the participating stores will consumers be able to show their recipes and participate in selections held by a jury led by the Michelin star chef **Gennaro Esposito**. The final will take place at Ferrarini’s headquarters, where an award will be given to Italy’s best family recipe».

The initiative launched on 17 February

Cerchiamo la ricetta di famiglia più buona d’Italia!

FERRARINI
SAPORI D’ITALIA
Ricette di famiglia

ISCRIVI
su www.ricetedifamiglia.ferrarini.com la tua ricetta più buona e ricca di tradizione: ti basta utilizzare un ingrediente Ferrarini e caricare la foto del piatto.

PARTECIPA
insieme al tuo salumiere di fiducia alla selezione nazionale condotta dallo chef stellato Gennaro Esposito.

DIVENTA AMBASSADOR
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#ferrarinifood #ferrarinifood

Areas of development

A collaboration agreement is being finalised with the large international Pini Group, formerly the leading pig slaughter enterprise on the DOP circuit (Parma and **San Daniele**) with 2 operating facilities based in Castelveverde (Cremona) and Viadana (Mantua). Now, following the construction in just one and a half years of a new slaughterhouse in Spain (Aragon), it is one of the main players in the sector worldwide with a turnover of around 1.5 billion Euros. Significant quantities of pork legs in seasoning began to arrive at the Ferrarini factory in Lesignano de' Bagni (Parma) and for the production of cooked ham in Rivaltella in 2018, sent from the slaughterhouses of the Pini Group and, in the future, thanks to this partnership, as well as its consolidated relationships with major breeders, Ferrarini will also be able to develop a large-scale "animal

welfare" and "antibiotic free" from birth project. The business plan presented with the support of the Pini Group also provides for the construction of a new plant for the production of cooked hams, which will also be located in the Reggio area.

The Pini Group slaughterhouse in Spain



The production of cold cuts: the goal is to achieve plastic free



Innovation

Following in the footsteps of Lauro Ferrarini's innovative approach, the company has continued to invest in research and development. Recently, efforts have focussed on sustainability in general and packaging in particular. Solutions involving innovative materials are being analysed and tested which will allow disposal of self-service product packaging together with plastic. The cost of these materials is higher than standard materials, so it will be necessary to communicate towards the consumer with the highest possible added value.

The cured meat market in Italy

2018 PRODUCTION	1,184 million tonnes
Var. % 2017	+0,6
Value of production	8.081,9 million Euros
Var. % 2017	+1,3
Italy sales by volume	1,049 million tonnes
Var. % 2017	-0,9
Export 2018 by volume	181.997 tonnes
Var. % 2017	+1
Export 2018 by value	1,5 billion Euros
Var. % 2017	+0,3
Import by volume	51.295 tonnes
Var. % 2017	-8,2
Import 2018 by value	202,7 million Euros
Var. % 2017	-6,7
QUOTA% BY TYPE	
Cooked ham	26,4
Raw ham	21,8
Mortadella	19
Wurstel	19
Salami	7,9
Bresaola	1,4

Source: Assica

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LA LINEA VERDE



FROM SOWING TO HARVESTING, FROM PROCESSING TO DELIVERY USING ITS FULLY OWNED REFRIGERATED TRANSPORTATION NETWORK, THE INTEGRATED AND CERTIFIED SUPPLY CHAIN OF THE BRESCIA-BASED AGRICULTURAL BUSINESS GUARANTEES THE QUALITY OF ITS SALADS AND FRESH PRODUCTS

One of the greenhouses where the salad is grown and then washed and packaged by La Linea Verde



The Battagliola family, owners of the La Linea Verde agricultural business. From the left Giuseppe, Andrea and Domenico Battagliola

The company in figures

- Name: **La Linea Verde Spa**
- Headquarters: **Manerbio (Brescia)**
- Sales offices abroad: **5**
- Production sites: **6**
- Employees: **1,500**
- Products/day: **2 million packages**
- Salad processed/day: **240 tonnes**
- Private brands managed: **over 60, combining Italy and Europe**
- Turnover in 2019: **330 million Euros**

La Linea Verde is one of the major national players in fresh and ready-to-eat fruit and vegetables: salads in bags, fresh ready-made vegetable-based dishes and fresh drinks. An agri-food company with more than 25 years of know-how in the sector of ready to eat vegetable solutions, in refrigerated

transport and with over 40 years of agricultural experience. The Group has 6 production sites (Italy, Spain and Serbia) and 5 sales offices (Italy, Spain, Serbia, France and Russia). The core business is the IV range (ready-to-eat salads in bags) which are produced both under its own **DimmdiSi** brand,

as well as under the brands (60) of distributors. The values that drove the **Battagliola** brothers (founders and owners) to transform the family farm into a European entrepreneurial adventure are their passion for agriculture, an inclination towards experimentation and a profound love for the soil and its fruits.

Integrated, controlled and certified supply chain

“Controlled supply chain” means that La Linea Verde monitors the entire supply chain to ensure total control of the product life cycle: from sowing and harvesting down on the farm, to processing at the production site, right up to delivery to the store. In addition to this modus operandi, there is a controlled and certified supply chain programme that allows the product to be traced up to delivery to the customer, documenting all the intermediate stages. The Manerbio (Brescia) and Bellizzi (Salerno) plants have been UNI EN ISO 22005 certified (certificate of traceability in food supply chains) for more than 15 years. La Linea Verde does not purchase the raw material. Instead producing it through the **Producers Organisation** which it helped to found. The PO includes its own farms and over 60 trusted partners who share the agricultural culture fostered by the Group and provide salads to the



One of the 5 washing steps in the IV range production plant in Manerbio



Greenhouse salad harvesting is mechanised

production plants. Under the guidance of the Group’s agronomists, farmers in the supply chain follow shared guidelines aimed at responsible and sustainable management of natural resources. In addition, they use precision agriculture technologies, which involve a limited use of pesticides and guarantee savings in terms of water consumption. All partners have **Global Gap** (Safety and Environmental Sustainability) and

Grasp (Social Responsibility towards farm workers) certifications.

Therefore, quality starts in the field: from there to the store, La Linea Verde maintains it through speed of action and maintaining low temperatures throughout the entire production process. The raw material is enhanced, not processed, by using low impact technologies that respect the quality of the vegetable matter.



Andrea Battagliola
General Manager
La Linea Verde

“We provide certainties to our agricultural partners to build trust”

«La Linea Verde has an integrated, certified and “short” agricultural supply chain. We have always put ourselves forward as a reference point for the supply chain in order to facilitate its development. We are very interested in developing relationships based on loyalty with farmers, true partners who invest heavily in us. We often repeat a phrase that distinguishes us: “Provide certainty to build trust”. Therefore, twice a year we produce a six-monthly programme of the plant’s needs, enabling planned purchases from our suppliers, which generates a sowing and work programme for

farmers, who then work on a product that has already been sold.

All this allows the focus to be placed on good practices and product quality. Furthermore, the help provided by our agronomists is essential, because they check the greenhouses and agricultural production, but also support the work of farmers through training.

This is where value is created: when you have a reasonable certainty of having already sold the product you are working on, you can invest in technology, meaning better machinery or new generation greenhouses».

The production of salads in bags

Thanks to its agricultural supply chain, La Linea Verde has raw material all year round with consistent levels of quality. We have produce that is the fruit of integrated crop protection and organic farming. After harvesting, the raw material reaches the processing plant and is received in an insulated and refrigerated area, at a controlled temperature. During the cleaning and sorting phases, specialised staff select the best produce by hand. The produce is washed several times in tanks only using drinking water. Subsequently, it is carefully dried by means of a centrifuge or a drying tunnel before going on to the packaging phase.

In the High Care area, at low temperatures and under strict hygiene control, the vegetables are weighed and packaged. The fully recyclable packaging materials are designed to best preserve the specific



Agronomists in the greenhouses and in the fields check agricultural production and also support the work of farmers

types of product. Shortly after the packaging phase, all products are prepared for transport in a large refrigerated logistics area equipped with numerous docks, ready to leave on refrigerated vehicles to the distribution platforms or directly to the sales outlets.



DimmidiSi, a success story

The innovative spirit of the company is expressed through DimmidiSi, the brand owned by La Linea Verde group, with which it offers innovative products with high added value in the fruit and vegetable department; a wide range of “fresh convenience food” products. Today, in Italy, the brand brings value to the department with a consumer turnover of over 80 million Euros in 2019 and a brand awareness of 80% achieved in just over ten years. (Sources: **GFK 2018** research; **Nielsen** data). It is a brand with a positive image and is able to communicate engagingly with consumers.

Tunnels and automatic robots at the La Linea Verde plants



Innovation and technology, strategic investments

La Linea Verde has always focused on innovation, paying continuous attention to monitoring consumption trends in order to offer vegetable solutions capable of responding or anticipating market needs. In support of this *modus operandi*, it concentrates its investments in R&D, marketing and technology. Thanks in part to innovation, La Linea Verde has contributed to the evolution of the fruit and vegetable sector by creating new product categories, such as fresh ready

soups, first and foremost, and then fresh smoothies and purees.

To meet the increase in demand, both in Italy and abroad, further expansion of the Manerbio plant will be completed by the end of 2020, following an investment amounting to 15 million Euros. Investments have also been made in human capital, the digitalisation of production processes according to the principles of “Industry 4.0” and the modernisation of greenhouses.

The headquarters in Manerbio, in the province of Brescia



The IV range market in 2019

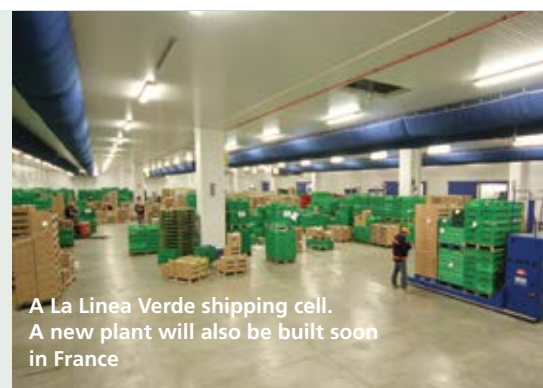
Year-on-year variation in value	+1,1%
Sales value 2019	877 million Euros
Year-on-year variation in volume	+3,1%
Total buyers	20 million households
Average expenditure on purchase	1,89
Purchase frequency	19,5 purchase transactions/year

Source: Nielsen Consumer Panel
Total Italy. Data updated to the week ending 29/12/2019

Sustainability manifesto

For La Linea Verde, sustainability represents a founding principle, a continuous commitment shared by everyone in the Group. It is an integral part of company policy and combines economic growth with respect for people and the environment. La Linea Verde has always cultivated respect, naturalness and authenticity since it is a company founded by farmers who conveyed a strong love for the land to all their collaborators, as well as a continuous drive towards innovation. Innovation that today is also based on the principles of Corporate

Social Responsibility that the company has defined in a new structured plan. An even more virtuous agricultural supply chain, greater energy efficiency and higher water savings, support for increasingly sustainable social projects and packaging have become priority objectives that will decide future investments. The aim of the CSR plan is to enhance and systematise the many initiatives already undertaken by the company in the past, those in progress and future ones and it does so by aiming to pursue the **Sustainable Development Goals** defined in the **UN's 2030 Global Agenda**. Indeed, the Battagliola family business has always been committed to building a better future. Examples of virtuous initiatives in this sense, which



A La Linea Verde shipping cell.
A new plant will also be built soon in France

have already be implemented over the years, are the decision to use recyclable packaging, a virtuous agricultural supply chain with integrated production (since 2002), the optimisation of salad washing water and high energy efficiency refrigeration in the plant.

New. Un Sacco Green

The range of salads in the new biodegradable and compostable packaging is called **Un Sacco Green**. Thanks to the innovative biodegradable and compostable bioplastic material of which it is made, it has a milky appearance that stands out on the shelf. In other words: it's different, it arouses curiosity, it's compostable and it show it.

This obvious difference immediately lets the consumer know that the packaging must be disposed of in the organic waste bin and, after processing, will be turned into compost, fertiliser. The name focusses attention on the project, rather than on the reference. The clear and evocative



Un Sacco Green, the new fully biodegradable and compostable packaging for DimmidiSi salads

graphics, which use colour codes from the world of sustainability, help the consumer to understand it's something new. Un Sacco Green plays an educational role by constructively talking to consumers, giving them the opportunity to be an active part of the virtuous chain started by the company, which will only be completed if they too dispose of the packaging correctly, since the environment needs everyone to collaborate. There are five salad references in this range, which will be available on the market from April 2020 and which, like all DimmidiSi products, is fresh, practical and tasty: for well-being you can enjoy.

LA LINEA VERDE

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PONTI



THE LEADING COMPANY IN ITALY FOR THE PRODUCTION OF VINEGAR TELLS ITS STORY: FROM NOVARA TO THE WHOLE WORLD, A HISTORICAL MADE IN ITALY RENEWED, TOGETHER WITH A NEW IMAGE.

Ponti in Ghemme - in the province of Novara - since 1787, nine generations, is an internationally recognised leader in the production of vinegar. In addition, it also produces pickles and preserves in oil, seasonings and ready-made sauces. Following extensive research in the archives, it was possible to trace the history of the Ponti family in the area back to when they were wine merchants as early as 1595. The date 1787 will appear in the new graphics of all its products. Therefore, there is a very close link to the area, a historical wine and vinegar "district". Today, the management of the company is entrusted to two cousins: **Giacomo Ponti** - who is responsible for the sales and marketing area - and **Lara**

Ponti, who is responsible for the management of personnel, organisation and production. Together, Giacomo and Lara define the corporate strategies and are giving the company an international breadth.

75% of the company's turnover is still generated in Italy, with about 70% coming from the sales of vinegar and the rest from preserves. Ponti is the leader in Italy in all segments of vinegar, with shares of 35-40% in terms of volume and even greater in terms of worth. One of the most recent best sellers is **Dolceagro**® which, thanks to its delicate nature, meets the taste trends of consumers, and is the leader in the "white condiment" segment, in which it accounts for 96% of the market.

The company in figures

Name: **Ponti Spa**
Headquarters: **Ghemme (Novara)**
Production sites: **6**
Sales branches abroad: **2**
Employees: **around 200**
Turnover in 2019: **around 125 million Euros**
Annual checks: **over 70 thousand**



Products

The historical production of Ponti ranges from wine vinegar to **Balsamic Vinegar of Modena IGP**, apple vinegar and glaze vinegar. Ponti also produce for the private labels of some large-scale Italian and foreign chains. Production, which is exclusively Italian, is divided among the two plants in Ghemme, where vinegar and preserves are produced, and the two vinegar plants in Anagni (Frosinone) and Dosson di Casier (Treviso). Balsamic vinegar, on the other hand, is strictly produced in Vignola, in the province of Modena. Lastly, Paesana (Cuneo) is home to the production of the **Bio line under the Achillea** brand, one of the first organic companies founded in the '80s, where cider for apple vinegar is also



produced, from fresh, whole and 100% Italian apples. Each production site has a dedicated quality manager. Quality, Research & Development and Regulatory are located in a single centralised technical area which also guarantees a widespread presence at all production sites.



Markets and channels

The largest export area is Europe, in particular Germany, Spain, Switzerland and France. In fact, one of Ponti's two sales offices abroad is in Paris, while the other is in the United States, a market that Ponti regards as strategic for the international development of the brand and the attention placed on the agri-food market and Italian cuisine. Both in Italy and abroad, Ponti products are mainly distributed using large-scale distribution - in Italy through a widespread sales network - while they reach Ho.Re.Ca. through cash and carry outlets.

Communication

The claim that appears on all Ponti vinegar packaging, together with the logo, is "**aceto da 9 generazioni**" ("9 generations of producing vinegar"). The organoleptic characteristics that define the product are shown on the lower part of the label, to guide the consumer in making a choice: acidity, taste and aroma (fresh or classic, for example, intense or robust). The vegetable preserves are also undergoing a "revolution" in terms of packaging, the restyling of which is switching from a

prevalence of the colour black on the label to a lighter and, in some cases, transparent colour (for example for the **Peperlizia®** brand and for the line of **Zero Olio®** preserves, which contains less than 0.5% fat). Ponti has always invested mainly in television, and more recently also on social media, with a complete communication strategy that supports the brand values and uniqueness of the products. Ponti's main target is young families, with children and with highly "contemporary" tastes.



Investment in technology

Each year the company invests in updating the industrial area, thanks in part to very quick decision-making processes. In 2018, a physical clarification system on vinegar was introduced, which replaced the use of commons used adjuvants with a mechanical action.

The system features high sustainability that allows a substantial reduction of industrial waste.

Continuous investments are also made in the various plants, with the aim of increasing their production capacity.





"Our strength is that we are competitive in all vinegar segments"

«Market shares, penetration data in families, brand reputation indicators: everything confirms that Ponti really is the vinegar preferred by Italians. Few other brands can boast a similar reputation in Italy. Our strength lies in the fact that we are competitive in all vinegar segments. It could be said that our main competitors are the private labels».

New The "Ponti classification"

Density, ripening time and quantity of must are the three main characteristics of Balsamic Vinegar of Modena IGP. To help the consumer choose, Ponti visualised and systematised them in the "Ponti Classification".

It is not a self-certification, but a true classification, unique amongst the PDOs and IGPs in Italy, certified by an external and international body, called SGS, based on objective data measuring the quantity of must, ripening time and density. The lower part of each label shows a visual "explanation".

Easily recognisable graphic symbols have been developed: a bunch of grapes indicates the quantity of must, an hourglass the ripening times, while the density is indicated by a capital D which fills gradually according to both the density and the level of the extracts. A legend "explains" the symbols on the back of the packaging. The characteristics of every Ponti product are higher than the minimum levels defined in the Regulations. This new classification of Ponti balsamic vinegars will not only be shown on product labels, it will also be disseminated via the ponti.com website and social networks. It is mainly dedicated to consumers but is also very useful for instant communication with buyers, especially foreign ones.

Vinegar and balsamic vinegar: sales trend, by volume and value, by type and format

(Jan 2020 vs Jan 2019)

Normal wine vinegar

	V.Value in Euros		V.Volume	
	26 Jan 2020	Variation %	26 Jan 2020	Variation %
Tot. Italy	68.681.127,00	1,66	74.274.765,63	4,79
Hyper	15.224.188,70	0,76	15.730.703,98	3,70
Supermarkets	28.054.923,34	1,94	26.698.548,97	4,29
Discount	14.952.671,89	4,52	22.485.789,41	8,05

Balsamic vinegar

	V.Value in Euros		V.Volume	
	26 Jan 2020	Variation %	26 Jan 2020	Variation %
Tot. Italy	42.444.600,25	0,73	6.379.330,31	0,29
Hyper	14.181.406,92	-2,22	1.693.711,44	-2,37
Supermarkets	19.113.544,34	0,16	2.598.542,76	-0,58
Discount	4.639.555,86	19,98	1.293.986,15	8,84

Source: Nielsen



Certified classification of Ponti Balsamic vinegars of Modena IGP



Areas of development

Ponti is exploring new areas of development based on the main target audience and new consumer trends which, from the point of view of taste, are: a search for sweetness, delicacy and all “fruity” tastes. In addition, it is following the trend of “premiumisation” and, thanks to product innovations, consumption of Ponti glaze is increasing: in this regard, in 2018 Ponti introduced glazes with ginger, turmeric and chilli pepper.

In 2019, among the latest important innovations, Ponti launched its **Premium BBQ sauce**, in two variations made

with Balsamic Vinegar of Modena PGI and with apple vinegar. Pomegranate Dolceagro was also very successful.



Lara Ponti
Director
Ponti

Particular features

Quality, production and traceability

The uniqueness and peculiar character of the Ponti “style” can be seen, for example, in the production of both cider and vinegar.

To make cider, alcoholic fermented apple juice, Ponti starts from the juice of fresh apples, which is then fermented in the Paesana plant, in the province of Cuneo. The apples are 100% Italian. The cider is transported to the vinegar plants and is then transformed into apple vinegar. The production of wine vinegar, on the other hand, starts from acetic bacteria, which are put into contact with the wine and, with the right air insufflation and at a controlled temperature, transform the alcohol into vinegar and lead to the degree of acetic acid. “Our peculiarity”, explains Lara Ponti, director of Ponti (responsible for quality and certifications), “is the ability to manage different types and origins of wine while still providing the consumer with a vinegar that remains recognisable, with the same quality, the same aromas and the same characteristics. It is our “art of blending”. For **Aroma Antico**, we only use Italian



Ponti vinegar aging in Modena

wine, which we age according to the Ponti recipe dating back to 1969. For “single variety of grapes” vinegars, we only use **Chianti DOCG** and **Pinot Grigio** from **Oltrepò Pavese DOC**. Furthermore, Ponti’s production is fully traceable: “The quality and research & development team”, Lara Ponti continues, “have permitted us to perform a review of the management system and food safety standards, so as to have an ISO 22005 traceability management system, certified by **SGS**, for all three vinegar plants. Using the **SAP** management system, it is possible to trace the name, address and even the percentage of each individual wine supplier for each individual bottle of vinegar. Naturally, we also monitor aging: since 1969, we have used the same recipe for special vinegars and single variety of grapes vinegars that age in oak and larch wood barrels for at least 4 months. The management system also allows us to record the moment in which we pour it into the barrels and the system then tells us when to remove it for bottling”.



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