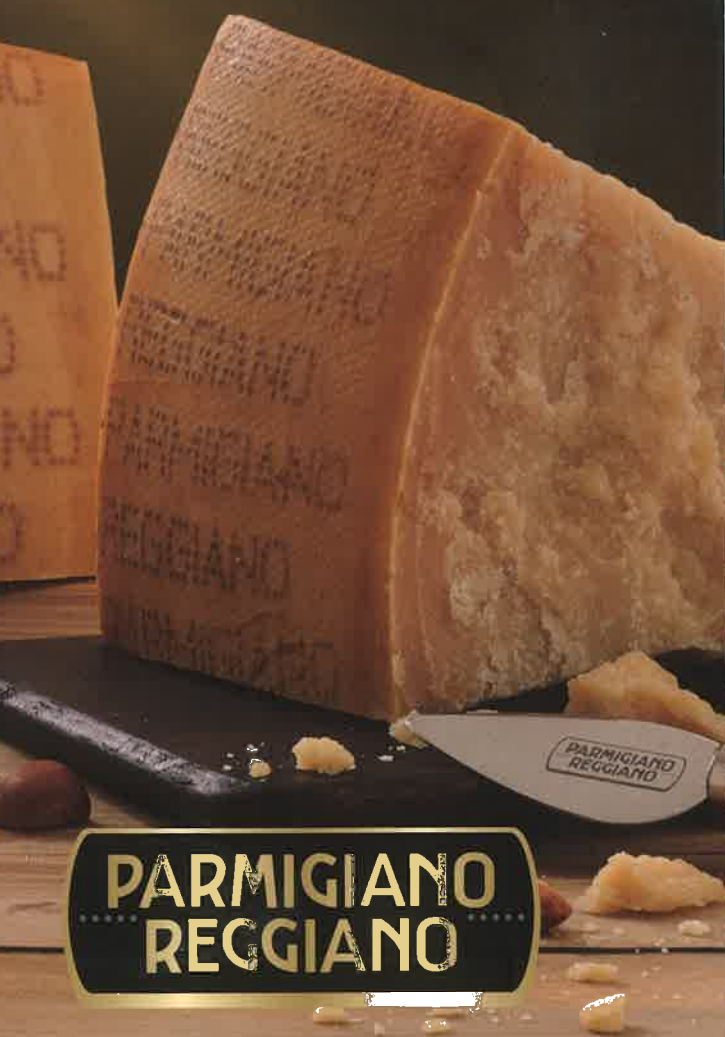


ITALIAN

FOOD

NET

The Only  
Parmesan  
with 1,000 years  
History  
without *Preservatives.*



PARMIGIANO  
REGGIANO

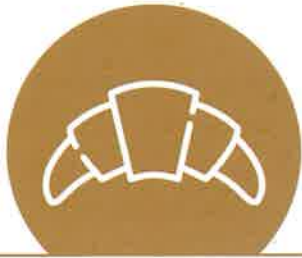
Discover more:  
[parmigianoreggiano.us](http://parmigianoreggiano.us)

SPECIAL ISSUE  
NORTH  
AMERICA  
TIME TO EXPORT



ITALIAN **FOOD** NET  
AWARDS  
USA 2022

OVER 90  
NEW ITALIAN  
PRODUCTS  
CANDIDATES  
IN 10 CATEGORIES



# Trends

## BAKERY & SNACKS

# Italian bakery exports soar

IN 2021, SALES OF BAKERY PRODUCTS TO THE U.S. AND CANADA SHOWED A POSITIVE TREND. THE MOST DYNAMIC CATEGORY, ALTHOUGH WITH LIMITED WEIGHT IN VOLUME AND VALUE, IS BREAD. THE MOST RELEVANT ONE IS LEAVENED GOODS AND CROISSANTS

📍 Marianna Notti



**A**ccording to elaborations by Unione Italiana Food on Istat data for 2021, Italian exports of bakery products to North America have shown positive trends in many product categories: namely cookies, leavened and croissants, bread substitutes and packaged bread. In detail, sweet bakery products are the most important ones for exports to North America.

**The most important category is leavened**

**goods and croissants whose exports to North America in 2021 reached 10,018 tons and generated a turnover of 51.5 million euros, with positive trends of +5.6 percent and +9.4 percent respectively.** The United States imports the largest share (6,689 tons and 32.2 million euros), but trends, compared to 2020, remained stable in volume (+0.3 percent) and dropped 3.4 percent in value. Exports to Canada amounted to about half

## Key factors

### ▶ Wellness at the forefront

Innovation is focused on sustainability, free-from recipes and recognizable better-for-you ingredients. One trend to highlight in the Italian assortments is whole-grain and fiber-rich products.

### ▶ Low glycemic index

A generation of products (sweet and savory preparations and baked goods) made with resistant starch as a substitute for digestible starches has emerged. This contributes to the reduction of the rise in blood glucose after a meal.

### ▶ Upcycling: the next big trend in ingredient sustainability

Various industries have started relying on upcycling for more conscious and sustainable production, with the biscuit industry being no exception. Over the

coming years, more biscuit and cracker brands will experiment with powders and flours from fresh produce, nuts, and seed processing byproducts to create innovative eco-friendly products. Aldi US, for example, has recently introduced cookies made with an upcycled okara flour blend that includes the nutritious pulp leftover from tofu and soymilk production.

### ▶ Sprouted grains

Sprouting grains before milling is a biotechnology to improve the taste and performance of even minor grains and cereal flours, as well as to make the important nutrients in grains more bioavailable. A major player in the packaged bread industry has recently launched a bread with sprouted grain flours, while a renowned mill in Padua has built a unique plant in Europe for sprouting grains,

which it uses for its own flours and supplies to major industries in Italy and Europe.

### ▶ Protein foods

The protein-rich trend is gaining momentum: there are an increasing number of protein products both in the bakery and in the flour and cooking mix segments. In particular, there are numerous bread, pizza, and cake mixes on the market (pancake mixes, in particular, have become very popular), as well as flours for polenta.

### ▶ Indulgence 'with benefits'

While consumers don't reach for the biscuit tin to eat something healthy, they are interested in more healthful options, presenting a challenge for biscuit and cracker producers to juggle health and indulgence.

## Cookies: the Italian export trends in North America

	2020		2021		Change % '21/'20	
	Volume (tons)	Value (mln €)	Volume (tons)	Value (mln €)	Volume	Value
USA	3,931	15.4	4,371	17.8	+11.2	+15.2
Canada	1,718	5.3	1,703	5.6	-0.9	+5.1
North America	5,560	20.7	6,075	23.3	+7.5	+12.6
World	60,077	169.8	64,858	188.4	+8.0	+10.9

Source: Italian Food Union elaborations on Istat data

of the volumes conveyed to the U.S. (3,329 tons), for a turnover of 19.3 million euros, but the trend compared to the previous year was extremely positive: +18.2% in volume and +40.4% in value.

Coming to cookies, in 2021 exports to the United States amounted to 4,371 tons and sales of 17.8 million euros; while exports to Canada stood at 1,703 tons and 5.6 million euros. However, looking at export performance compared to 2020, volume sales to Canada decreased slightly (-0.9 percent) and grew by 5.1 percent in value; while volumes conveyed to the United States grew by 11.2 percent, with a corresponding growth in value of 15.2 percent.

**Lower than sweet bakery are exports of savory bakery, where bread substitutes are the dominant category with 2,116 tons exported to the United States and 486 to Canada, up 9.2 percent and 5.4 percent respectively.**

On the other hand, looking at value, the export of bread substitutes to the United States is worth 8.6 million euros and is stable (-0.3%), while in Canada the value exported is 1.4 million euros, up 20.8%.

Definitely lower is the export of packaged bread: 1,519 tons for 4.9 million euros in

## Bread substitutes (°): the Italian export trends in North America

	2020		2021		Change % 2021/2020	
	Volume (tons)	Value (mln €)	Volume (tons)	Value (mln €)	Volume	Value
USA	1,939	8.6	2,116	8.6	+9.2	-0.3
Canada	461	1.1	486	1.4	+5.4	+20.8
North America	2,400	9.8	2,603	10.0	+8.4	+2.2
World	27,406	79.6	29,159	83.9	+6.4	+5.5

(°) toast, rusks, cracker - Source: Italian Food Union elaborations on Istat data

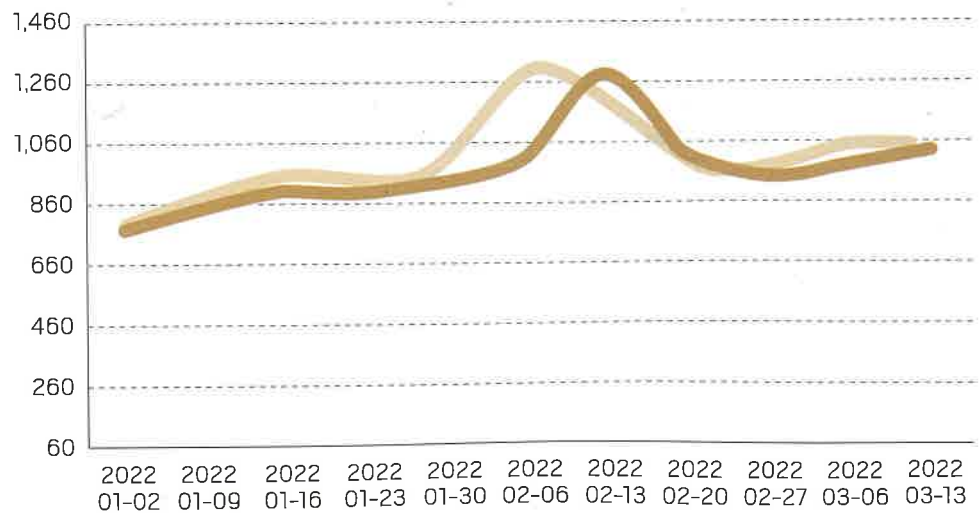
the U.S. and 31 tons for 0.1 million euros in Canada, but the growth trends in this sector are outstanding. Over the past year, exports to the U.S. have increased 27.4 percent in value and 27.2 percent in volume, while those to Canada have seen increases of 46.6 percent in volume and 155.6 percent in value.

## SWEET BAKERY, SALES TRENDS IN THE U.S.

Sweet baked goods are the fourth largest category of Italian exports to the United States. The U.S. market is probably the largest in the world for baked goods. It is estimated that the industry in this sector

## Sweet bakery (°): the trend of weekly sales in the USA In mln US \$, retail channel Jan-Mar 2022

■ Sweet bakery products (2022) ■ Sweet bakery products (2021)



(°) cookies, bars, sugary bars - Source: Nomisma - Agrifood Monitor ERS data



### Packaged bread (including loaf bread): the Italian export trends in North America

	2020		2021		Change % 2021/2020	
	Volume (tons)	Value (mln €)	Volume (tons)	Value (mln €)	Volume	Value
USA	406	1.3	1,519	4.9	+274.0	+272.6
Canada	21	0.1	31	0.1	+46.6	+155.6
North America	427	1.4	1,550	5.0	+262.6	+268.1
World	45,926	109.3	53,346	125.7	+16.2	+15.0

Source: Italian Food Union elaborations on Istat data

### Sweet baked goods are the 4th largest category of Italian exports to USA

### Leavened goods<sup>o</sup> and croissants: the Italian export trends in North America

	2020		2021		Change % 2021/2020	
	Volume (tons)	Value (mln €)	Volume (tons)	Value (mln €)	Volume	Value
USA	6,670	33.3	6,689	32.2	+0.3	-3.4
Canada	2,817	13.8	3,329	19.3	+18.2	+40.4
North America	9,487	47.1	10,018	51.5	+5.6	+9.4
World	181,698	691.9	222,982	867.1	+22.7	+25.3

<sup>o</sup>fruit cakes, currant breads, panettone cakes, meringues, Christmas cakes, croissants, and other bakery products containing >= 5% sucrose, invert sugar, or isoglucose by weight (except for cookie bread, gingerbread and the like, sweet cookies, waffles and wafers, and rusks)

Source: Italian Food Union elaborations on Istat data

### Italmopa has launched a campaign to promote premium organic flours

The U.S. and Canada are some of the countries with the highest demand for organic products, according to Italmopa, the Italian Association of Millers, but statistics on organic flour imports are hard to come by, and are now viewed as relatively low. This is why the project 'Pure Flour from Europe: Your Organic and Sustainable Choice!' was born. It's an ambitious initiative to promote exports of organic soft wheat and durum wheat flour and semolina to the U.S. and Canada and to raise awareness of their high quality. **The goal is to increase exports by close to 300 percent compared to 2020 for Canada and the U.S., and to boost knowledge and awareness of the products among consumers in the two target countries by at least 20 percent.** The project will last three years and include consumer and trade events with product demonstrations led by chefs. There will also be social media and advertising campaigns and participation in important trade shows targeting the grocery, foodservice and food manufacturing sectors. There will also be an educational tour of millers of organic flours and semolina in Italy. "We see great opportunity in North America to grow exports of organic soft wheat flour and durum semolina from Italy. More than ever before, home cooks and chefs are looking for premium ingredients that are healthy, nutritious and grown without synthetic fertilizers. They also want to respect the environment," says **Italmopa President Emilio Ferrari**. "Organic flour from our member companies delivers on all these needs and elevates the quality of most any culinary creation."

supplies about 10,000 large bakeries in the retail channel, of which 30 percent are independent. Companies (e.g., Bimbo Bakery) jointly control just over 50 percent of the market, which thus remains dynamic and highly fragmented. Domestic production, while substantial, is thus not sufficient to cover demand, which is therefore also met by resorting to imports. Sales are expected to be positive in 2022. In fact, **in the first quarter of the year 2022, weekly sales performance of packaged bakery products averaged higher than in the first months of 2021, in the range of \$800 million per week. Baked goods are purchased daily in the United States, with an estimated average annual consumption of 6-7 kg of cakes and pies.** Ethnicity plays an important role in product choice, and consumption is often geographically differentiated. Convenience is an important purchasing driver along with health issues (organic, free from), especially after the pandemic. Thus, this is an area that could attract increasing interest in imports from Italy in the mid-term. ■

© All rights reserved



Since 1992, Puglia Sapori's core business has been **the production of the quintessential Apulian snack: the tarallo, declined in a wide variety of flavorings**, made exclusively with olive oil and extra virgin olive oil following the traditional production process that involves boiling, which is essential to give the product stability and crunchiness. All products are made both under the Puglia Sapori brand and for other companies.

### TARALLI FOR EVERY TASTE

The flagship line is the **retail range, consisting of 250 g taralli and 200 g tarallini**, available in evocative bread-paper packaging, made with 100 percent Italian grains. They are part of the taralli and tarallini range from more classic references (such as extra virgin olive oil, fennel, onion, etc.) to gourmet ones (cacio e pepe, speck and cheese, potato and rosemary, and the new entry with black olives).

**The bestseller is the multi pack consisting of 10 sachets of 40g each. In addition to the conventional line there are also the organic and gluten-free range.** The latter was created in collaboration with the University of Bari and includes, in addition to tarallini, Mini breadsticks perfect for nibbling during aperitifs, and Nuvolette available in classic and with garlic and chives versions.

**Puglia Sapori is also targeting youngest consumers with Puglia**



**la Merenda**, a combo snack aimed at school and pre-school children containing tarallini in single portions, a peach smoothie, and a surprise. **In 2021 the company launched the Buonsani health line consisting of two references of tarallini, rich in nutritional benefits and produced using renewable energy sources:** the Tarallini with beta-glucans from oats, ideal for regulating blood cholesterol levels, and the Tarallini with reduced salt content, which contain at least 50 percent less salt than other Puglia Sapori snacks, and can be perfectly included in a low-sodium diet. Also in 2021, the company introduced to the market **"friselline", a reinterpretation of the classic Apulian frisella, in classic and whole wheat versions.**

### THE NEW ENTRY: I SAPORITI

At the last edition of Cibus, Puglia Sapori presented **a new line of aromatized multipacks: I Saporiti**, consisting of

## CONTACTS



### Puglia Sapori

Via Raffaele Iacovazzo 20  
70014 – Conversano (BA)  
APULIA – ITALY  
www.pugliasapori.com



### EXPORT CONTACT

Roberto Renna  
Director of Operations  
+39.392.1310612  
roberto.renna@pugliasapori.com

two references (each containing six 35g sachets), rich in flavor and naturally flavored. These are the **potatoes & rosemary Tarallini** and the **tomato & oregano Tarallini**, with a classic Mediterranean taste. The company is also working on a restyling of its gourmet line together with the launch of gourmet Tarallini with black olives.

### FOCUS ON NORTH AMERICA

Export sales are becoming increasingly important for the Apulian company, which wants to develop its business across the border. "Our typically Apulian products – the company points out – are enjoying growing success abroad, especially in the United States. **In North America, our presence is ensured both by importers and customers for whom we produce branded snacks. We are also widely present with an exclusive packaging in Eataly stores in strategic cities** such as New York, Los Angeles, and Dallas".

## MORE INFO



### Company Details

Brands Puglia Sapori,  
Puglia la Merenda, Buonsani  
Year Established 1992  
Employees 30  
Ownership Family business  
Annual revenue € 6 million



### Certifications

- Brc Food
- Fda
- Haccp
- Ifs Food
- FSSC 22000



### Products Details

Price positioning Premium

# North America: healthier options are appealing

INNOVATION IS FOCUSED ON SUSTAINABILITY AND BALANCING INDULGENCE WITH BETTER-FOR-YOU ATTRIBUTES. RISING INFLATION OFFERS OPPORTUNITIES FOR PRIVATE LABELS

by Mintel (A year of innovation in biscuits, cookies and crackers, 2022)

**G**lobally, consumers are increasingly aware of the importance of following a healthy diet, and while consumer don't reach for the cookie jar to eat something healthy, they are nonetheless interested in more healthful options. The low expectations for healthfulness suggests that cookie and cracker brands don't need to formulate a resoundingly nutritious product, but rather can appeal consumers by offering them a product which has a hint of healthfulness. This can come from eliminating additives and preservatives, using organic ingredients or removing Gmo ingredients: 44% of adults in the US would be tempted to try a new cookie if it had healthier ingredients. Moreover, US

consumers want a premium product without the premium price. Fuelled by the supply chain disruption caused by the Covid-19 pandemic and a variety of other factors, inflation has risen sharply over the last 12 months and placed additional strain on household finances. With financial reasons a key driver for consumers turning to store brands, **private label product will play an increasingly important role as consumers look to combat inflation.** Though no-frills private label products have significant appeal, consumers are almost twice as likely to gravitate towards premium private label offerings, which often have brand-like levels of quality of ingredients and flavours without the branded price.

**Private labels have been taking an increasing share of cookie and cracker launches in North America**, with a sharp uptick in the last couple of years.

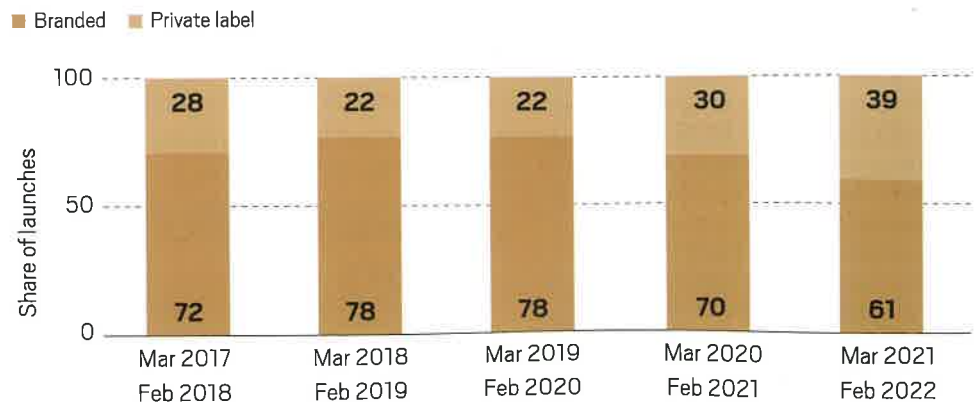
With the appeal of buying private label largely based on value, it is no surprise that in the last year, private label sweet biscuits/cookies were, on average, some 45% cheaper than branded, while crackers were some 55% cheaper. ■

© All rights reserved

**44% of adults in the US would be tempted to try a new cookie with healthier ingredients**



## North America: cookies and crackers launches by private label, 2017-22



Source: Mintel GNPD, March 2017-Feb 2022