



Regions SPAIN



SPAIN



ITALY
5TH SUPPLIER OF FOOD
AND BEVERAGE

THE VALUE OF ITALIAN FOOD AND BEVERAGE IMPORTS IN SPAIN

2,255
€ MLN
+16.1%
2022 vs 2021



2,125 € MLN
+23.7%
2022 vs 2021
FOOD

131 € MLN
38.7%
2022 vs 2021
BEVERAGE

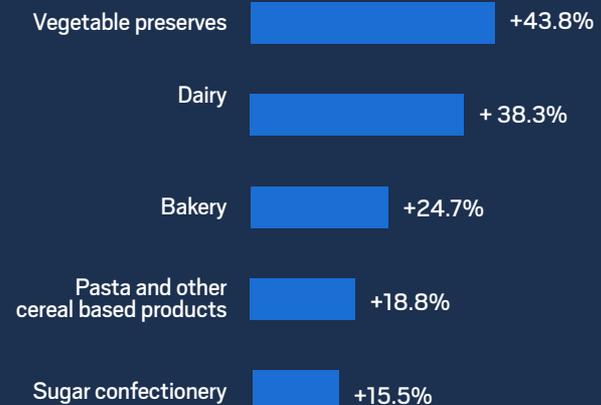
THE 5 MOST EXPORTED ITALIAN FOOD AND BEVERAGE PRODUCTS TO SPAIN

In € mln



THE 5 TOP PERFORMING ITALIAN FOOD AND BEVERAGE PRODUCTS TO SPAIN

Trend 2022/2021



Source: ESTACOM - Foreign trade statistics from ICEX España Exportación e Inversiones. Data processing by ITA - Madrid Agency

SPAIN, THE RESILIENCE OF ITALIAN FOOD EXPORTS

IN 2022, ITALIAN FOOD AND BEVERAGE EXPORTS TO THE SPANISH MARKET EXCEEDED 2.25 BILLION EUROS DEVELOPING A GROWTH RATE OF MORE THAN 20%

📍 ITA Madrid

The consumption of Italian agri-food products in Spain is going through a strong upswing, helped by the end of Covid-related restrictions. **Imports from Italy account for 4.5% of total Spanish purchases, placing Italy in fifth place in the ranking of foreign food & beverage suppliers.** Made-in-Italy food&beverage exports recorded a double-digit trend of more than 16 percent. However, the sharp increase in production costs has generated significant price growth, which, consequently, is reflected in the increase in the value of interchange data. Nevertheless, we can consider the performance of Italian products in Spain as very positive. Both agri-food products (2,125 million euros) and beverages (131 million euros) contributed to this performance with increases of 23.7% and 38.7%, respectively, compared to 2021. In terms of pro-



ITA Madrid has participated in Alimentaria since the first edition

duct categories, dairy products rank first with a value of 260 million euros and a growth of 38.3 percent compared to 2021; to be highlighted, cheese (247 million euros) accounts for 95% of these products. In second place are food preparations (special/protein-concentrated foods, coffee, tea, infusions, soups, ice cream), which reached 241 million euros (+19 percent). This is followed by bakery, confectionery and cookies (182 million euros). Pasta is in fourth place with 176 million euros and 18.8 percent growth. The ranking of Spanish imports of Italian agri-food products closes with fresh and frozen fruit (155 million euros).



€ 2,255 mln

The total value of Italian food & beverage exports to Spain in 2022



The Italian Pavilion organized by ITA Madrid at Alimentaria 2022

THE RESUMPTION OF HORECA

One of the most strategic channels ahead for the future development of Italian exports to Spain is catering. In 2022 there was a slight and steady increase in the presence of Italian food products in Spain, due to both the success of Italian restaurants and the increased awareness of our specialties among local consumers.

Restaurants that can be defined as authentic Italian have begun to give an image of our cuisine that is more responsive to reality and that goes beyond the usual patterns of pasta and pizza. Specialties such as balsamic vinegar, truffles, buffalo mozzarella, burrata, and bresaola that were practically unknown until a few



The Italian pavilion at Fruit Attraction

years ago are beginning to be appreciated by the Spanish consumer.

Enhancing awareness of Italian products both in the retail and horeca channels and among final consumers is key in a country with a strong food identity like Spain. As a result, the latest promotional activity with the large-scale retail trade organized by ITA Madrid in the food sector had as its partner the Spanish chain Supermercados Sanchez Romero (later acquired by El Corte Inglés), which specializes in the sale of high-end food products, with a focus on gourmet products and international specialties. Relative to catering, a promotion of Italian gastronomic excellence was carried out through the Italian restaurant circuit in Spain using Pdo and Pgi products. Horeca represents a powerful channel of information for authentic Italian cuisine, also in view of the lifestyle habits of the local population, which loves the movida. The benefits of varied Italian gastronomy will also be enhanced through various initiatives and events. The ITA Agency in Madrid, in 2022, organized the Italian pavilion at the Alimentaria trade show in Barcelona, which is Spain's leading food and beverage exhibition.

GREEN CONSUMPTION IN FOCUS

But how is the future of food consumption in the Spanish market shaping up? We are witnessing, then, the development of new buying habits, marked by a healthier eating style, with fat-free, unnecessary calorie-free ways of cooking, as well as the use and consumption of fresh produce. Consumption of alternatives to animal-based protein (plant-based products), sustainable consumption (Zero Food Waste), and consumption of local products are three of the top food consumption trends for this 2023. ■

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The value of Italian food & beverage exports to Spain

Products	2022*		2021	2020
	€ Mln	Trend% 22/21		
Agrifood	2,125	+23.7	1,718	1,440
Dairy products	260	+38.3	188	155
Other foods ¹	241	+19.3	202	185
Bakery	182	+24.7	146	121
Pasta and cereal based preparation	176	+18.8	148	138
Fresh and frozen fruit	155	+7.6	144	130
Sugar and confectionery	149	+15.5	129	112
Other oils and fats ²	137	+57.5	87	34
Fish and seafood (crustaceans and shellfish)	120	0.0	120	111
Petfood	90	+26.8	71	57
Cereals and milling industry products	74	+8.8	68	42
Food ingredients and additives	70	+12.9	62	54
Fruit and vegetable preserves	69	+43.8	48	44
Fresh meat and offal	62	+19.2	52	41
Olive oil	54	+5.9	51	32
Meat preparation	49	+22.5	40	34
Tobacco	39	+143.8	16	12
Other animal products	35	+52.2	23	17
Live plants and products of floriculture	29	+16	25	21
Processed and preserved fish and seafood products	26	+160	10	17
Seeds, oil fruits, industrial plants	24	+14.3	21	20
Frozen meat and offal	23	+35.3	17	13
Fresh and frozen vegetables	19	+46.2	13	12
Dry fruit	17	-10.5	19	21
Animals	12	+71.4	7	11
Residues from the agribusiness industry	8	+100	4	2
Cured ham	5	+25	4	3
Beverage	131	+38.7	94	65
Other alcoholic beverages	77	+52.1	50	36
Non-alcoholic beverages	54	+23.4	44	29
Total food & beverage	2,255	+24.4	1,813	1,505

¹ Baby food, special diet, coffee, tea, infusions, soups, ice cream ...

² Margarines, other vegetable oils and fats, animal oils and fats

* Provisional data - source: ESTACOM - foreign trade statistics from ICEX España Exportación e Inversiones. Data processing: ITA - Madrid Agency

ITALY! WE ARE IN TUNE

AN INCREASINGLY AUTHENTIC ITALIAN FOOD MENU IS ALSO BEGINNING TO MAKE ITS WAY INTO SPAIN. AS IN ITALY, REGIONALISMS ARE THUS MAKING THEIR WAY, ALBEIT RICH IN CONTAMINATION AND INNOVATION

📍 Marco Lecis

We are in Spain, specifically in Barcelona, in the region of Catalunya. Italian cuisine landed here several years ago, and the clientele, always receptive and curious, is proving up to the proposed offer. One example? Spaniards love pizza, and pizzerias are experiencing a real heyday. New offerings with sourdough or long leavening (up to 72 hours) are spreading, and Spaniards now know how to appreciate a good Italian pizza, thanks to the great effort that has been and is being made in the restaurant sector. The latest trend? Burrata on pizza, now a real must!

At Bacaro my brigade and I offer our idea of regional cuisine: to the timeless cicchetti, we combine mild risottos, pastas or main courses.

The sweet and sour pairings, typical of Venetian cuisine, evoke some Spanish dishes, so they are welcome and particularly appreciated: space therefore for sardes in saor, baccalà mantecato, spaghetti al nero di seppia, and fegato alla veneziana.

Speaking of my cooking, I started out as self-taught, and only with my move to Spain did I decide to dedicate myself to study.

With training, doors opened in starred restaurants such as Paco Perez's, the cuisine of the Arts in Barcelona, and even in the Balearic Islands. In Palma de Mallorca, my idea of cuisine took shape: this one has, yes, a Spanish imprint, but my 'library of flavors' is typically Italian. Thus, combining theory with my heritage, two gastronomic cultures coexist well in my dishes. Moreover, my homeland is Sardinia, so the gastronomic proposal is Venetian but with a personal and modern touch. Tasting a dish, the idea is to be transported to the Venetian lagoon, although visually we might be in front of a starred restaurant.

I propose contaminations with other cuisines, such as Asian cuisines, this is because I do not only tell



Marco Lecis
Chef at Bacaro

about Italy, but also about all the countries I have visited with my travels.

What does it mean to make Italian cuisine in Spain? The level of dining is high because it is not difficult to find excellent authentic raw materials on a daily basis. And if for freschissimo I prefer local, short chain products, for cheeses, cured meats I choose the great Italian classics, such as Parmigiano Reggiano, Pecorino Sardo and Romano, Guanciale.

I pay special attention to the selection of flours: our pasta is homemade, so I personally take care of the choice of raw materials.

My latest discovery? Milonia, a company in Potenza that produces flour derived from ancient grains, typical of Lucania. Spain madly loves Italian cuisine and proves it with heartfelt participation in events and showcooking. For the last Masterclass we chose as location the Boqueria, the most emblematic market in Barcelona. It was a unique experience where I really felt all the love of the Latin people for our Italian cuisine. ■

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Some dishes from Bacaro restaurant

SUPERMERCADO VERSUS CLUB GOURMET

IN PALMA DE MALLORCA, *ITALIANFOOD.NET* VISITED TWO DIFFERENT STORES UNDER THE EL CORE INGLÈS BANNER TO COMPARE THE TWO DIFFERENT OFFERINGS OF ITALIAN PRODUCTS

📍 Chiara Ambrosi

El Corte Inglés is a business group with more than 80 years of history, upholding the same values as always.

Their steadfast principles of ethical and responsible conduct allow them to evolve towards an omnichannel model more aligned with digitalization, diversification and sustainability. This has meant a progress in the transformation of El Corte Inglés from a retailer to a unique ecosystem.

El Corte Inglés has based its business model on an

attractive, wide and varied commercial proposal, incorporating pioneering products and services permanently. Its history is marked by taking the lead, setting trends, fostering change and creating new concepts. In recent years, a significant part of the efforts have focused on the digitization of all lines of activity. The chain in 2022 developed the following figures: turnover of €12,507.6 million, +79,800 employees, +767.6 mln of visits to the websites and app and +11.6 mln of El Corte Inglés card users.



The El Corte Inglés Club Gourmet store in Palma de Mallorca

EL CORTE INGLÉS SUPERMERCADO

El Corte Inglés is not only an upmarket commercial center. Some big and flagship stores usually contain a supermarket down in the basement. The supermarket of El Corte Inglés is usually considered as a high-end store. There people can easily find products of selection, and even products from gourmet brands.

In the supermarket Italian brands oversee all assortment categories. Starting from the pasta category there is a wide proposal of Italian brands: alongside Spanish Pasta Gallo and the own label pasta, it finds **Barilla** and **De Cecco's** Spaghetti and the **Delverde** range also with its Instant Lasagne with 'how to cook' steps on pack. Italian pasta also in the gluten free display where the retailer proposes the Penne Rigate Rummo and the **Farabella** range that includes shelf stable Potato Gnocchi.

In fresh pasta segment, there is only pasta made in Italy. Also the stuffed pasta of **El Corte Inglés Selection** is produced in Italy. **Giovanni Rana** stands out with its wide range customized for the Spanish market. Beside classic tortellini Ham&Cheese, alla Bolognese and 4 Cheeses it finds the 'Pollo asado' version; as well as beside Potato Gnocchi there are filled 'Bocaditos'.

In the end, **Giovanni Rana Encuentro** line is the gourmet proposal: Pumpkin and truffle, Chocolate and hazelnuts, Brasato and Amarone della Valpolicella wine. In tomato preserves category, **Mutti** competes with the Spanish 'tomato frito'; instead in sauces category **Barilla** rules with a wide range of pasta sauces and pestos. Garofoli is also on shelf.

Among condiments it finds a truffle spray by Turci, an Italian company from Tuscany. Truffle taste also in salumi segment with the **Mortadella Bologna Pgi** by **Ferrarini**.

In grocery section, **Rigoni di Asiago** is present with **Nocciolata** spreadable creams and **Natù** organic jams. Even in the frozen assortment it stands the complete range of products free from by **Valsoia**.

**In fresh pasta segment,
Giovanni Rana stands out.
Also the stuffed pasta
of El Corte Inglés Selection
is produced in Italy**



CONDIMENTS

Ponti's Balsamic Vinegar of Modena Pgi in glaze



SWEETS & CONFECTIONERY

By Rigoni di Asiago, Nocciolata and Natù



PRESERVES & SAUCES

Above, the display of Mutti tomato preserves; below the wide range of Barilla sauces



SALUMI

Mortadella Bologna Pgi of El Corte Inglés Selection line is provided by Gianni Negrini



PASTA

Italian brands rule on the pasta shelf of El Corte Inglés Supermercado



In the **Club Gourmet store**, the retailer raises the positioning level of all assortments: in the **pasta category** there is a high quality selection of both Italian brands and Italian specialties

EL CORTE INGLÉS CLUB GOURMET

In the Club Gourmet store the retailer raises the bar of all the assortment positioning and this is true also for the Italian offer. In pasta category there is a high quality selection both of Italian brands and Italian specialty products. Starting from the range of **own label pasta produced in Italy, that is bronze drawn - slowly dried at low temperatures**. The packaging has an educational about the cooking steps in order to obtain a pasta 'al dente'. The retailer chooses the same price positioning for the special Lumaconi of **Cavalier Cocco**: at a price of €4.30 they are the "entry level" of the branded offer. Big Italian brands are on the display: **Martelli** stands on the shelf with some regional specialties such as the Fusilli di Pisa or the Maccheroni di Toscana; **Mancini Pastificio Agricolo** presents special pasta shapes such as Paccheri, Bucatini and Chitarra; **Filotea** distinguishes itself with its particular pack format; **Cipriani** stands out thanks to the elegant Tiffany blue box.

Very interesting also the dairy display: it includes a selection of **Parmigiano Reggiano Pdo by Parmareggio** in pieces, petals and grated, and other specialties from Italy like the **Mascarpone** da latte di Montagna from South Tyrol, **Pecorino Romano Pdo**, Moliterno al tartufo and the original **Camembert di Bufala produced by 3B Latte** (Inalpi).

According to the festivity time, an entire shelf is reserved to the Easter colombas including the **Classic Colomba by Borsari** and the **Chocolate Colomba by Pasticceri Siciliani**. Other Italian brands are in the bakery categories. Among cookies there is **Biscottificio Orlando Grondona** with Gallette biscuits, Cantuccini and the typical Canestrelli from Genova. Another Italian regional specialty is in the savory segment and comes from Sardinia: the **Pane Carasatu Guttiau by Smart**. ■

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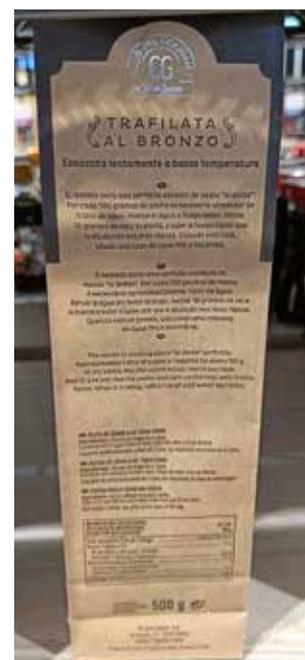
DAIRY

Among a wide range are classic Parmigiano Reggiano and Camembert di Bufala



PASTA

The high end assortment of dry pasta



BAKERY

From left: Biscottificio Orlando Grondona with Gallette biscuits, Cantuccini and Canestrelli

MERCADONA, NOT ONLY ITALIAN PRIVATE BRANDS

IN PALMA DE MALLORCA'S STORE *ITALIANFOOD.NET* REMARKS THAT ITALIAN SUPPLIERS ARE PRESENT IN THE RETAILER ASSORTMENT AS OWN LABEL SUPPLIERS BUT ALSO WITH THEIR BRANDED PRODUCTS

📍 Chiara Ambrosi

Mercadona is the most popular Spanish supermarket and is famous for great balance between variety and proximity: if you are in search of something that is not easy to find in other supermarkets, try to look for it in your Mercadona store. However, not like other hypermarkets, there are more Mercadona stores and it's averagely more accessible. Products produced under its brand: especially the food products because most of them are gluten-free. Spanish supermarket chain Mercadona reported a turnover of €31 billion, up 11% year-on-year on a like-for-like basis, in its financial year 2022. Out of the total, €30.3 billion

was generated in its home market and the remaining €737 million in Portugal (up 77.6% year-on-year). The retail group's net profit amounted to €718 million, up 5.6% on 2021.

**Mercadona chain reported
a turnover of €31 billion,
up 11% year-on-year
on a like-for-like basis
in its FY2022**



The outdoor overview of Mercadona store in Palma de Mallorca

HACENDADO IN THE SPOTLIGHT

Starting from the dairy category, the own label Hacendado marks Italian specialties such as Mascarpone, Mozzarella di Bufala Campana Pdo by Caseificio Tre Stelle, Burrata by Sanguedolce, an Apulian company, Gorgonzola Pdo by Igor and grated Grana Padano Pdo by Zanetti. **Zanetti is on the shelf also with its brand for pieces of Grana Padano Pdo.** Certified Italian products are also in condiments segment where we find the Aceto Balsamico di Modena Pgi. The Hacendado label marks also the entire range of fresh pasta produced by Bertagni, an Italian company from South Tyrol. Besides potato gnocchi and fresh tagliatelle, there are different shapes of stuffed pasta with typical Italian fillings such as Parmigiano Reggiano and Truffle or Aubergine, tomato and mozzarella, Ricotta and spinach. However, the own brand dry pasta assortment is locally produced and the Italian brands are on shelf with a higher price positioning. For example, we find the range of **Pasta Armando** at € 1,24 (vs €0,76 Hacendado). Close to pasta, we notice **Bia brand, Italian leader for couscous**. Other Italian suppliers are in the fresh ready meals segment: here there is **La Linea Verde, a top Italian producer of vegetable soups**. In pasta sauces category there are different Italian tastes and the 'new on shelf' **Hacendado Datterino sauce produced in Italy by Gustibus Alimentari.** ■

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DAIRY

Mascarpone, Burrata, Mozzarella di Bufala Campana Pdo provided by Italian suppliers



PASTA

In the spotlight two big Italian brands: Pasta Armando range and the Bia CousCous



CONDIMENTS

Balsamic Vinegar of Modena Pgi on the shelf



PRESERVES & SAUCES

Hacendado Datterino by Italian Gustibus Alimentari

OWN LABELS FROM ITALY

IN PALMA DE MALLORCA, *ITALIANFOOD.NET* VISITED TWO DIFFERENT DISCOUNTS, ALDI AND LIDL, IN ORDER TO DISCOVER MORE ABOUT THE ROOM RESERVED TO ITALIAN PRODUCTS

📍 Chiara Ambrosi

The discount market is a popular type of supermarket that people tend to frequent in Spain. These supermarkets usually do not have delicate and beautiful store designs but many products in bulk. In Spain, there are three main discount supermarkets: **Lidl**, a famous German discounter offering a great range of items. People are especially crazy about their small household appliances and flash offers.

Aldi, another German discount supermarket, with different products and **Dia**, a Spanish discount supermarket, stocking many own labeled products and other national brands. It usually has a better variety of items than its German counterparts.

LIDL, ITALY 'BEHIND' THE OWN LABELS

First of all Italian brands as own label suppliers are present in fresh pasta category. For example, the Italian **Pastificio De Angelis is the supplier of Chef Select Line of stuffed pasta**; however **Pastificio Lo Scoiattolo customizes the Deluxe line of premium pasta with special fillings** such as Prawns and Crabs, Pecorino and Honey, or Squid ink tortellini stuffed with salmon. Italian big brands are of course in the deli segment: **Salumifici Granterre provides the Mortadella Bologna Pgi** and **Zanetti supplies the Grana Padano Pdo** offer under the own brand Milbona. In the dairy shelf there are other Italian specialties such as the **Mozzarella di Bufala Campana Pdo**, the **Burrata by Capurso Azienda Casearia** and the **Gorgonzola Pdo by Igor Gorgonzola**. Moreover, Lidl with the own label **Italiamo** offers a complete range of Italian products. In the dedicated section the shopper can find the typical Italian tomato puree, Bruschette all'olio d'oliva, Risotto alla Milanese, Italian pasta specialities, oregano and condiments. There are also bitters and sauces for the Italian aperitivo and Tiramisu as dessert.



DAIRY

The products of Lidl's label Milbona are mainly provided by Italian suppliers



SALUMI

Mortadella Bologna Pgi is by Salumifici Granterre



PASTA

From the left, Chef Select pasta by Pastificio De Angelis; the display of Italiamo line



The storefront of Lidl discount in Palma de Mallorca

Even if it is a discount, Aldi dedicates two areas to Italian brands: Barilla and Mutti

ALDI, ITALIAN BRANDS ON THE SHELF

Unlike Lidl, Aldi uses different own labels per each product category to identify Italian products. For example, in the dairy segment the **D'Antelli brand** joins all the Italian specialties such as Grana Padano Pdo, Parmigiano Reggiano Pdo and Gorgonzola Pdo in both sweet and spicy variants. There are also Provolone produced by **Auricchio**, Mascarpone by **Galbani** and Mozzarella di Bufala Campana Pdo by **Granarolo**. However, **Mamma Mia is the own brand used across different categories**, for example in **dry pasta** segment with products provided by **Pasta La Lucana**, an Italian pasta producer from Basilicata. Mamma Mia brand covers also all the fresh pasta assortment: here are **fresh tagliatelle**, **potato gnocchi** and all types of **stuffed pasta with gourmet fillings** such as Pumpkin, mascarpone and sage or Ham, prawns and mozzarella. Beside fresh pasta there is the Mamma Mia range of fresh pizzas with a wide choice of tastes and toppings. In tomato preserves and sauces shelf, competing with Spanish tomato frito there are Mamma Mia **pestos and pasta sauces**. Among gourmet sauces under the own label Special there are Italian specialties from Sicily: the **Semi-dried cherry tomato sauce and the Sicilian pesto produced by Rosso Ciliegino**. Consider that even if Aldi is a discount there are special areas reserved to two Italian wellknown big brands: a promotion shelf for Spaghetti **Barilla** and an extra display for **Mutti** sauces. ■

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PASTA

Pasta Barilla and Italian fresh pasta in Aldi assortment

DAIRY

Under D'Antelli brand, Italian Pdo and Pgi products and other dairy specialties provided by Auricchio, Galbani, Granarolo



BAKERY

On sale, Mamma Mia Mini Panettone al Cioccolato



PRESERVES & SAUCES

Specialty sauces from Sicily are provided by Italian producer Rosso Ciliegino. On the right, an extra display for Mutti's puree





Editor in chief

Paolo Dalcò

Deputy editor

Francesca Zecca
f.zecca@gruppofood.com

Editorial staff

Marta Bommezzadri (Italianfood.net)
m.bommezzadri@gruppofood.com
Monica Nastrucci (Foodservice)
m.nastrucci@gruppofood.com
Andrea Torelli (editor)
a.torelli@gruppofood.com
Paola Binaghi (editor)
p.binaghi@gruppofood.com

Graphic design: Tania Belletti

Layout: Elisa Ghiotto

Contributors to this issue:

Chiara Ambrosi, Davide Dalcò,
ITA Madrid, Elena Stocco

PUBLISHER:

FOOD s.r.l.

via Mazzini, 6 - 43121 Parma
via Giuseppe Pecchio, 14 - 20131 Milano
Phone number: +39.0521.388511
E-mail: info@italianfood.net
www.gruppofood.com

MARKETING AND SALES

Valentina Sodano
Phone number: +39. 335 131 5758
v.sodano@gruppofood.com

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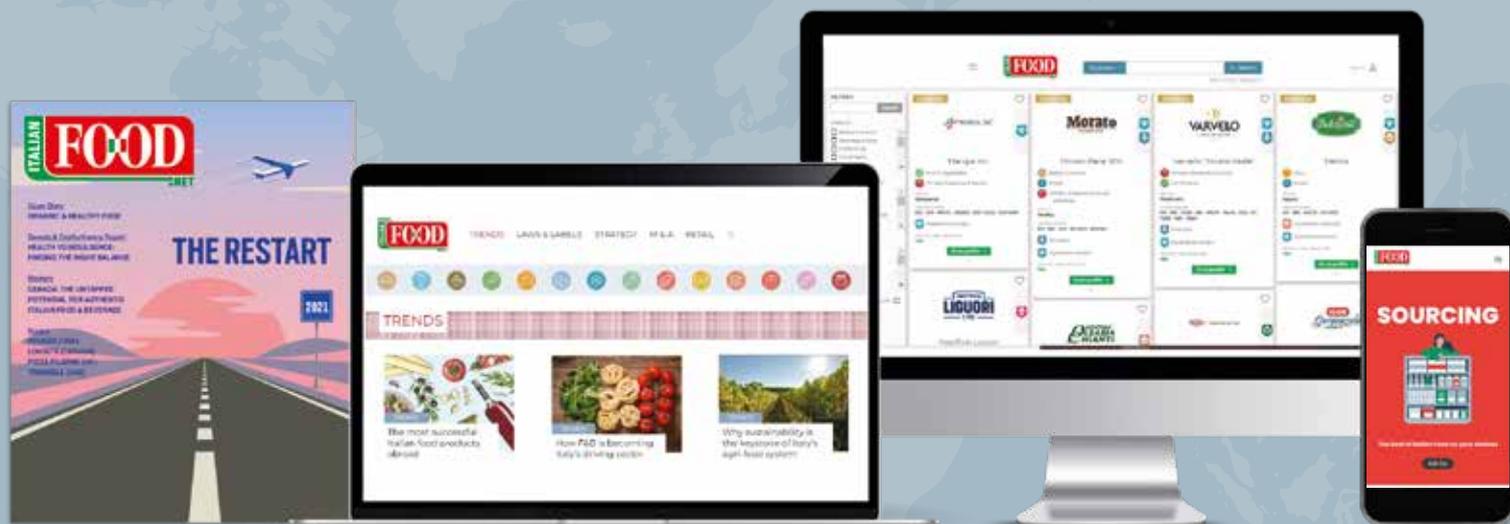
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