MEDITERRANEAN/ITALIAN PERSPECTIVE WITH FOCUS ON GI PRODUCTS

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ASSICA - Director

12th October 2023

OUTLINE

ASSICA
Associazione Industriali delle Carni e dei Salumi

- Italian market of deli meats: numbers and figures
- Italian market of deli meats: certification and control
- New perspectives and challenges

ABOUT US

ASSICA
Associazione Industriali delle Carni e dei Salumi

ASSICA – Associazione Industriali delle Carni e dei Salumi

The national representative Association of the producers of deli meats (processed pork and beef products) and pig slaughterhouses within the framework of The General Confederation of Italian Industry

THE NUMBERS OF THE SECTOR

(source: ASSICA data processing on EU, ISTAT and ISMEA data)



Workers
about



Farms
If including small ones also intended for self-consumption, the number rises to about 26000 units



Slaughtering Plants



Transformation Companies
If micro-companies are included, the number rises to about 2000 units

ITALIAN MARKET OF DELI MEATS (2022 – pork and beef)

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Turnover: *8,9 billion*

Export: *2,1 billion*

Import: *0,323 billion*

Production: *1.393 tons*



PDO/PGI ITALIAN ECONOMY – FOOD



321 PDO/PGI PRODUCTS

174

147

- ***Production value :*** *8 billion*
- ***Sales value:*** *15,8 billion*
- ***Export value:*** *4,4 billion*

Ismea-Qualivita – Report 2022

CLASS 1.2. MEAT PRODUCTS (COOKED, SALTED, SMOKED, ETC.)

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MOST VALUABLE IN 2022

PARMA
PROSCIUTTO DI PARMA

PROSCIUTTO DI SAN DANIELE
SD

CONSORZIO ITALIANO TUTELA MORTADELLA BOLOGNA

CONSORZIO DI TUTELA
BRESAOLA DELLA VALTELLINA

Südtiroler Speck g.g.A.
SÜDTIROL
Speck Alto Adige IGP

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REGISTRATION OF A PDO/PGI

MINISTERIAL DECREE 14 OCTOBER 2013, No 12511

National implementation of the Regulation (EU) 11511/2012 on PDO, PGI, TSG agri-food products

1. Eligible parties prepare the applications

2. Applications to be submitted to the Ministry of agriculture, food sovereignty and forestry and to the authority of the Region/s where the production occurs

3. A PDO or PGI application must include a Product Specification

4. The Ministry convenes a meeting for public assessment

5. Decision on the application with potential national oppositions

6. European Commission examination process with potential opposition under Article 51 of Regulation (EU) No 1151/2012

7. Registration



CERTIFICATION OF A PDO/ PGI

Ministero delle Politiche Agricole e Forestali

DIPARTIMENTO DELLA QUALITÀ DEI PRODOTTI AGROALIMENTARI E DEI SERVIZI

DIREZIONE GENERALE PER LA QUALITÀ DEI PRODOTTI AGROALIMENTARI E LA TUTELA DEL CONSUMATORE

DISCIPLINARE DI PRODUZIONE DELLA DENOMINAZIONE DI ORIGINE PROTETTA "PROSCIUTTO TOSCANO"

Art. 1 Denominazione

La Denominazione d'Origine Protetta "Prosciutto Toscano" è riservata al prosciutto crudo stagionato che risponde alle condizioni ed ai requisiti stabiliti nel presente disciplinare di produzione.

Art. 2 Zona di produzione

Gli allevamenti dei suini destinati alla produzione del Prosciutto Toscano debbono essere situati nel territorio delle regioni Lombardia, Emilia Romagna, Marche, Umbria, Lazio, Toscana, Piemonte, Veneto, Friuli Venezia Giulia, Abruzzo e Molise.
I suini nati, allevati e macellati nelle suddette regioni sono conformi alle prescrizioni già stabilite a livello nazionale per la materia prima dei prosciutti a denominazione di origine di Parma e San Daniele.
Gli allevamenti devono infatti attenersi alle citate prescrizioni per quanto concerne le razze, l'alimentazione e la metodologia di allevamento.
I suini debbono essere di peso non inferiore ai 160 Kg, più o meno 10%, di età non inferiore ai nove mesi, aventi le caratteristiche proprie del suino pesante italiano definite ai sensi del Reg. CEE n.3220/84 concernente la classificazione commerciale delle carcasse suine.
Il macellatore è responsabile della corrispondenza qualitativa e di origine dei tagli. Il certificato del macello, che accompagna ciascuna partita di materia prima e ne attesta la provenienza e la tipologia, deve essere conservato dal produttore. I relativi controlli vengono effettuati direttamente dalla struttura di controllo indicata nel successivo art.7.
Il Prosciutto Toscano viene elaborato, affettato e confezionato nella tradizionale zona di produzione che comprende l'intero territorio della Regione Toscana.

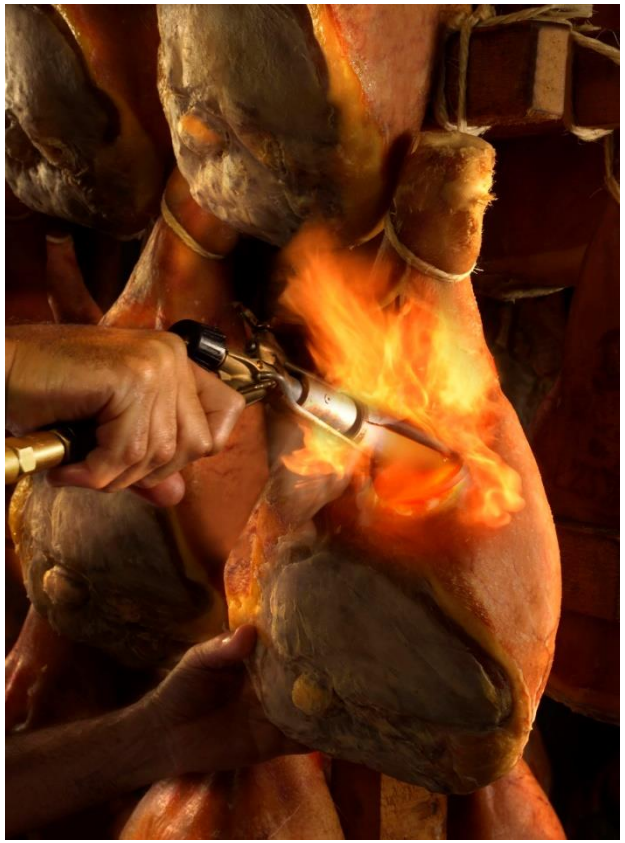
Art. 3 Materie prime

Il Prosciutto Toscano è derivato dalle cosce fresche dei suini pesanti corrispondenti alle caratteristiche dell'art.2. I suini devono appartenere a razze in purezza o derivate dalle razze tradizionali di base, Large White e Landrace. Sono ammesse altre razze ma che non abbiano incompatibilità con le finalità del libro genealogico.
Nel procedimento di salatura si impiega una miscela di sale pepe e aromi naturali derivanti da bacche ed essenze vegetali tipiche del territorio di elaborazione.

Art. 4 Metodo di elaborazione

Subito dopo la macellazione le cosce isolate dalla carcassa sono sottoposte a refrigerazione per almeno 24 ore ad una temperatura compresa fra -2 e +2°C.
Successivamente si procede alla rifilatura, con un taglio ad arco che lasci una cornice carnosa che, a stagionatura ultimata, non sporga più di 8 cm oltre la testa del femore, all'asportazione del piedino,

1



CONTROLS

Ministry of agriculture, food sovereignty and forestry

MINISTERO DELL'AGRICOLTURA DELLA SOVRANITÀ ALIMENTARE E DELLE FORESTE

DIPARTIMENTO ICQRF
ISPETTORATO CENTRALE DELLA TUTELA DELLA QUALITA' E REPRESSIONE FRODI DEI PRODOTTI AGROALIMENTARI

Control of compliance with the Production Regulations of Italian Geographical Indication products

A. During the production

B. On the market

DURING THE PRODUCTION | WHO?

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ECEPA
Ente di certificazione prodotti agro alimentari

IFCQ

CSQA

RINA AGROQ

Authorized by Ministry of agriculture, food sovereignty and forestry

Regulation (EU) No 1151/2012

MINISTERO DELL'AGRICOLTURA DELLA SOVRANITÀ ALIMENTARE E DELLE FORESTE

Accredited by Accredia

(ISO/IEC 17065:2012)

ACCREDIA
L'ENTE ITALIANO DI ACCREDITAMENTO

DURING THE PRODUCTION | HOW?

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THE CONTROL PLAN

- ***Based on the Product Specification***
- ***Reviewed and approved by ICQRF***
- ***Check the self-monitoring of operators***

Farmers: area of origin, raw materials, genetic type, stages of pig-rearing, identification, etc

Slaughterers: method, weight, carcasses, slaughter age, identification, etc

Producers: method of production, curing time, organoleptic characteristics, ingredients, identification, etc

DURING THE PRODUCTION | WHY?

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NON COMPLIANCES

1. *Minor non-compliances*
2. *Major non-compliances* → Financial penalties (usually) – Decree No 297/2004

In case of fraud : criminal code e corporate liability

ON THE MARKET

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- To protect consumers and producers from confusion, evocations, infringements, imitations, counterfeiting, trademarks – Decree No 297/2004 (financial penalties and/or injunctions); in case of fraud, criminal code e corporate liability

- Technical department of Ministry of agriculture, food sovereignty and forestry with functions of judiciary police to prevent frauds (ICQRF)

- "Agenti vigilatori" of Consortia in cooperation with ICQRF to verify products "similar to PDOs/PGIs" produced and commercialised in the EU

ICQRF REPORT 2022

Interventions on the web and abroad – 2015 – 2022

Protected products	Cases (no.)	Web cooperation	"Wine" authority	ex-officio
Prosecco	1,247	439	808	
Parmigiano Reggiano	559	389		170
Olio di Puglia	528	528		
Toscano (EVO oil)	339	304		35
Wine kit	283	33	250	
Prosciutto di Parma	227	75		152
Olio di Calabria	196	196		
Amarone della Valpolicella	178	16	162	
Aceto Balsamico di Modena	165	72		93
Salsiccia di Calabria	114	113		1
Sicilia (EVO oil)	111	110		1
Umbria (EVO oil)	106	106		
Pecorino Toscano	93	66		27
Soppressata di Calabria	92	91		1
Capocollo di Calabria	70	69		1
Asti	69	1	68	
Grana Padano	55	20		35
Molise (EVO oil)	53	53		
Pecorino Siciliano	53	53		
Dauno (EVO oil)	52	52		
Pancetta di Calabria	47	47		
Asiago	46	42		4
Peperone di Senise	45	45		
Gorgonzola	45	41		4
Finocchiona	44	40		4
Liquirizia di Calabria	42	42		
Salamini Italiani alla Cacciatora	41	36		5
Terra di Bari (EVO oil)	41	41		
Prosciutto di San Daniele	38	11		27
Cantucci Toscani	37	37		
Pecorino Romano	34	31		3
Mozzarella di Bufala Campana	33	30		3
Pecorino Sardo	33	30		3
Lenticchia di Altamura	24	24		
Montepulciano d'Abruzzo	24	9	15	
Nocciola di Piemonte	24	24		
Campi Flegrei	21	21		
Barolo	21	3	18	
Prosciutto Toscano	21	17		4
Other products	*573*	*396*	*119*	*58*
Total (no.)	5,824	3,753	1,440	631

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NEW PERSPECTIVES



INNOVATION

RESEARCH

PROMOTION

REAL CHALLENGE: SUSTAINABILITY

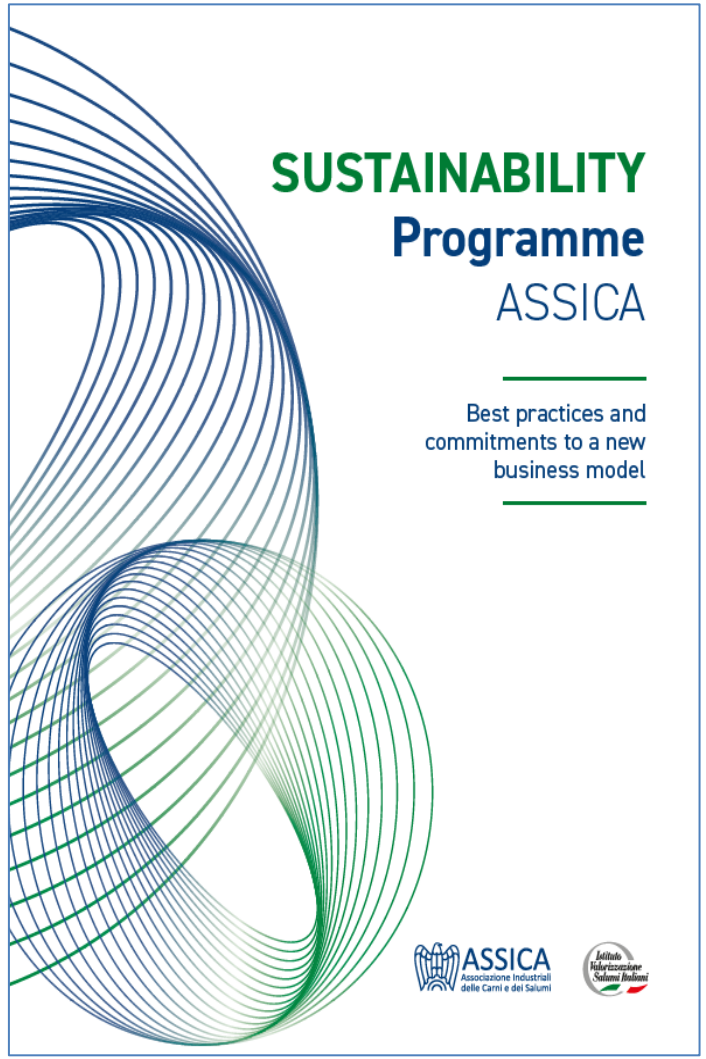
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ASSICA with IVSI (Institute for the promotion of the Italian Deli meats) has recently presented the «SUSTAINABILITY PROGRAMME» of the Italian deli meats sector for companies to improve their contribution to the achievement of the Sustainable Development Goals set by the 2030 Agenda of the United Nations (SDGs).



<u>Targets:</u>

1) ***Collect the main best practices of the sector. These best practices are useful for companies to improve their performance in terms of environmental, economic and social sustainability***
2) ***Highlight that the sector is proactive in sustainable development***



«SUSTAINABILITY PROGRAMME» ASSICA

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Focus

The document deals with the three dimensions of sustainability:

1) ***Environmental (Planet)***
2) ***Economical (Economic well-being)***
3) ***Social (Society)***

+ Animal Welfare

Each field of sustainability is addressed by describing:

1) ***What ASSICA and IVSI have done with and for companies on sustainable development***
2) ***The most valuable «Best Practices» realized by the companies in the sector***
3) ***The tangible commitments undertaken by ASSICA to promote sustainable development in every field of sustainability***
4) ***The 2030 Agenda Goals involved***

In November 2022 the ASSICA Sustainability Program was selected by the European Commission and included in the list of European Codes of Conduct on responsible food business and marketing practices.

SCAN ME

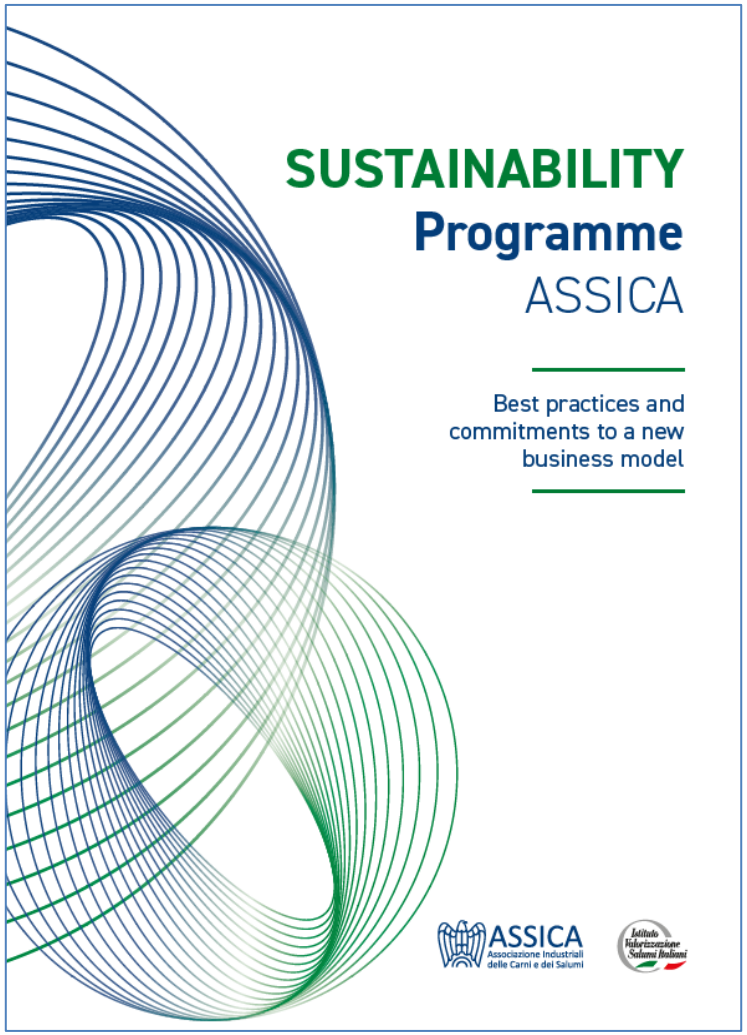
«SUSTAINABILITY PROGRAMME» ASSICA

IN A NUTSHELL … …

This publication is the first collection of best practices, corporate and association commitments and actions towards sustainable development, and a further and tangible step in the path that ASSICA, in collaboration with IVSI, is building together with Member Companies to promote an entrepreneurial approach based on sustainability, understood in all its meanings (environmental, economic and social).

This work must be updated, so as to be able to highlight both the sector's commitments to sustainable development and the tangible results obtained over time.

Indeed, what is underway is a process of acquiring awareness and consequent actions, based on a cultural step-change where sustainability is a business opportunity and not a burden, as a requirement to remain competitive on the market. The evolution of this approach means considering sustainability as one of the central factors, values, of present and future corporate strategies



«SUSTAINABILITY PROGRAMME» ASSICA

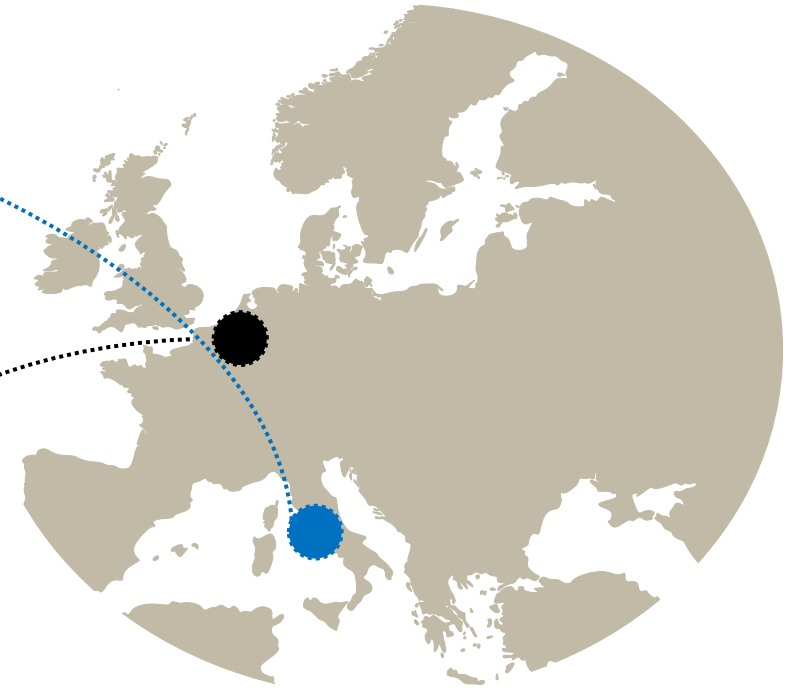
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The Programme was presented in Rome, before the Italian Institutions, on the occasion of the ASSICA 2022 General Assembly.



In the first months of 2023 the publication was presented in Brussels to the attention of the European Institutions.





«SUSTAINABILITY PROGRAMME» ASSICA

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Environmental Sustainability

- Emission's monitoring with regards to plants at all levels
- In-house biogas plants collecting waste and former food products from slaughtering and farm
- Projects and synergies with universities, focusing on the reuse of processing "waste" in pet food production
- Analysis to track origin and quantity of waste in order to identify areas for action



Economic Sustainability

- R&D for innovative solutions aimed at:
  - Reducing the use of plastics
  - Scaling back the environmental impact of end-of-life packaging

SOME COMPANIES BEST PRACTICES



Social Sustainability

- Establishing worker welfare, training and collaborations with territorial nonprofits organization
- Disseminating the culture of sustainability outside and inside the company



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Environmental Sustainability

1. Made Green in Italy: the Italian version of the Carbon footprint
2. Circular economy and reduction of production waste
3. Use of low impact energy sources: “consume less, produce better



Economic Sustainability

1. Reformulation and nutrition
2. Sustainable packaging



Social Sustainability

1. Training
2. Ethics tradition and territories

Animal Welfare

1. Animal welfare on the farm
2. Animal welfare during transport
3. Animal welfare at slaughter
4. The fight against antimicrobial resistance
5. ClassyFarm

SOME ASSICA COMMITMENTS



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Thank You For Your Attention

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https://www.assica.it