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The Grocer Guide to...

**The
Grocer**

Oils



Analysis

Balancing on a slippery slope

The edible oils category continues to come under pressure as macro forces take their toll on volumes. However, inflation is keeping value performance upbeat



➡ To say that edible oils are under pressure is something of an understatement. Hit by drought in the Mediterranean, the ongoing conflict in Ukraine and soaring prices, the category is having to deal with some tough hits – and the pressure looks likely to continue to mount across 2024.

In Spain, in particular, two consecutive bad harvests for olive oil, where production has approximately halved in 2022 and 2023 vs previous years¹, have taken their toll on a country that accounts for 70% of European Union's and 45% of the entire world's olive oil consumption².

Filippo Berio UK chief executive Walter Zanré says the olive oil industry is facing another very tough year. "The supply situation for 2024 is going to be more difficult than 2023," he says. "Spain has had another poor crop and

we are coming into 2024 with almost a complete absence of carry-over stock in the Mediterranean. The current forecast for 2023/24 production is 2.4m tonnes (t), with consumption running at approximately 3m tonnes, leaving a potential 680,000t shortfall – which equates to two months of global consumption.

As a result, he says, there will be a shortage of olive oil during Q4 of 2024 and the "inevitable economic forces" will come into play, driving up prices. He points to the increase already seen since this time last year, with extra virgin olive oil at €4,500/t in January 2023, but now doubled to €9,000/t and rising in January 2024.

Farchioni Olii export manager Marco Farchioni agrees that the olive oil market may remain under pressure until the end of 2024, as it faces

significant challenges, weighed down by supply constraints and inflationary pressures. "This could result in further price increases, which could pose significant challenges to consumers and businesses within the industry," he says. "In 2025 we could see a cheaper market, but with fewer consumers who have now switched to seed oils. So it is imperative that we take action now to mitigate the effects of these pressures and ensure the long-term viability of the olive oil industry."

Meanwhile, Spanish company Acesur agrees that ongoing pressures and inflationary forces are leading to substantial price increases. "The market will continue to be very volatile and will require week by week analysis," says international commercial director Juan González. "We do not see any improvement



in price in the short- to mid-term. Weather, consumption patterns and harvest will be pivotal in determining any long-term price decreases.”

Going back to 2022, Jeremy Gibson, marketing director at Italian brand Napolina, retraces the events leading up to the current predicament for olive oil. He says the dry weather during the late spring months and into summer decreased the expected olive oil crop size by as much as 50% and price points have responded to this reduced output accordingly³, with oil prices rising significantly throughout the year.

Then, in 2023, the April heatwave caused significant damage to blossoms, whereas rains in the second part of May benefited trees, but reservoirs remained at historically low levels. The protracted heatwave in July and August in Spain exacerbated the

effect of the long-term drought with further heat in October. “Although the crop for the new season will be better than last year, this is still lower than previous harvests due to recent floods in Italy with some crops impacted. In the coming weeks and months, further details on this crop will materialise as the harvest process begins.”

As much as we would like to have a crystal ball and know what the future holds for extra virgin olive oil, the short answer is that we don’t know for sure, says Giovanni Quaratesi, head of corporate global affairs at olive oils supplier Certified Origins. “With the news of climate change causing the second consecutive crop failure in Spain, the country responsible for approximately 50% of global olive oil production, and the low remaining inventory from last year, market

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prices at origin – and consequently on retail as well – will continue to stay substantially high, at least for the first half of 2024, when farmers and large producing countries like Spain, Italy and Tunisia will start to release their first forecasts on the 2024/25 crop.”

In non-producing countries that import the majority of the EVOO produced in the Mediterranean – such as the UK, US, Brazil and Japan – consumers will be affected the most by price increases, he adds.

Macro impact

Beyond the clear stresses imposed by poor olive oil harvests, global events are exacerbating the impact on the edible oils supply chain and, consequently, on prices.

Sime Darby Oils points to heightened volatility for vegetable oils, including olive oils, in the face of changes in global weather patterns. Ongoing uncertainties in the Black Sea and Middle East, coupled with geopolitical factors are further complicating the market dynamics, says the company. “Simultaneously, the surge in global biodiesel demand intensifies competition for vegetable oils, contributing to market pressures, especially for olive oil,” it adds. “Looking ahead to 2024, the combined impact of these factors suggests continued volatility.

“In terms of pricing, the current upwards trend in price volatility may persist, driven by supply constraints and heightened demand,” it adds. “Monitoring market adaptations and potential mitigating factors is crucial for industry stakeholders in navigating these challenges.”

In terms of other oils, Zanré reports that vegetable oil is stable with volume down just -0.2% and value up 38.5%, while sunflower oil volumes are down by -28.5%, due to the ongoing situation in Ukraine, although value is up 5.7%⁴.

In total, the oil category has lost 25m litres in volume between 2022 and 2023⁵, although value has soared from £435m to £502m⁶, with vegetable oil being the biggest beneficiary of that surge.

The war in Ukraine and Russia drastically reduced the availability of sunflower oil, coming in large part from these areas, driving up the demand and price for refined olive oil, which now trades almost at the same level as EVOO, says Certified Origins’ Quaratesi.



“The news of the first crop failure in olive oil production in Spain in late 2022/early 2023, made the cost of EVOO, as well as refined olive oil, go up quite quickly,” he says. “In 2023, to fill the gap in volumes missing from Spain, large global players started purchasing campaigns in Turkey, Tunisia and Morocco, driving the cost up for local communities. The response from some of these governments was to halt all exports, to protect local markets and allow their own citizens to afford their own production.

“With both olive oil categories now (in 2024) trading on average 80%-120% higher than two years ago, we would expect some food industry players to go back to other seed oils such as rapeseed and vegetable oils for baking, frying and other industrial preparations.”

Napolina is one brand (among others) that has innovated in the face of short olive oil supply, with the introduction of Olivo da Cucina, a blend of seed

and olive oil, “allowing consumers to continue to enjoy their olive oil cooking experience and offering a great value price proposition” as now, the average price for olive oil is £8.92 per litre vs £6.04 during the same period last year⁷, says Gibson. “The new 1L oil has an RRP of £6 in stores and gives shoppers a quality product with high availability, using trusted suppliers, with no alteration to flavour or taste profiles, at a more affordable price.”

However, not everyone involved in the olive oil industry is happy about the development of blends.

“In retail, people who love EVOO will stick to it, but we are seeing the appearance of a mix of seed oils and EVOO on the shelf, that can and will create confusion,” says Certified Origins’ Quaratesi. “We are completely against this. A bottle that displays the words olive oil or extra virgin olive oil on the label but, in fact, contains just a small percentage of healthy olive oil



Inspiring home cooking

Home entertaining and experimenting with food at home are trends which have helped olive oil brands to challenge the way consumers interact with their products and switch from unhealthier fats, says Acesur's González. "Speciality oils to 'finish' dishes and enhance flavours are favourites to enjoy and surprise guests at home. Truffle olive oil remains the winner of all the options available. Healthy ingredients are rapidly gaining popularity – in particular, avocado oil and avocado & extra virgin olive oil – due to their mild flavour and health benefits and versatile

usage in cooking and salad dressing."

Increased home cooking has significantly contributed to the continued growth in sales across all oils, says Sime Darby Oils. "As more consumers embrace cooking at home, there has been a notable surge in demand for a variety of cooking oils to cater to diverse culinary preferences." The company cites certain speciality oils that continue to resonate strongly with consumers: avocado oil, known for its health benefits, rich flavour and high smoke point; peanut oil, valued for its distinct taste and

suitability for high-heat cooking; and sesame and coconut oils, celebrated for their unique flavours and versatility.

Farchioni agrees that the surge in home cooking has boosted overall oil sales, and points to avocado, peanut, sesame and coconut as popular consumer choices, "aligning with the growing trend of diverse and health-conscious cooking practices".

While he acknowledges that Farchioni Olii cannot sell seed or avocado oils, he says cooking tasty dishes is "undoubtedly more accessible with a few drops of our olive

oil. Selling revolves around understanding how to transform a standard dish into outstanding cooking by incorporating a few drops of fresh EVOO before serving."

Oils are an integral part of the home cooking category, especially within Italian cuisine, says Napolina's Gibson. "Eaten on 3.4bn occasions annually, Italian cuisine is the UK's favourite and still the number one choice come dinner timeⁱ. Consumers perceive Italian cuisine to be tasty, filling and varied, with 72% enjoying the taste of Italian meals compared to 67% for total main mealsⁱⁱ.

and is made in its majority with heavily processed seed oil cannot be good news for the category and will mislead individuals and families.

"A shared effort to absorb costs, along with transparent communication and clear labelling by players such as ourselves towards retailers – and from retailers to the public – will be key in maintaining trust in the category and surviving these difficult times."

Filippo Berio's Zanré agrees that the introduction of blended oils "using 85% vegetable oil and 15% olive oil" is misleading to shoppers who "think it's a cheap option for olive oil when in reality it's an expensive vegetable oil", he says, adding that he believes this will damage the olive oil category. "Blended oil [like this] is selling in Asda for £6.50, so it's an expensive way of buying rapeseed oil." This compares to a litre of extra virgin olive oil in Sainsbury's or Waitrose selling at £13.85 (or £12.05 for 1L of olive oil).

Consumer purchasing habits

Despite soaring prices for olive oil, in particular, consumers appear willing to continue to spend and the inflationary environment is keeping the value performance high.

Farchioni says economic considerations are influencing a shift in consumer preferences towards more affordable alternatives, such as sunflower, rapeseed and vegetable oils, leading to significant changes in purchasing patterns. "However, for those who prefer EVOO, the question remains – how long can they continue to afford it?" he says. "The replacement options are abundant, including seed oils, butter, avocado oil or fake chemical fats. It is crucial to evaluate the benefits and drawbacks of each option to make an informed decision that aligns with your health and budget."

Acesur's González says there has been a notable trend for UK shoppers

to opt for lower-priced alternatives such as sunflower, vegetable and olive oil blends. "These oils are more budget-friendly and a good alternative for customers seeking a cost-effective option," he says. "Despite ongoing supply pressure and inflation, olive oil has retained its popularity for those customers prioritising flavour and health benefits. The market is dynamic."

Health benefits and culinary versatility are keeping olive oil popular despite potential price increases, and demand remains robust, particularly among consumers prioritising quality and premium cooking oils, says Sime Darby Oils. However, consumer preferences are shifting towards lower-priced alternatives such as sunflower, vegetable and rapeseed oil, influenced by economic considerations.

Meanwhile palm oil, although a significant player, continues to come under increased scrutiny due to sustainability concerns. Industry

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efforts to promote sustainable practices are impacting consumer choices, highlighting a growing awareness of environmental considerations, adds the company. Meanwhile, speciality oils with unique flavours or health benefits are continuing to carve out a niche market – such as avocado oil for health or sesame oil for a distinct flavour.

Individuals and families who see EVOO and other olive oil products as beneficial to their health or who have a strong cultural bond to these ingredients will still use them for cooking and dressing in their everyday diet, says Certified Origins' Quaratesi. Even a 'heavy' user of olive oil can still make a litre last quite a long time, making the extra cost manageable across the year.

With its heavy credentials to the Mediterranean diet and the rise in scratch cooking, the demand for olive oil remains strong, says Napolina's Gibson. "However, consumers are opting for reduced quantities," he says.

The pressure of own-label oils on the sector (see side panel) is an undeniable trend noted across almost all categories, he adds, but notes that consumers will still turn to brands that are distinctive, can assure quality and with which they can feel affinity.

However, Filippo Berio's Zanré says the worrying aspect is the long-term damage being done in the UK market to an olive oil category that has taken years to build. Household penetration has returned to 48.5% (September 2023), equating to the levels seen back in January 2009 and August 2012 (48.4%)⁸, he reveals.

Changing formats

There is a discernible shift towards smaller formats, particularly 250ml and 500ml as well as spray formats, says Sime Darby Oils. "This trend is notably driven by the desire for cost-conscious purchases and a growing awareness of sustainability," it adds. "By staying attuned to these preferences, Sime Darby aims to cater to the evolving needs of our customers, offering not only quality oils but also choices that align with their budget constraints and sustainability goals."

Not only are shoppers trading into smaller formats, but the supermarkets are also substituting larger formats because of the very high shelf price,



says Filippo Berio's Zanré. For example, 750ml is being substituted for 1L. "The only format showing year-on-year growth is 250ml," he notes. "However, against this backdrop there remains the concept of 'bigger pack, better value', which is important to heavy olive oil consumers and is one of the reasons why 1L EVOO continues to be one of the top-performing SKUs in the category."

In terms of volume per trip Zanré says the 1L formats are showing the greatest decline (-22%), followed by 750ml (-17.9%) and 500ml (-4.5%) compared to the 250ml format at +3.9%⁹. "Some of this will be promotionally driven, but it will also be down to shoppers managing food budgets," he adds. "Shoppers are very aware of the price per ml."

Eighty-two per cent of UK households tried to reduce food bills in response to the cost-of-living crisis in 2023, up 16% on the previous year¹⁰, says Acesur's

González. "Budgetary constraints have influenced and will continue to impact grocery purchase, cooking and dining decisions across various consumer groups – from those embracing small kitchen hacks to those overhauling their entire dietary approach," he says. As such, "smaller formats are perceived as cost-effective, allowing consumers to manage their expenses more efficiently and are also convenient for consumers who may have limited storage space or who want to try different types of oils without committing to a larger, more expensive quantity."

"Spray formats offer the ability to portion control and minimise waste – and give great results when used with air fryers," he adds.

There has certainly been a switch to smaller pack formats and, as a result, Napolina has increased distribution of smaller bottles to allow consumers to continue to buy a product they love at a more accessible price, says Gibson.



Competition from own-label oils

Napolina's Gibson says own-label prices have risen significantly over the past year as the price of the raw material has increased, with shoppers trading into other oils such as sunflower and blends. "Shoppers still have not seen the full extent of the market movement until recent weeks due to the seasonality of products – especially as the average shopper only replenishes their oil four times a yearⁱⁱⁱ," he says. "However, shoppers may have felt the impact in December as demand remains high at Christmas time."

Own-label olive oils have gained traction

as an attractive option for consumers seeking cost-effective alternatives without compromising on quality, says Sime Darby Oils. "The aggressive pricing strategies employed by retailers for their own-label products have intensified competition, prompting consumers to re-evaluate their purchasing decisions," notes the company. "The pressure is particularly evident in the mid- to lower-priced segments where own-label offerings often directly compete with branded products."

Looking at own-label/private-label olive oils, which are

bringing competition to brands, Filippo Berio's Zanré believes that these have not yet reflected the true increased costs of olive oil and, as a result, have increased market share. However, he expects significant inflation in private-label retails early this year as the new season contracts work their way through the supply chain. Notably, he comments that consumers trading out of or away from the olive oil category is more concerning than them trading down to private-label products.

Farchioni, meanwhile, calls on "all stakeholders in the olive oil industry" to note that the surge

in demand for own-brand olive oils is causing a ripple effect throughout the sector. "The current state of supply and demand has reached a critical point of concern and, if left unchecked, could lead to further imbalances that could potentially destabilise the entire market," he warns. "The tipping point has already been reached, with prices jumping from £10 to a staggering £15. The situation is dire and requires attention from all parties involved. Let's work together to find a solution that will ensure the stability and long-term viability of the olive oil industry."

"There will always be a market for larger bottle formats; however, the small sizes allow consumers to make savings on their household staples at a time when weekly budgets matter most," he notes.

Farchioni agrees that British consumers have shown a clear preference for smaller sizes and spray options to manage costs and reduce waste. "And who can blame them?" he asks. "In today's world, convenience and affordability are paramount when making purchasing decisions. So it's no surprise that the 500ml option stands out as a popular choice for those looking to save money without sacrificing quality."

However, format size really depends on the profile of the consumer, says Certified Origins' Quaratesi. "If you add a little EVOO in your cooking, then a smaller format will be the best option to preserve the freshness and the health properties, until the next grocery run," he says. "However, if you are a big lover

of EVOO and use it in most dishes, then probably 1L or even larger formats are the way to go to get the best value/litre ration and use less packaging or generate less waste."

Challenges and opportunities

The year ahead promises to be another challenging one for the edible oils industry, and suppliers are warning that companies in the category need to remain alert to any market volatility. However, many are also optimistic that, amid the turbulence, there is opportunity for education and growth.

"EVOO companies need to stay true to their mission and not compromise on quality and/or use misleading marketing practices to save some cents," says Certified Origins' Quaratesi. "Reputation and trust take years to build and seconds to fall apart. EVOO is recognised by hundreds of studies as a healthy food, naturally rich in substances that fight

physical inflammation, cancer and even brain diseases. With the cost of this ingredient going up, there is an opportunity to lift it from being perceived as a commodity to almost a natural medicine in the 'good for you' category.

"In this ever-changing scenario and long period of financial and political instability, being flexible, having a back-up plan and speed in reactions are going to be key to opening new business opportunities and maintaining existing relationships."

The global supply chain will be the main challenge in 2024 – from transportation issues, product availability and the cost of raw materials, says Acesur's González. "However, olive oil is a traditional product that has gained popularity and sales over the last few years, so there is still a big opportunity in the market to open up and extend the range of products," he notes. "International

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trends in cuisine have exploded, with all sorts of different condiments and ingredients; olive oil is a key base ingredient in the kitchen and has much to offer. We believe we have a huge opportunity to contribute with new innovative products and formats that help to achieve the perfect result.”

In similar vein, Napolina’s Gibson believes the resurgence of blended oils for cooking will be a key opportunity to allow customers to have the flavour profile of an olive, and the cooking profile of a seed oil, at an affordable price point. “Educating consumers on oil is essential this year,” he adds. “We’re keen to help inform our customers on where and how to use different oils – especially olive oil – effectively across various cooking and dressing techniques, taking inspiration from Napolina’s Neapolitan roots. This is especially important when you consider... that over 80% of shoppers simply buy the oil that they are used to, as they don’t know what oil to use for which type of cooking”.

“Opportunity will also come in listening to customer demand. For example, Napolina has launched a new spray bottle format in 200ml size, costing £2.75 (RRP). This offers consumers a health-conscious option that allows for precise portion control, which is ideal during the cost-of-living crisis and making products go further and last longer, while still being able to enjoy the same great taste.”

Sime Darby Oils identifies challenge and opportunity in several areas. Regarding palm oil sustainability and consumers’ environmental concerns, it notes the increasingly stringent requirements make it harder for the company to source from smallholders, who account for 40% of global production. “Meeting those expectations while maintaining affordability poses a challenge,” it says. However, with sustainable practices ingrained in its principles, the company believes this serves as a distinct marketing advantage.

Meanwhile, health and wellness trends necessitate a continued focus on oils with perceived health benefits, adds the company. “By consistently innovating and promoting the health attributes of our oils, including their high nutritional content and suitability for various diets, we position ourselves



at the forefront of the wellness trend.”

And finally, despite ongoing global uncertainties posing a risk to the stable supply of oils, Sime Darby Oils believes its integrated supply chain is its strength. “Exploring diverse sourcing strategies and adopting agile business models are integral components of our approach... mitigating the risks associated with disruptions and positioning us to maintain a consistent and dependable supply.”

Inflation, inflation and availability are the three challenges that the category faces in the year ahead, says Filippo Berio’s Zanré. “The category has lost 15% volume in 2023 year on year and we forecast another 10% decline in 2024”¹². He reiterates his concern over the decline in the consumer base and household penetration and forecasts a real pinch point for the second half of the year, as supplies run out.

As he looks ahead to the next year, Farchioni says the edible oils category is poised to face a number of challenges. “Supply chain disruptions, heightened competition and shifting consumer preferences are all factors that we must prepare for,” he says. “Fortunately, we see these challenges

as opportunities for innovation, sustainable sourcing and strategic collaborations. For over 5,000 years, extra virgin olive oil has been a staple in many people’s diets. And with good reason: it’s not only delicious, but can also be beneficial for heart and mind health. However, maintaining the quality and taste of our products is crucial as is ensuring they are sold quickly enough to stay fresh.

“But perhaps the biggest challenge we face is building trust with our customers. They rely on us to provide them with high-quality products, and we take that responsibility seriously. We believe in our consumers, and we hope they believe in us too.

“By working together and staying focused on our goals, we are confident that we can overcome these challenges and continue to provide our customers with the best possible products.”

Sources

¹ <http://tinyurl.com/yu47ujhf>

² <https://www.bbc.co.uk/news/world-europe-67565503>

³ Global Oils Report

⁴⁻⁶ Kantar Worldpanel data, MAT to 03.09.23

⁷ Kantar, L4 w/e 28.10.23

⁸ Kantar Worldpanel, data to 03.09.23

⁹ Nielsen, MAT to 04.11.23

¹⁰ Retail Connections, <http://tinyurl.com/bdfsrnx3>

¹¹ Kantar, 26.11.23

Inspiring home cooking

¹² Kantar, Italian Usage Review, September 2023

Competition from own-label

¹³ Kantar, 26.11.23

Sime Darby Oils

Palm oil free? Don't believe the hype

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KEY PRODUCTS

Plant-based frying oils
 Plant-based bakery oils
 Plant-based bulk oils

As the world's largest producer of sustainable palm oil, Sime Darby Plantation is offering some "much-needed perspective on what 'Palm Oil Free' really means", it says. "For palm oil to be sustainable, it has to be certified by the Roundtable on Sustainable Palm Oil (RSPO). This means producers must adhere to strict, no deforestation, no peat and no exploitation (NDPE) policies. 'Palm Oil Free', on the other hand, uses a combination of uncertified, alternative crop oils.

"To get the same yield from alternative crop oils – like soybean, coconut or sunflower oil – you'd need between 4 to 10 times more land, which means greater degradation of animal habitat and biodiversity. But don't just take our word for it; organisations like WWF, Chester Zoo and the World Association of Zoos and Aquariums have publicly supported the idea that sustainable* palm oil can contribute to sustainability, if managed carefully."



“Bodies like WWF and Chester Zoo publicly support sustainable palm oil”

Sime Darby Plantation, owner of Sime Darby Oils, is a member of the RSPO. "In the UK, Sime Darby Oils has fully traceable and transparent supply chains, published and monitored certified practices, plus 47,000 ha of land with conservation and biodiversity value, bolstered by a program to reforest 3m indigenous trees," it says. "If you want a transparent, fully sustainable supply chain, then choose sustainable palm oil."

* Around 93% of all palm oil imported into the UK and Europe is certified sustainable, yet most of the public are still unaware of this.

Palm oil with a conservation agenda

**NOT ALL
 PALM OIL
 IS CREATED
 EQUAL.**



Learn more

Sime Darby Oils

Realising possibilities, together

Acesur

Staying close to consumers

DETAILS

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KEY BRANDS

La Española
– Extra Virgin Olive Oil
– Organic Extra Virgin Olive Oil
– Olive Oil
– Light In Colour Olive Oil
– Gourmet Olive Oil
– Olive Oil flavoured with White Truffle
– Olive Pomace Oil
– Olive Pomace Oil & Sunflower Oil Blend
– Sunflower Oil & Extra Virgin Olive Oil Blend

La Española continues to be the No.1 Spanish olive oil brand and the fastest-growing choice for extra virgin olive oil (EVOO) in the UK¹, says Acesur international commercial director Juan González. “As a global leader, we have an enormous responsibility to continue making progress in our class-leading vertical integration,” he notes. “By the end of 2023, we completed our latest olive grove extension, adding hundreds of additional hectares of land and new plantations of olive groves. This was supported by the opening of our new Jabalquinto mill in Jaén, powered 100% by clean energy, extending our commitment to sustainability.”

Sustainable packaging innovation is key to Acesur’s expanding product range, he says. “From glass and pop-up pouring spouts to aerosol-free sprays and tin cans, sustainability sits at the forefront of every new development.”

Supporting consumer needs

While olive oil is gaining popularity among consumers, La Española offers products based on every use and type of cooking, adds González.

“Olive oil continues to be part of the ‘superfood’ trend and, as producers, our innovation is centred around health-orientated concepts, such as antioxidant olive oil, olive oil with vitamin B12 for vegans and oleonic acid olive oil. Our objective is to genuinely contribute to the wellbeing of our consumers.”

Providing culinary solutions

Acesur continues to expand its range by understanding the way consumers cook and offering culinary solutions that improve results – such as light olive oil for desserts or deep frying; air fryer vegetable oil spray to obtain crispy food; truffle olive oil to enhance flavours and offer a luxurious touch.

In line with the recent trend of using air fryers in kitchens, the company is expanding its range of spray oils to include flavoured sprays for air fryer usage and other cooking occasions such as wok and bbq.

Jabalquinto Mill in Jaén



“By the end of 2023, we completed our latest olive grove extension and opened our new Jabalquinto mill in Jaén”

Educating consumers

When it comes to marketing, education is one of Acesur’s main goals, notes international marketing manager Carla Alonso. “To achieve a higher level of understanding among consumers, we need to be close to them,” she says. “A mix of trade marketing campaigns and experiential actions, such as sampling, have played a crucial role in educating our customers. Our plan this year is to continue positioning our products so that customers can make optimal choices at the point of sale.

“We study consumer habits to select the best mix of channels and the relevant messages for our audience,” she adds. “Digital is a great channel for the brand to reach our current base and potential consumers. But personal contact remains really important, so partnerships like Foodies Festival provide successful activations where consumers can learn about and become closer to our products.”



Source

¹ NielsenIQ, UK Total Market, Oil Category, MAT 2 w/e 21.10.23



Experience 100% Spanish



Capture the essence of Spain with every drop.

La Española continues to be the #1 Spanish olive oil brand and the fastest growing choice for Extra Virgin Olive Oil in the UK.*



Indulge your senses into the exquisite world of Spanish olive oils, where tradition meets innovation.

Our olive oils are available in a variety of formats, from 250ml to 5L plus aerosol free sprays, to suit every retailer, every customer and every budget.

www.laespanolaoliveoil.co.uk

*Source: Nielsen Total UK Market Coverage MAT2 w/e 21 Oct 2023



Certified Origins

Quality and traceability

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KEY BRANDS

Bellucci – Premium
Italian EVOO
Seggiano – Artisanal super-
premium Italian foods
La Bien Planta –
Premium Spanish EVOO
and ingredients
Private label



Certified Origins emerged from a collaborative effort between two large cooperatives of Tuscan olive farmers, and a globally-oriented partner. Their collective dedication to producing fresh, authentic extra virgin olive oil (EVOO) was the foundation that brought the company to life, explains head of corporate global affairs Giovanni Quaratesi.

“From these roots, Certified Origins has grown into a global leader in the production of premium EVOO, and is committed to delivering the highest-quality olive oil products while promoting authenticity and responsible sourcing,” he says. “This journey of growth and excellence has led to expansion into the UK, following the acquisition of Seggiano, a leader in the Italian/premium food sector. This both strengthens the company’s presence in Europe and marks our dedication to making high-quality EVOO accessible to a broader audience.”

Strengthening distribution

Certified Origins has been an important player in the European market for over a decade, particularly through its private-label offerings, says Quaratesi. The company produces, bottles, and ships from 10 different production plants and can deliver in four to eight weeks anywhere in the globe. “Our portfolio of high-quality products keeps growing and so do our sourcing and distribution channels,” he says. “We work with some of the largest retail groups in the world, generating important volumes, while our logistics infrastructure



“Certified Origins has grown into a global leader in the production of premium extra virgin olive oil”

allows us to maintain a complete focus on our customers as well as the flexibility to fulfil last-minute requests.”

By enhancing its UK presence, the company is set to leverage local market insights and logistics skills, ensuring that its products are widely available and delivered with the freshness and quality its clients expect, he notes.

Emphasising traceability

As food prices soar, traceability is vital to reassure partners and their customers that they are receiving the best value for their investment, adds Quaratesi. “Certified Origins is a forerunner in implementing third-party traceability measures by investing in ISO22005 certification and Oracle Blockchain technology to track each shipment and reduce the risk of manipulation of information at source,” he says. “These measures assure the quality of our EVOO and inspire a sense of trust and transparency with consumers. Every step of our supply chain is recorded, with precise timestamps marking the start and end of each production batch.

“Proactive investment in advanced technologies and certifications ensures every bottle of EVOO can be traced back to its source. Everyone should know where their food comes from, so this helps us increase transparency and fight food fraud – and is why our goods are fully traceable.”



**Certified
Origins**

Quality Foods
Traceable Sources
Authentic Origins

GLOBAL LEADER OF HIGH-QUALITY PRIVATE LABEL OLIVE OIL

TRUSTED SOURCES FOR YOUR BRAND

We bring the taste of natural Extra Virgin Olive Oil to retailers and distributors all over the world with a sustainable and transparent supply chain



Certified Quality

as the major player third-party certified as ISO 22005, with unrivaled customer service.



Certified Sustainability

sustainable production, with a focus on protecting the land and its unique qualities.



Certified Traceability

using Oracle blockchain technology and third party certifications to track every step from field to fork.

Certifiedorigins.com

info@certifiedorigins.com

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Farchioni Olli S.p.A

Safeguarding our olive heritage

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KEY BRANDS

**Il Casolare Unfiltered
Extra Virgin Olive Oil**
**Il Casolare Organic
Extra Virgin Olive Oil**
Il Casolare Olive Oil

As a leading Italian company in the food sector, Farchioni Olli recognises the importance of addressing global challenges beyond its market. “Real innovation lies in the complete supply chain,” says export manager Marco Farchioni. “So, we have adopted a modern and efficient approach to production that covers the entire process from field to table.”

To achieve this, Farchioni offers special extra virgin olive oils (EVOOs), including: PGI Puglia, PGI Toscana, PDO Umbria and its unique ‘Olivicoltura Eroica’ selection. This supports a sustainable approach to olive-growing that aims to revive abandoned olive trees.

“The ‘Olivicoltura Eroica’ project was born to safeguard and promote Italy’s olive-growing heritage,” explains Farchioni. “Seven pioneers of the olive-growing world have joined this project, inspired by the Farchioni family’s motto – ‘The future is in our roots’ – which has been the driving force behind its activities since 1780. Farchioni Olli, being a large company, brings history, experience, expertise, and resources to the project, which aims to recover olive trees that have been neglected for centuries.”

The innovative project focuses on recovering olive trees grown in challenging or ‘heroic’ environments, such as steep slopes, terraces, small islands, or those above 500 metres. Heroic olive groves, therefore, are classified based on these specific



“We have adopted a modern and efficient approach to production that covers the entire process from field to table”

landscapes or are over 100 years old.

To ensure the success of this project, the Farchioni family signed a supply chain agreement with a group of heroic olive growers from the most suitable Italian regions, including Tuscany, Umbria, Lazio, Puglia, Campania and Sardinia. The olive growers involved comply with formal protocols that ensure the quality standards of the final product. This initiative has become a distinctive and valued creation for the national olive movement.

Prioritising consumers’ wellbeing

“In addition, our marketing goal is to educate our consumers to choose high-quality products that prioritise their health,” adds Farchioni. “As part of this effort, we have launched a new campaign that invites consumers to eat well and stay fit through a competition. They can win an electric bike, as featured on the page opposite.

“We prioritise our consumers’ health above everything else as we believe this builds long-term trust,” he notes. “In summary, we strive to produce high-quality and delicious products at affordable prices for everyone. Every day, we work to maintain our recipe’s integrity and prevent anything from compromising it. And we encourage our consumers to support our commitment to preserving and promoting our national agricultural heritage.”





Il Casolare[®]

Eat Well, Stay Active!

Naturally cold pressed and produced with no added chemicals, when incorporated into a healthy lifestyle and diet, the Il Casolare Unfiltered Extra Virgin Olive Oil continues to offer customers the very best without compromising on taste and flavour.

With 50% more antioxidants than filtered oils, enhance your product selection with an olive oil that aligns with the health-conscious consumer and add a healthy boost to New Year sales.

Win an Electric Bike

Every bottle of Unfiltered Extra Virgin Oil will be delivered with neckties containing instructions on how to enter!

Guaranteed
minimum of
winners

2

If no bikes are won through the online scratch card then a prize draw will be held to ensure 2 bikes are won. Competition ends 30th April 2024



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ASDA

cocado

TESCO

Sainsbury's

 oliofarchioni.com/en

 [farchioni1780uk](https://www.instagram.com/farchioni1780uk)

Filippo Berio

Great-tasting health boost

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 Marketing Manager

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Filippo Berio Olive Oil
Filippo Berio Flavoured Oils
Filippo Berio Pesto
Filippo Berio Pasta Sauces
Filippo Berio Vinegars

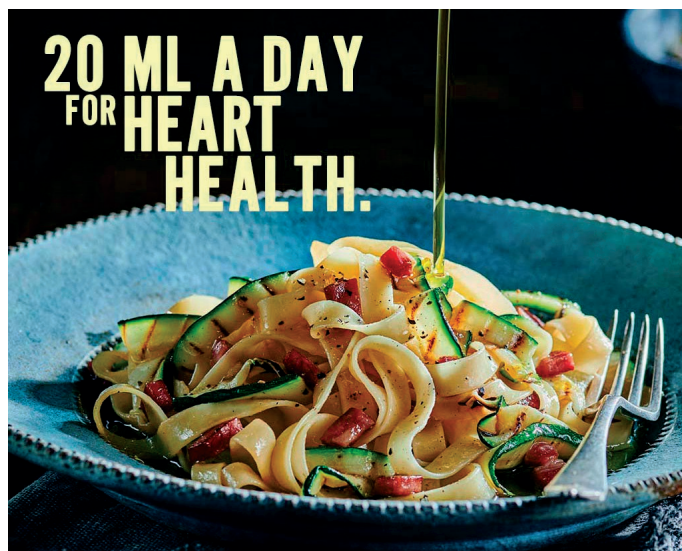
👉 Olive oil has long been celebrated for its numerous health benefits and is a fundamental component of the Mediterranean diet. Health associations range from anti-inflammatory effects, thanks to the antioxidants present in extra virgin olive oil (EVOO) – also associated with cancer prevention – to reduced risk of heart disease, being rich in monounsaturated fats.

Health is such a motivator and is often cited as the reason why people start using olive oil. This association with health is widely accepted, but while there have been many studies demonstrating these health benefits, there is in fact very little causal scientific evidence. According to The British Heart Foundation, the top three causes of death are cardiovascular disease-related: heart disease, strokes, chronic obstructive pulmonary disease¹. The challenge is that heart disease takes many years to manifest itself and, by then, it is often too late.

Filippo Berio has worked with Glasgow University, using a new pre-symptomatic research methodology to create biomarkers that measure heart health and can detect tiny levels of change. During the study, participants consumed 20ml of assorted edible oils each day and biomarkers were taken at the beginning of the trial, after six weeks and after 12 weeks. Dr Mullen from Glasgow University says: “The results were spectacular. Both EVOO and olive oil produced significant improvements after only six weeks. Links between diet and good health are notoriously difficult to prove. This latest breakthrough in biomarker technology is finally changing that.”

Go the extra ‘ml’ for heart health

Armed with this scientific proof, Filippo Berio has worked with nutritionist Linda Vezzoli to create easy ‘Health Boost Hacks’ to incorporate 20ml of olive oil into your daily diet. “Adding olive oil to your dishes is very natural in Mediterranean countries, where most meals are finished with a couple of ‘circles’ of olive oil, not so much in the UK,” says Vezzoli. “Working with Filippo Berio, I’ve tried to create some



“Our #20mladay campaign focuses on health and quick hacks to improve the nutritional value of dishes”

easy concepts for adding 20ml of olive oil to all types of meals, from breakfast smoothies, to popcorn coatings.”

“Our #20mladay campaign focuses on health and quick hacks to improve the nutritional value of dishes,” says Lisa Mullins, marketing manager at Filippo Berio. “We’ve had a great reaction to the campaign, which launched at the prestigious Italian Embassy, and it will continue to be a core theme in 2024.”

While the olive oil industry is facing huge challenges, Filippo Berio remains uncompromising in its commitment to quality and supporting the category. “Our in-house laboratory guarantees authenticity and organoleptic testing to ensure we maintain our award-winning quality,” says Walter Zanré, Filippo Berio’s CEO. “Every batch of oil is thoroughly tested before being approved for sale.” This, along with the company’s unique history and ongoing support will be central to the brand’s endurance in a difficult year ahead.

Source

¹ <http://tinyurl.com/4d3h9vc2>

QUALITY COUNTS.

A proven commitment to quality reassures customers.

- **Tried and Tested** – Filippo Berio Olive Oils undergo 30 rigorous tests during the most important 4 stages of the production process
- **Backed by Science** – industry leading chemical and organoleptic tests ensure authenticity and flavour
- **A Passion for Olive Oil** – backed by over 150 years of knowledge and heritage
- **A Trusted Message** – from a respected Italian brand

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or 07510 591022.

Filippo Berio

His signature. Our promise.



Napolina

'Not So Humble' ingredients

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Marketing Director

KEY BRANDS

Napolina

Last year Napolina invested in a £3m marketing transformation to challenge the common misconception that staple ingredients such as oils are the 'support acts' in home-cooked meals. "This new positioning celebrates the quality of the brand's 'Not So Humble' ingredients and uses humour and hyperbole to champion itself as the only Italian brand worth buying," reveals Napolina marketing director Jeremy Gibson. "To date, this campaign has improved brand awareness by 10%¹ and is proving a real hit with consumers," he says.

"Napolina has also attained its highest-ever brand awareness score of 90% – significantly higher than those of competitors – with desirable campaign results regarding brand equity and perceptions². We'll continue to support this campaign in 2024, and plan to match our 2023 investment. We will continue our out-of-home and Smooth Radio partnership through January, as well as exploring new channels, including TV and digital, to engage consumers and drive brand affinity."

Napolina has seen volume grow by 13.9% and value up 51.2%³, and is the only brand to be in volume growth with own-label also declining⁴, says Gibson. The brand also has the best-selling olive oil products, across all bottle sizes, is recruiting shoppers to the olive oil category over both 52 and 12 weeks⁵. It is the fastest-growing brand on the market in value terms, with the largest market share in two years⁶.

"Napolina's oils and wider portfolio support consumers in home cooking, especially those opting to scratch-cook mid-week meals, date night dinners and restaurant-worthy dishes at home," notes Gibson. "The rise in eating at home has seen a growth of £937m (6%) per annum since pre-pandemic levels⁷ – bolstering the cooking from scratch category like never before. This is further evidenced by Napolina's recently commissioned research, which found that 65% of people are dining out less than they used to, with half (50%) of all those surveyed also ordering fewer takeaways⁸. More strapped for time than before and keen to keep



“According to nearly three-quarters of Brits, ingredients have the power to make or break a meal⁴”

energy bills to a minimum, consumers are seeking simple-to-make, but high-quality dishes that rival what you could find in a restaurant. And, 72% of Brits, say this can only be achieved with good ingredients, which have the power to make or break a meal⁹.”

In response, the brand encouraged cross-category purchase through in-store activations around recipe inspiration, he notes. “These are also being shared in an engaging way across our website and social media channels, to help our audience realise how easy it is to cook restaurant-quality meals at home using Napolina ingredients¹⁰.”

Napolina's latest innovation Olio da Cucina, a blend of seed and olive oil, allows consumers to continue enjoying their olive oil cooking experience while offering a great value price proposition, as now, the average price for olive oil is £8.92 a litre (vs £6.04 during the same period last year)¹¹, reveals Gibson. “The new 1L oil has an RRP of £6 and gives shoppers a quality product with high availability, and no alteration to flavour or taste profiles, at a more affordable price point,” he says. “Also launched in stores just last month is a range of one-calorie sprays in 200ml sizes, costing £2.75 (RRP) and offering consumers an option that is 100% oil at just one calorie per spray. This targets health-conscious consumers across 2024.”



Source

- ^{1,2} MMR Brand Health Study, September 2023
^{3,4} MMR Brand Health Tracking, 27.11.22 to 22.11.23
⁵ Kantar October 2023
⁶ See 3+4
⁷ Kantar, w/e 07.08.22 vs pre-pandemic average 2018/2019
^{8,9} Censuswide research conducted in April 2023, with over 2,000 respondents surveyed.
¹⁰ Global Data, September 2023
¹¹ Kantar, L4 w/e 28.10.23

DAL 1965

Napolina

THE ONLY OLIVE OIL WORTH LISTING

- ✓ Only major brand in volume growth*
- ✓ Fastest growing brand in value*
- ✓ The UK's #1 Italian cooking brand**



STOCK UP ON NAPOLINA *Pronto*

Sources:
*Kantar 52 week to Nov '23
**IRI December 2023

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