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The Grocer Guide to...

The Grocer

Oils



Analysis

Oil's troubled waters

While conflict in Ukraine has taken its toll on sunflower oil supplies, olive oil producers are staring down the barrel of a bleak 2023, with soaring prices already reflecting a worsening supply situation

➔ If ever there was a year when certain sectors of the edible oils industry felt they were on a slippery slope, then 2022/2023 must be it.

Difficulties on both olive oil and sunflower oil have sent ripples across the market, with conflict in the Ukraine in particular disrupting sunflower oil supply, while severe drought in the Western Mediterranean has taken its toll on olive harvests, with a growing shortage of supply as a result.

Meanwhile, a combination of inflationary pressures following on from Brexit and Covid-19 over the past couple of years have also taken their toll on the markets, driving prices up.

The difficulties with sunflower oil have played into the hands of the vegetable oil sector during the past few months, as recent statistics from

Nielsen show. Meanwhile, retail prices in the olive oil market have already begun to climb and are only likely to continue on an upward trajectory as the year goes on and supplies become increasingly tight.

Imports of olive oil to the UK peaked in 2021 at almost 93m litres, equating to consumption of almost 1.5L per capita, reveals Filippo Berio UK chief executive Walter Zanré. The split of these imports in the UK market were approximately 50% retail and 50% horeca (on-trade) and B2B. However, with upcoming shortages in supply and resulting higher prices, he is among a number of suppliers who foresee further volume decline in the offing.

In fact, recent MAT figures from Nielsen Scantrack reveal that while total value sales of all edible oils have maintained growth (+11%), volume

sales are down -2.4%, with only vegetable oil bucking the overall trend (+29.4%)¹. And, in fact, the figures for the last 12 weeks to 05.11.22 show an increasingly rapid drop-off in total volume sales of -17.5% for all edible oils¹, while value has maintained a strong performance, up 18.2%¹.

However, as Zanré notes, Nielsen data excludes the discounters, whom he says are “huge winners” in olive oil – notably, Aldi, Lidl and CostCo.

Within the above figures and during the same trading period, olive oil has seen a -10.7% volume decline (MAT), with value up 1.5% to 05.11.22 – or volume down -21.3% for the latter 12 weeks of that period and value +11.5%.

Meanwhile, the volume drop-off in sunflower oil (-40.1% in the 12-week period and up just 2.4% in value) has been to the advantage of vegetable oil,



which gained 16.7% in volume and a whopping 89.9% in value.

On longer-term performance, Edible Oils Ltd (EOL) reveals that Kantar figures showed the volume of litres sold had experienced a marginal decline of -4%². However, value levels were tracking at a 16% increase, driven predominantly by the increasing cost per litre, due to the effects of inflation².

EOL head of commercial Ria Joyce says shopper numbers have stayed relatively stable throughout the year, due to “a consistently high penetration of 88% in UK households for the category³”. “This figure also benefited from the broad range of oils available, with more and more consumers starting to understand where certain types of oils suit certain recipes and cuisines, and therefore widening their purchase options,” she adds.

Filippo Berio’s Zanré says that, while sunflower oil supplies have just about returned to normal, the market is still showing declines, with the main disruptor to its availability being the Ukraine conflict. This, he confirms, has resulted in shoppers substituting sunflower for vegetable oil, which is showing volume growth, as the previous Nielsen figures illustrate.

Meanwhile, he describes the supply situation for olive oil as nothing short of a “disaster” with all of the western end of the Mediterranean (Spain, Portugal and Morocco) affected by drought and the eastern end of the region unable to make up the shortfall.

At Farchioni Olii, export manager Marco Farchioni says the company has seen a decrease in the sales of extra virgin olive oil, especially in the smaller formats, which has been

Contents

| | |
|---|-----------|
| Analysis | 2 |
| War in Ukraine, fierce temperatures in the Western Mediterranean and an inflationary crisis have all taken their toll on the edible oils market, with more difficulties to come in the year ahead. So what do suppliers believe the best route is to ride out these unprecedented storms? | |
| Napolina | 9 |
| Taking a new marketing direction to support its growth plans | |
| Acesur | 10 |
| Offering quality products in a big-value format | |
| Edible Oils – Crisp ‘n Dry | 12 |
| Showing diversity and resilience with its rapeseed oil | |
| Edible Oils – U:ME | 14 |
| Adding fresh spice to consumers’ meal repertoires | |
| Farchioni Olii | 16 |
| Adapting its offer to meet challenging market conditions | |
| Filippo Berio UK | 18 |
| Retaining an unwavering focus on quality during tough times | |

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Sussex RH11 9RT. TEL: 01293 613400
EDITOR: Ellie Woollven
DESIGNER: Michael Joslin; Stuart Milligan;
Nick Figgins
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Analysis

compensated by an increased in olive oils in larger formats. “If we combine sales of both, the market has remained stable across the year,” he says. “However, with inflation and the unfavourable exchange rate, we have seen a stable turnover but a 10% decrease in volumes.”

Acesur international marketing manager Carla Alonso points out that, post-Covid lockdowns, there has been a ‘back to normal’ scenario in which shoppers have resumed the ‘going out’ consumption model, thus causing a deceleration in growth. She agrees that general inflation is also slowing down consumption, but adds: “Most retailers work on a 12-month contract basis, which generates a lag on the price catch-up.”

As such, with the drought in Spain and Italy causing “one of the poorest crops in decades”, global availability has been reduced, pushing up prices to levels never seen in the past. “The market will catch up with the new price scenario from Q1 2023 and we all foresee a drop in consumption of between 10% and 20%.”

Price crunch

The volatility is already playing out in UK supermarkets, with significant price rises for olive oil, in particular, amid a cost-of-living crisis, leading suppliers to put their emphasis on value and attempt to reassure shoppers on the quality of their products.

And the situation looks unlikely to improve any time soon.

“I have been in the olive oil business for 22 years and the current prices are the highest I have ever seen,” says Filippo Berio’s Zanré. “We are seeing a lot of very significant inflation in olive oil, with wholesale prices the highest ever seen, up 45% since the beginning of June. Since the start of the year, on our brand, Asda, Morrisons, Waitrose and Ocado have increased shelf prices and we expect Tesco and Sainsbury’s to follow suit.

“Most grocery retailers are renewing their private-label contracts and, similarly, facing this uniquely challenging supply situation. For example, we have also seen a very large increase in the price of Waitrose private label.” As an example, he cites the price of private-label Extra Virgin Olive Oil in Waitrose as landing at £4.80 for 500ml



and £8 for 1L compared to a Tesco price of £3.80 for 500ml and £5.15 for 1L⁴.

“The supply situation for 2023 is the most difficult I have ever experienced,” adds Zanré. “In very simple terms there is insufficient olive oil to meet 2023 demand and, in Q4 of this year, we are going to have a massive pinch point, as there will be no olive oil available.”

For the leading and trusted olive oil brands, however, consumers will often accept price rises if they feel they are getting the premium quality and taste associated with an extra virgin olive oil. Farchioni points out that his company has been producing olive oil for over 10 generations and says, those who have always used extra virgin olive oil will continue to prioritise quality over price. However, he warns: “If other brands decide to diminish the quality, thus compromising on taste, it could generate a significant devaluation of olive oil and many consumers will move to seed oils for convenience and

a more neutral flavour.” To avoid that change, the company has designed a new product for 2023 to meet current consumer needs – “a versatile everyday, premium-quality olive oil that is affordable”, he says. This is launching in Asda and Ocado.

At EOL, Joyce says the past year has been “particularly dynamic” with edible oils currently valued at £457.6m⁵. “The impact of the Ukrainian crisis sent prices of both sunflower and its natural alternatives of rapeseed, palm and soybean oil skywards, while further media coverages of the food shortages due to the conflict, led to significant sales increases for cooking oil.

“Demand levels in May and June 2022 reached the highest they have been in the last three years⁶. In fact, during these two months alone, over 36.6m litres of oil were sold UK-wide – over 40% higher than typical months⁷.”

Dry weather in the summer decreased the expected crop size for olive oil by



Speciality oils continue to spike interest

As consumer repertoires broaden in home kitchens, the interest in speciality oils and different flavour infusions is growing.

“Speciality oils are proving popular, with over a quarter of UK households having purchased these in the last yearⁱ,” says EOL head of commercial Ria Joyce. “Sesame, cold-pressed rapeseed and coconut remain the top three choices and account for 68% of litres soldⁱⁱ.”

“The unit sales of sesame have seen a marked increase with notably strong uplifts during calendar events such as Lunar New Year, which are only growing in popularity

in the UK,” she adds.

“Nut-based oils such as groundnut and walnut are performing well, too, as they are great for frying Indian and Chinese dishes.

And we are seeing increased demand for infused oils, with chilli, basil and garlic all being shopped for more frequentlyⁱⁱⁱ.”

She also suggests that corn oil will be a sub-sector to watch in future, as it has strong connections to trending Mexican and Caribbean food, despite the fact that sales suggest recent decline in the challenging market environment^{iv}.

Farchioni Olii export manager Marco Farchioni suggests

that while flavoured oils are increasing, they remain niche.

“From 2020 to today, they have nearly doubled in sales,” he says, but warns: “We must be careful to choose flavoured oils that contain only extra virgin olive oil with natural extracts. There are too many oils made with synthetic aromas.”

Meanwhile, Acesur marketing manager Carla Alonso sees great potential in avocado oil. “It is a popular alternative in other markets and it is starting to leverage interest among consumers in the UK. Also, other products that suit more adventurous

consumers, willing to explore and play with ingredients are showing great results. The most popular are olive oils flavoured with truffle, garlic or chilli.”

Filippo Berio UK chief executive Walter Zanré agrees that truffle is the flavour of the moment and says that, of the other flavour variants, garlic is the best-seller. “Flavoured olive oils provide convenient shortcuts for adding a burst of flavour to dishes,” he adds. “Feedback from shoppers is that Filippo Berio flavoured oils really deliver an intense flavour – particularly the chilli oil.”

as much as 50% and price points have responded to this reduced output accordingly, with oil prices rising by 40% in the three months to the end of December 2022⁸, adds Joyce. However, for EOL, the Ukrainian crisis earlier in the year and the resulting media coverage had the most significant impact on pricing across its brands, including Crisp ‘n Dry, Mazola, U:ME and Olivio. As a result, Joyce says, there were some short-term availability issues. “However, the anticipated interruption in supply did not materialise in the way forecast and, over the course of the year, supply routes for sunflower oil were re-established with global prices falling from their record highs⁹, which consumers will start to see in Spring 2023.

“As a brand, we have responded to each of these issues by increasing our availability of alternative oils and diversifying our supply – while maintaining support for growers in

Ukraine – in order to keep costs as low as possible for our customers. This remains a priority for us in 2023.”

Diversity in the kitchen

Partly as a knock-on effect of the Covid-19 lockdown experiences, suppliers are still seeing consumers willing to experiment with new and different cuisines in the kitchen, which is opening the door even further to market diversity. The cost-of-living crisis and inflationary environment have also served to extend that shopper interest due to the decrease in dining out and the consequent rise in entertaining more at home.

“Consumers are showing greater confidence in buying olive oil and there is an increase in consciousness and awareness of products that deliver healthier benefits,” says Acesur’s Alonso. “Among those consumers buying extra virgin olive oil, there is an increasing interest in buying

other categories, such as olive oil or speciality oils. La Española truffle oil, for instance, has covered a gap for more adventurous consumers, who want to experiment and achieve distinctive results in their dishes. We are also experiencing a drive towards healthier alternatives to substitute butter – for example, products such as Light in Colour olive oil and olive oil have gained increasing popularity in recent years, as these products prove to be a great alternative for healthier cooking, with great flavour results.”

According to Jeremy Gibson, brand marketing manager at Napolina, educating and communicating the benefits of olive oil is important in guiding users to understand the different usage occasions – “for example, using extra virgin olive oil for flavour, drizzling and dipping versus an olive oil being used for marinating and seasoning. Delivering an understanding of this can help grow

Analysis

the category and assist in the right oil being used on the right occasion, giving consumers confidence in cooking.”

EOL's Joyce agrees, saying: “For example, more shoppers are adding olive oil to their basket as they experiment with new dishes that involve drizzling over a dish or dipping, resulting in its share of overall market volume increasing¹⁰. Within this category extra virgin olive oil has gained the most momentum¹¹, accelerated by a growing interest in different oil regions and flavours, such as Umbrian and Sicilian.”

She says the ‘oil shopper’ has a complex and interesting profile. “From the confident household chef to the savvy cooks, we are constantly assessing consumer wants and needs to ensure we can continue to offer a diverse and exciting range to the UK market. But of course, this must also align with broader trends, external to the oil category, such as health-consciousness and cost-effectiveness.

“With the iconic status of many of our brands, we are conscious not to fall into the bracket of outdated, old school kitchen cupboard classics. We have invested a great deal of effort into those looking to push the culinary norms, not only keeping our brands and packaging fresh, but also placing ourselves in the explorative culinary space.”

Aspirational foodies – generally younger consumers, as per the company’s research – are relatively new to the category, and open to inspiration and education in the kitchen, she adds. The company’s U:ME Spice Shots in Japanese style, Lebanese style and Kansas City style BBQ are aimed at meeting the growing interest in cultures and cuisines and “introduce flair and volume to the edible oils aisle”.

Several producers are diversifying their offer, both to excite interest in the kitchen and alleviate some of the reliance on strained supplies for existing brands. New for 2023, Filippo Berio is launching “products into other categories with olive oil credentials”, such as a range of Filippo Berio Pasta Sauces, which will be available in Tesco from 23 January this year.

Napolina also plans to enter the chilled pasta category this year currently a £97m market¹², reveals Gibson. This will comprise a range of brand-new fresh pasta varieties,



“allowing customers to have even more flexibility and versatility when it comes to cooking with Napolina products”.

Health associations

Suppliers can also play into the increased interest in health & wellbeing that has emanated post-Covid.

“Consumers lean upon the edible oils category for a great number of reasons, so identifying category-wide health trends in the wake of Covid-19 is challenging,” says EOL's Joyce. “However the two core trends driving category growth – education and health¹³ – are key in consumers becoming more health-conscious and seeking a deeper understanding of the foods they are consuming.”

Joyce also points out that the company’s Crisp ‘n Dry brand, which is 100% rapeseed oil, is lower in saturated fat than olive, sunflower or coconut oil, while its U:ME brand offers a Vegetable & Olive Oil blend, with 15%

olive oil, and a Coconut Blend with 35% coconut oil blended with rapeseed and sunflower oil. “These types of blended oils enable consumers to benefit from the health and nutrient credentials of multiple products,” she adds.

Farchioni points to the beneficial contents of extra virgin olive oil. “Many oils can be fashionable, but only extra virgin olive oil contains all the essential nutrients for daily wellbeing and also contains polyphenols,” he says. “These antioxidants protect the body. So, I would challenge other producers to declare that other vegetable oils do better than filtered extra virgin olive oil. Our unfiltered oil contains 40% more nutritional value than other filtered oils. That’s why we lead in unfiltered oils in the UK, Italy and the rest of the world¹⁴.”

Acesur’s Alonso says it is the company’s “moral responsibility” to encourage consumers to buy olive oil as a healthier alternative to other fats. “Covid-19 not only had a great impact

Messages focus on quality and value

Given the considerable price pressures in the market, many suppliers are keen to reassure consumers and communicate the quality of brands. For olive oil, these tend to revolve around heritage, versatility and flavour, although sustainability is also an important factor.

Filippo Berio UK is planning an integrated marketing campaign “at a time when the brand is at its most expensive” reveals chief executive Walter Zanré. “It is important to communicate the reasons why they should pick up Filippo Berio. He notes that, when there is huge inflation, sustainability tends

to take a back seat for the consumer, but says the brand still has sustainability messaging on-pack and via PR and social avenues. However, for brand-building, supported by research, the messaging focus is quality and heritage with the brand’s founder, at its centre – “a key motivator for shopper choice”.

“The most effective way to transmit the message about sustainability is to engage with our consumers directly, making them feel part of the Farchioni ecosystem,” says Marco. “Our target audience is foodies who recognise the importance of provenance. We have

launched a number of marketing initiatives aimed at introducing consumers to the Farchioni family and the ‘Il Casolare’ experience in Umbria, including our olive groves, production facilities and original family house.”

Napolina is planning its largest-ever national marketing campaign with a £2m spend. The ‘Not so Humble Ingredients’ tagline is designed to push brand growth further and build on its position as the UK’s number one Italian cooking brand.

EOL’s Crisp ‘n Dry brand plans more national TV, supported by broadcaster video-on-demand and

advertorial work in the months running up to Christmas, and expects to see a move into digital and social, with the aim of having an ‘always-on’ campaign to remind shoppers that the brand is versatile throughout the year – not just for roast potatoes and winter cooking.

Meanwhile, the U:ME brand will continue to focus on a younger audience, using its collaboration with travel magazines to cement its usage in world food dishes.” For U:ME Spice Shots activities are planned to enable consumers to trial the products to encourage purchase,” says EOL’s Joyce.

on gaining more health consciousness, but also made a great impact on cooking trends and experimenting with other food alternatives. While consumers were in lockdown, there was an explosion of social media that contributed a lot to opening new paths for recipe exploration and learning about food and healthier alternatives, plus other types of ingredients to elevate dishes while having fun.

“This trend has opened up a great opportunity, since olive oil is a completely natural product and delivers great benefit for health. This encouraged us to adapt our marketing message to raise knowledge not only around the benefits for health, but also for final results in cooking.”

Meanwhile, Napolina’s Gibson points out that the brand’s products naturally appeal to health-conscious consumers, as categories such as tomatoes and pulses are one of their five-a-day. The brand has recently launched a range of

spray oils in Tesco, which are additive-free and 100% pure oil with nothing added, “perfect for consumers looking for a reduced serving of oil”, he says.

Filippo Berio is playing something of a trump card when it comes to the health benefits of olive oil. Last year, the company helped fund the final stages of a study by Glasgow University into exactly that topic. “Participants in the study were asked to consume 20ml (raw) per day of different types of edible oil – extra virgin olive oil, olive oil, sunflower oil, rapeseed oil – and their indicators (bio-markers) were monitored during a 12-week trial period,” reveals Zanré. “Olive oil has long been viewed as a healthy oil because of its association with the Mediterranean diet; the theory is based on the correlation that people who live in the Med have a lower incidence of heart disease than the UK, due to their diet and lifestyle. However, the challenge with this notion is that heart

disease takes many years to manifest itself, so it is very difficult to prove cause/effect.

“The distinctive methodology used in this study measured tiny levels of protein in urine, which are bio-markers of heart health, long before any symptoms are detected. By measuring these bio-markers during the study, we now have data to show that only extra virgin olive oil and olive oil had a positive impact on heart health. None of the other edible oils achieved this.”

Moreover, because fat is satiating, participants in the study did not gain weight, despite the extra calories contained in the oil; in fact some of them lost weight, potentially due to less snacking as a result of the satiety effect, he reveals.

As such, Filippo Berio has worked with nutritionist Linda Vezzoli to develop recipes and hints & tips for incorporating 20ml of olive oil into consumers’ daily diets and this will

Analysis

be a PR focus for the company during 2023, working with food journalists and industry bodies to share the research findings, along with practical steps of how to put them into practice.

Sustainable actions

“There is a massive change in the perception of sustainability for brands and consumers,” says Acesur’s Alonso. “This is shaping a new focus for business. We are working on plans in 2023 to reduce plastic materials and packaging weights, as well as look for alternative, sustainable materials that perform better in the recycling system.”

EOL’s Joyce says that, in every corner of the company’s work, sustainability must be at the forefront of development to align with its customers’ desires for a more sustainable future, and environmental preservation. “All of our brands are packed in the UK, which allows us to limit food miles across our products, and our Erith facility saw a £24m investment in 2021 that enabled us to reduce the environmental impact of the site.”

Napolina is continuing to champion sustainability across the portfolio with several initiatives, says Gibson. “Within olive oil, the brand has implemented a bottle made of 100% recycled plastic¹⁵, removing 38 tonnes of virgin plastic from the supply chain¹⁶. Meanwhile, Napolina’s bottles have a carbon footprint 60% lower than the glass alternative¹⁷,” he says.

Farchioni says the use of recyclable and plastic-free packs will be important to consumers in the year ahead. “I see too much olive oil in plastic containers, which is unsuitable for the environment and the product. The mission for the future would be to convince our consumers to ritualise bulk oil by going to the supermarket to fill it again from a larger tank and reusing the same glass bottles.”

Key trends going forward

Unsurprisingly, the cost-of-living crisis will continue to be at the forefront of all brand and product strategy for EOL, says Joyce. “As belts tighten, we need to make sure we are continuing to offer choices to consumers, both in range and pack size, to give greater budget control in-store. This proves both a challenge and an opportunity, as inflationary pressures are being felt across all



areas of the business. However, this is pushing oil and food manufacturers to look at their portfolio offerings.”

From the Ukraine crisis to avian flu, food security has demonstrated the importance of reliability in both supply and quality in 2022, without compromising on ethical or environmental impact, adds Joyce. “Supply chain hostility is at an all-time high, and as socio-economic pressures and global weather continue to be unpredictable, our sights must remain fixed on supply chain security.”

Filippo Berio’s Zanré agrees the vigilance from the authorities will be key over the coming year, as he fears “someone will cheat”. “There is a need to ensure the product is authentic and genuine as olive oil is susceptible to adulteration. We want the authorities to be very vigilant on this.”

Indeed, price availability and consistent service levels will be top of everyone’s agenda this year, believes Acesur’s Alonso. “Being able to guarantee price stability and good service levels will be our key challenges in the year ahead,” she says.

Keeping promises to the consumer regarding the product’s taste and

nutritional quality is paramount, says Farchioni. “The consumer must understand that a higher price corresponds to a higher quality.”

Consumer awareness and education are vital over the coming months to maintain a successful and progressive category, notes EOL’s Joyce. “The range and availability of oils on UK shelves is impressive and household penetration is high. However, growing – especially in times of both inflation and falling disposable income – relies on education that can explain to customers how various oils will improve their dishes and grow their confidence, repertoire of flavours and home culinary experiences.”

Sources

- ¹ Nielsen Scantrack, Volume/ Value data MAT to 05.11.22 and L12 wks to 05.11.22
^{2a3} Kantar WPO, 52 w/e 27.11.22
⁴ Shelf prices as of 05.01.23
⁵ Kantar WPO, 52 w/e 27.11.22
⁶⁻⁸ Global Oils Report
⁹ Mintec SFOR
¹⁰⁻¹¹ Kantar WPO, 52 w/e 27.11.22
¹² IRI, 52 w/e 20.02.22 vs 2YA/ Kantar, 52 w/e 02.10.22 vs YA
¹³ IGD, Retail Analysis, UK Trends 2023
¹⁴ Marke Track, The Nielsen Company (Italy) 2020
¹⁵ All Napolina oil bottles are now made from 100% recycled rPET (excludes cap and label)
¹⁶ 38t of virgin plastic will be removed from production following the move to 100% rPET from 51% PET, calculated against an average annual forecast of 8m units
¹⁷ Valpak 2020 data, based on an average CO₂ emission
- Speciality oils panel**
¹⁸ Kantar WPO, 52 w/e 27.11.22
¹⁹ Nielsen Scantrack, 12 wks to 05.11.22
- Marketing panel**
¹ IRI, 23.01.21

Napolina

Ambitious growth plans for the UK

DETAILS

Napolina
6th Floor, Royal
Liver Building
Pier Head
Liverpool L3 1NX
e: @napolina
w: napolina.com

KEY CONTACTS

Jeremy Gibson
Brand Marketing Director

KEY BRANDS

Napolina

Source

- ¹ Kantar, 52 w/e Nov 2022
- ² Kantar Usage Data
- ³ IRI, 52 w/e Nov 2022
- ⁴ IRI/Kantar, June 2021
- ^{5/6} Lightspeed Brand Health Study Dec 2021
- * All Napolina oil bottles are now made from 100% rPET (excl cap and label)
- * 38 tonnes of virgin plastic will be removed from production per annum following the move to 100% rPET from 51% rPET
- ** Valpak Environmental Assessment 2020

↘ Napolina, the UK's No.1 Italian cooking brand, which is chosen by 10.8m consumers¹ each year, has recently repositioned to kick-start 2023, reveals brand marketing director Jeremy Gibson. "Napolina's largest ever £2m national marketing campaign, 'Not so Humble Ingredients', is inspired by the common misconception that staple ingredients such as olive oil, chopped tomatoes, and pasta are the support acts in home-cooked Italian meals," he says. "The new marketing direction has been developed to support Napolina's ambitious growth plans in the Italian category in the UK, creating a distinctive tone of voice that will resonate with new and existing shoppers across the category and drive brand cut-through.

The Italian brand features in twice as many Italian meals as the closest competitor in the UK² and has annual sales of £102m at RSV³ as Italian remains the UK's most popular cuisine⁴. Napolina, which consumers view as a



“The new marketing direction will resonate with shoppers and drive brand cut-through”

trusted brand that delivers high-quality ingredients⁵, offers good value for money⁶ in olive oil, which is important as inflationary pressures continue.

As regards sustainability, Napolina has implemented a bottle made of 100% recycled plastic*, removing 38t of virgin plastic from the supply chain[†], and with a carbon footprint 60% lower than the glass alternative^{**}.

UK's No.1 ITALIAN COOKING BRAND*



Napolina

✓ Bought by 10.8 million shoppers**

✓ Our biggest ever national campaign landing in 2023

NOT SO HUMBLE INGREDIENTS

Acesur

Offering versatility and value

DETAILS

Acesur
CTRA Madrid-Cadiz KMN
550.60 Dos Hermanos
41700 Sevilla
Spain
t: +34 954 690900
w: laespanolaoliveoil.co.uk

KEY CONTACTS

Miguel Colmenero
La Española
Commercial Director
e: mcolmenero@acesur.com

Carla Alonso
La Española International
Marketing Manager
e: calonso@acesur.com

KEY BRANDS

La Española
– Extra Virgin Olive Oil
– Olive Oil
– Light in Colour Olive Oil
– Organic Extra Virgin Olive Oil
– Gourmet Extra Virgin Olive Oil
– Olive Oil flavoured with White Truffle

Due to the tough scenario companies are facing in the market this year, Acesur is focusing on product lines that meet its current consumer trends, says international marketing manager Carla Alonso. “Firstly, we are targeting those consumers looking for the best value for money, concentrating our efforts on a new, big-value format: La Española Olive Oil 1L,” she says. “This offers an easy-to-use substitute for butter and other fats, bringing a healthier oil alternative for better results in day-to-day cooking.

“Secondly, a growing number of consumers feel more adventurous and are willing to experiment in the kitchen. Our olive oil sprays – La Española Extra Virgin Olive Oil spray 200ml and Olive Oil Spray 200ml – are the perfect fit and we will put a special focus on these lines in 2023. A single spray dispenses a fine mist, giving the exact amount of oil needed to achieve the perfect results in recipes.”

The spray cans contain 100% olive oil, with no propellants and no additives, adds Alonso. “Due to the competitive climate in the market, it is important for us to safeguard the quality and traceability of our products, offering 100% Spanish olive oil that comes only from local farms in Spain.”

Focus on health and education

Acesur’s goal is to maintain La Española as the best-selling Spanish olive oil brand in the UK¹, explains Alonso. “Within our olive oil range we have launched new products that meet consumer demand both for high-quality products with versatile uses and for healthier products that are good value for money,” she says.

“Health and sustainability are the main drivers of our NPD, and we are constantly looking at products that are versatile, achieve great cooking results with ease and fun, and help consumers maintain a healthy lifestyle.

“Our goal is to educate consumers about the different olive oils and their usage, so they are better informed when purchasing. We control every single detail in our fully integrated supply



“A growing number of consumers feel more adventurous and are willing to experiment in the kitchen. Our olive oil sprays are the perfect fit”

chain, to ensure we deliver the best olive oil at the best possible price. Our continuous promotional activity also reinforces this promise.

“Acesur’s 360-degree marketing helps us achieve product visibility at point of sale,” she adds. “Our online and offline marketing activities increase consumer awareness in three main areas: the product, health benefits, and cooking inspiration. Social media now plays a key role in learning about food ingredients, and we have a special focus this year on digital marketing campaigns, reinforcing key aspects of olive oil through generated content and influencer marketing.

“Experiential marketing also holds significant value for our consumers and, last year, we offered different olive oil experiences through our roadshow. We plan to bring these experiences live again in 2023.”

Source

¹ The Grocer’s Top Products 2022, in association with Nielsen IQ, 52 weeks to 10.09.22

La Española

Experience 100% Spanish

**BIGGER
BOTTLE
GREATER
VALUE**



More customers are choosing olive oil as a healthy alternative to butter and other fats.

We are investing in a 360° marketing plan to grow the olive oil category.

La Española continues to be the biggest selling Spanish olive oil brand in the UK*

La Española Olive Oil 1L is the latest addition to our expanding range of authentic, Spanish olive oils to suit every retailer and every customer. Now available in store and online at Tesco.

*Source: The Grocer's Top Products 2022 in association with Nielsen IQ; 52 weeks to 10 September 2022

www.laespanolaoliveoil.co.uk

Edible Oils: Crisp 'n Dry

Diversity and resilience

DETAILS


Edible Oils Ltd
6th Floor, Royal
Liver Building
Pier Head
Liverpool L31NX
w: crispndry.co.uk

KEY CONTACTS

Claire Graham
Senior Commercial
Manager
Ria Joyce
Head of Commercial

KEY BRANDS

Crisp 'n Dry
U:ME
Mazola
Flora Sunflower Oil
Olivio

 In 2022, Crisp 'n Dry continued to evolve its consumer offering and is currently the biggest selling cooking oil brand in the UK¹, reveals Ria Joyce, head of commercial at Edible Oils.

“Thanks to its natural properties, consumers can heat Crisp 'n Dry to a very high temperature before it starts smoking, making it exceptionally versatile in the kitchen – perfect for roasting, basting, browning and frying,” she says. “What’s more, this iconic brand is largely home-grown, with the majority of the rapeseed grown in the UK, meaning it proudly supports British farmers, and uses low food miles to the UK packaging plant.”

Crisp 'n Dry is 100% rapeseed oil, meaning it is lower in saturated fat than olive oil, sunflower oil or coconut oil and has 10 times more Omega 3 than olive oil, explains Joyce. “It’s also high in monounsaturated fats that are found in avocados and nuts, has zero carbs, and is free from trans fats. The kitchen favourite also boasts exceptional natural credentials, with no crop being genetically modified.”

New bottles for 2023

Product utility and diversity is also a positive for the UK customer, she adds. “Towards the beginning of the year, Crisp 'n Dry launched new bottles for its flagship 1L and 2L products, in a bid to instil more natural cues to its range and reflect its source of 100% rapeseed oil.

“In addition to this, Crisp 'n Dry expanded its offering across the market by introducing the iconic oil in a new spray format, that is just 2Kcal per spray. This is perfect for both calorie counters and those wanting to avoid any additives in their oil.”

Increasing the Crisp 'n Dry options for consumers gives them flexibility in the amount they want to spend when buying their oil, and also demonstrates that this is an all-round kitchen pleaser that’s great for more than just the occasional fry, notes Joyce.

Brand versatility

“The brand’s national TV campaign in 2022, coupled with multiple features on BBC Good Food and



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other titles, demonstrated that Crisp 'n Dry is so versatile that it can be used for exceptional roast potatoes, through to home-made doughnuts,” she says.

“Its resilience and respect has been seen not only via its offering across shelves, but also as a market performer.”

Promotion and pricing

As with all seed oils, 2022 was challenging year and prices increased. Crisp 'n Dry has a new promotional campaign including a new price-marked pack, launched in October 2022. With gondola ends during the recent Christmas period in major retailers, Crisp 'n Dry, together with national TV and advertorial activity, continues to encourage consumers to ‘give it 100%’ for all their culinary needs.”

Source

¹ Kantar Worldpanel, UK cooking oil, 52 w/e 27.11.22

SIMPLY 100% RAPESEED OIL

THE UK'S NO.1

COOKING OIL*



IF SOMETHING'S
WORTH DOING,
GIVE IT 100%

PERFECT FOR ROASTING, BASTING, BROWNING OR FRYING

Edible Oils – U:ME

Spicing up shoppers' dishes

DETAILS

Edible Oils Ltd
6th Floor, Royal
Liver Building
Pier Head
Liverpool L31NX
w: ume.cooking

KEY CONTACTS

Claire Graham
Senior Commercial
Manager
Ria Joyce
Head of Commercial

KEY BRANDS

Crisp 'n Dry
U:ME
Mazola
Flora Sunflower Oil
Olivio

U:ME is a speciality oil brand that prides itself on making any dish sing, with a wide range of oils and Spice Shots on offer.

Having launched in 2020, the brand has spent the last two years honing its niche in simplifying the cooking process and providing an answer to the age-old question of 'which oil do I use and when?', following research that showed over half of Brits find this confusing¹.

"U:ME was the first to offer clear, on-pack guidance that appeared front and centre with bright, vibrant colour choices in its branding designed to engage consumers from the off while helping to educate, inform and – most importantly – inspire," explains Ria Joyce, head of commercial at Edible Oils.

Available in a large variety of flavours, blends and formats, each oil has been specially developed for different cooking techniques, she says. "For example, the Vegetable & Olive Oil Blend is perfect for roasting and frying, and the Coconut Oil Blend and Coconut Oil Spray is ideal for stir-frying and baking. By harnessing the blend of vegetable and olive oil, U:ME's oil offering also provides that extra delicious taste when compared to a regular seed and comes at a lower price point than pure olive oil."

The launch of the brand's Spice Shots opened an exciting chapter, making it possible for shoppers to bring oomph to their meals with just two teaspoons of the oil-based spice blends, adds Joyce. "The range was formulated in response to consumers' growing interest in the rich and exotic flavours of foreign cuisines, with research by U:ME only recently revealing that seven in 10 consumers have tried dishes from



“Spice Shots combine the herbs, spices and oils needed for any cuisine, taking the guesswork out of cooking and adding the adventure back in”

countries such as Lebanon, Ethiopia and Peru in the past 12 months²," she reveals.

"Spice Shots are available in three popular flavours – Japanese Style, Lebanese Style and Kansas City Style BBQ – and combine the herbs, spices and oils needed for any cuisine, taking the guesswork and complications out of cooking and adding the adventure back in."

The brand is supported by a six-figure marketing campaign designed to drive key messages. "This year, this resulted in a high impact earned media campaign, numerous social activations and a partnership with popular influencers to develop a number of video recipes across TikTok and Instagram that targets the younger consumer," says Joyce.

The impact of the Covid-19 pandemic and the cost-of-living crisis on the rise of home cooking has also meant that usage numbers for U:ME have remained high, she adds. "Consumers want to try new dishes and escape from the everyday norm of their usual go-to's but are often time-poor and tight on budgets so appreciate all the support they can get in the kitchen.

"This forms a key part of U:ME's overarching goal and message – to build consumers' confidence in the kitchen as they develop a love for gathering family and friends together and creating delicious dishes with ease."



Source

¹ Full Colour Research, September 2019. 'Helping Princes Identify a Winning Oil Territory'

² One Poll survey carried out from 17-30 September 2022, with 2,000 respondents.

U:ME Tasty SPICE SHOTS NEW

Add **ÖOMP**H to your dish in 2 teaspoons
An oil based spice blend



SO MANY USES,
SCAN FOR MORE

Farchioni Ollii S.p.A

Adapting to challenging times

DETAILS

Farchioni Ollii S.p.A
Via Madonna del Puglia
06035 Guadolo
Cattaneo
Perugia
Italy
t: +39 0742 929553
w: olliofarchioni.com

KEY CONTACTS

Marco Farchioni
Export manager
e: marco@farchioni.com

KEY BRANDS

Il Casolare Extra Virgin Olive Oil, Cold Pressed & Unfiltered
Il Casolare Riserva 1780
Il Casolare Organic Extra Virgin Olive Oil
Il Casolare 100% Italian Extra Virgin Olive Oil

↙ The Farchioni family has been producing the finest-quality extra virgin olive oil in Italy since 1780, explains Farchioni Ollii S.p.A export manager Marco Farchioni. The business' expertise is deep-rooted, with each generation passing down to the next how to select and blend oils to achieve the highest quality and taste. The Farchioni family is one of the most important Italian farmer-producers of extra virgin olive oil and the leader of the unfiltered EVOO in the world, he notes. "We have now cultivated more than 5,000 hectares in Italy and, in the last five years, planted more than one million olive oil trees in Italy to give the best offer to our customers."

The Farchioni brand has been in the UK for two decades thanks to the success of its Il Casolare Unfiltered Extra Virgin Olive Oil, the No.1 unfiltered oil in Italy¹. It is now expanding its UK portfolio in response to the current economic challenges driving consumer purchasing decisions.

Italian excellence and affordability

"Farchioni puts its consumers at the centre of everything it does," says Marco. "In this challenging financial climate, we wanted to introduce a product that is affordable but doesn't compromise on the superior quality and taste Farchioni is known for."

In response, the company has launched Il Casolare Classico Olive Oil, a superior olive oil produced with a percentage of Il Casolare Unfiltered Extra Virgin Olive Oil, which Farchioni believes will start a new trend in olive oil consumption – "a versatile everyday premium-quality olive oil that



“In this challenging financial climate, we wanted to introduce a product that is affordable but doesn't compromise on the superior quality and taste Farchioni is known for”

is affordable”, says Marco. “Slightly milder in flavour than an Extra Virgin Olive Oil, the new product is suitable for all culinary needs, from dressings and marinades, through to use in frying and baking.”

The Il Casolare Classico Olive Oil is available in a larger, 1L format, packaged in plastic-free, recycled glass bottles. Farchioni's product labels all carry the QAS® logo, highlighting its strict sustainability procedures, subject to regular independent audits.

Marketing support

Farchioni has recently implemented a multi-platform marketing campaign in the UK, comprising PR, social media and influencers, alongside consumer and trade advertising and on-pack promotions. “Centred around our rich Italian heritage, our marketing communicates to consumers that we are an authentically Italian brand, with generations of expertise in olive oil,” says Marco. “Our target audience is ‘foodies’, who recognise the importance of provenance. So we have launched several initiatives aimed at introducing consumers to the Farchioni family and the ‘Il Casolare Experience’ in Umbria.”



Source

¹ Marke Track, The Nielsen Company (Italy) 2020



Il Casolare[®]

Created with passion

Introducing Il Casolare Classic Olive Oil, a versatile everyday premium quality olive oil that is affordable without compromising on the superior quality and taste that Farchioni is known for.

We have cultivated more than 5,000 hectares across Italy and in the last five years have planted more than 1 million olive oil trees so we can continue to give our customers the very best.



Created by the Farchioni Family, an authentic Italian family of farmers since 1780.



AVAILABLE IN 1L FROM:

ASDA **cocado**

Filippo Berio UK

Uncompromising quality

DETAILS

Filippo Berio UK Ltd
 Premiere House
 Elstree Way
 Borehamwood
 WD6 1JH
 t: 0203 819 8910
 e: info@fberio.co.uk
 w: filippoerio.co.uk

KEY CONTACTS

Walter Zanré
 Chief Executive
Andy Coult
 Commercial Director
Lisa Mullins
 Marketing Manager

KEY BRANDS

Filippo Berio Olive Oil
 Filippo Berio Flavoured Oils
 Filippo Berio Pesto
 Filippo Berio Pasta
 Sauces (NEW for 2023)
 Filippo Berio Vinegars

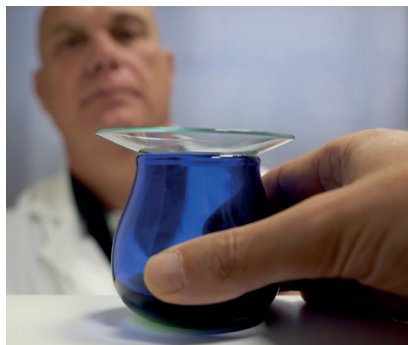
2023 looks set to be a particularly challenging year for the olive oil category. Wholesale olive oil price rises have broken all records, increasing by 45% since June 2022, mainly due to the severe drought in the Mediterranean – which resulted in catastrophic predictions for the 2022/23 olive harvest yield. This comes hot on the heels of inflationary pressures caused largely by conflict in Ukraine, as well as a lingering Covid effect.

However, despite these difficulties, Filippo Berio remains uncompromising in its commitment to quality and supporting the olive oil category, says chief executive Walter Zanré.

“True to our founder’s dedication to fine flavour, an unwavering focus on product quality continues to drive and inspire our business,” he says. “Filippo Berio’s highly experienced tasters sample 6,000 olive oils every year, yet only 6% are actually selected to become Filippo Berio olive oil. We source olive oil across the Mediterranean, working with many of our growers over decades, building strong relationships based on long-term trust and mutual respect.

“Before being accepted, every extra virgin olive oil consignment that arrives at our facility in Italy undergoes a complete chemical analysis and a taste panel evaluation in our laboratory – we never rely on third-party certification. Also, there are almost 30 separate tests undertaken in four different phases of the production process that ensure all our oils are 100% genuine and authentic.

“In short, shoppers know that when they choose Filippo Berio Olive Oil, they are buying a product they can trust from an authentic brand steeped in tradition and expertise. Hence, Filippo Berio is able to command a premium in the



“We source olive oil across the Mediterranean, working with many of our growers over decades, building strong relationships based on long-term trust and mutual respect”

market – proving price is not the only factor influencing shoppers’ choice.”

At a time when oil prices have never been higher, reassuring consumers becomes even more important, and Filippo Berio is supporting the brand with a comprehensive programme of marketing activities, notes Zanré.

“A combination of traditional TV advertising, featuring our trademark music, along with print advertising in key food titles and weekend supplements regularly puts Filippo Berio in front of more than 30m people – featuring our core brand messages of heritage and quality. We also have a vibrant and engaged community of foodies, connecting on social media, coming to our events and taking part in online prize draws and competitions.

“Our ongoing commitment to quality and investment in our brand is a sound long-term strategy and, by stocking Filippo Berio, retailers can be confident they will grow their olive oil sales.”

THE UK'S NO. 1 OLIVE OIL BRAND.*

Category-leading performance,
driving category growth.

- Brand leader with 30.7% market share*
- Growing ahead of the category
(Category +12.0%, Filippo Berio +21.4%)*
- Investing to drive growth: fully integrated 2023
Marketing Campaign including National TV advertising,
magazine advertising, on-pack promotions,
digital activation and 1 million recipe booklets

For more information, please contact
ANDY COULT on andy.coult@fberio.co.uk
or 07510 591022.

Filippo Berio

His signature. Our promise.

*Source: Nielsen Olive Oil Category VALUE 12wks 03.12.22



WilliamReed.

William Reed LTD.

Broadfield Park, Crawley, West Sussex RH11 9RT

Tel: 01293 613400 Fax: 01293 610380

www.thegrocer.co.uk