

Italy – a bread nation

ITALIANS LOVE BREAD, BOUGHT FRESH DAILY FROM AN ARTISAN BAKER, BUT EVEN ITALY WILL SEE A STRUCTURAL CHANGE SOON



Marco Uberti/Fotolia

✚ In Italy, more than 250 different types of bread are available. Citta del Pane is an organization (www.cittadelpane.it) that takes care of maintaining this tradition and provides information. The bread types differ depending on the region and range from drier products with a thick, barely brown crust with fine tight crumb to rustic products with open pore pattern produced with biga (sponge dough) and a dough hydration of up to 90 per cent.

Bread is mainly consumed in Italy during two main meals. 83% of all Italians report that they eat bread for dinner while 81% do so for lunch. Breakfast (13%) and breaks during the day are less bread-oriented. In a restaurant, a basket with bread is routine and is placed on the table, at latest when ordering. A telephone survey of 1,488 consumers conducted by Astra Ricerche, found that in absolute figures the consumption of artisan bread has increased since the turn of the century more distinctively than the consumption of industrially made products. However, in relation to the total figures, the growth of industrial bread consumption is higher. Alternatively, the consumption of bread replacement products such as rusks, Grissini or dry salted goods has clearly decreased. According to the Astra Ricerche survey, more than 500,000 Italians bake their own bread either in tradi-

tional or high-tech baking ovens. It is mainly students and families from the middle classes who belong to this group and it is no longer the established farmer families.

Two thirds of Italian households still buy their bread fresh daily or almost every day, with more than 20% buying two to four times a week. The average price per kilogram is between 2.5 and 3 Euro, depending on the type. The price drops, as much as 50%, when moving down to central and southern Italy.

The industrial companies mainly produce soft types of bread and rolls which are sold via supermarkets. Between these companies and the traditional artisan bakeries there are more and more semi-industrial companies emerging which produce with the help of automation technology a small product range of traditional varieties and of traditional quality which are supplied to supermarkets, restaurants and large consumers. They also have their own net of sales outlets or they deliver their products to chain stores which focus only on sales. In general, these companies pay attention to high quality and do not skimp on raw materials or production costs. They have the market advantage of automation of their production which requires a significantly lower part of the turnover to be spent on labor costs compared to a traditional craft baker. In Italy, there are hardly any young

people willing to work night shifts for low wages. These semi-industrial companies which combine the virtues of family-managed companies with a healthy desire for more efficient production procedures may be the winners of the structural change that is lying ahead.

In most bakeries, the products are sold in the same way as in Grandfather's time. The stores are functional. In the cities, and not just in the metropolitan areas - in the north more

than in the south - more and more attractive designs and product presentation, following all aspects of today's marketing can be observed. The supermarkets increasingly house in-store bakeries following the international model. According to the Association of Industrial Bakers, their market share is currently 12%, but with the increasing significance of international supermarket chains on the Italian food market, their growth strength will increase. +++

++ Market Data

Number of artisan ovens	24,386
Number of industrial ovens	150
Annual production	3,150,000 t
Annual turnover	7.8 billion Euro
Number of employees	180,000
Number of employed in allied industries	150,000
Daily consumption of bread per capita in grams	160 (58 kg/year/capita)

Source: Italian Federation of Bakers, Pastry makers and Associates

++ Consumption of bread in Italy

- 96% of all Italians buy fresh artisan bread
- 28% of all Italians buy industrially produced bread
- 7% of all Italians buy frozen bread
- 66% of all Italians buy rusks
- 63% of all Italians buy salted baked goods
- 46% of all Italians buy Grissini (bread sticks)
- 17% of all Italians buy Granetti (dry small baked goods, snack-type)

Source: representative phone survey by Astra Recherche on behalf of SIAB

++ Market shares

- Industrial bakeries 25%
- Artisan bakeries 63%
- In-store bakeries 12%

Source: Association Internationale des Boulangeries industrielles (AIBI)

++ Market shares

	Tons	Euro/ per cent
Total	3,150,000 t	7,800,000,000 € = 100%
Preserved	150,000 t	300,000,000 € = 4%
Industrially made, fresh	200,000 t	500,000,000 € = 7%
Artisan products, fresh	2,800,000,000 t	7,000,000,000 = 89%

Source: Italian Federation of Bakers, Pastry makers and Associates



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