

A wooden charcuterie board is the central focus, filled with an assortment of Italian delicacies. It includes several slices of prosciutto, salami, and a wedge of cheese. There are also artichokes, figs, and a small bowl of olives. A hand is visible in the upper right corner, reaching towards the board. The background is a dark, textured surface.

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COVER STORY



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DELI BUSINESS IS PUBLISHED BY
PHOENIX MEDIA NETWORK, INC.

P.O. BOX 810425,

BOCA RATON, FL 33481-0425

PHONE: 561-994-1118 FAX: 561-994-1610

www.delibusiness.com

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PRINTED IN THE U.S.A.

PUBLICATION AGREEMENT NO. 40047928

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LE GRUYÈRE AOP PREMIER CRU CROWNED WORLD CHEESE CHAMP



The world champion cheese, recognized at the World Cheese Awards for a record fourth time, is Le Gruyère AOP from Cremo SA von Mühlenen in Fribourg, Switzerland. An international panel of more than 250 expert cheese judges assembled for two days in Birmingham, UK late last year scrutinizing 2,727 cheeses from more than 25 countries.

Held at the BBC Good Food Show at the National Exhibition Centre, the World Cheese Awards identifies Gold, Silver and Bronze winners. From the team favorites, 62 "Super Golds" were chosen. A panel, representing the four corners of the globe, then decided the World Champion 2015: Le Gruyère AOP Premier Cru.

With Le Gruyère, "you're transported," says Mexican judge Carlos Yescas, from the Oldways Cheese Coalition. "This is a wonderful representation of this type of cheese and you can really taste the terroir."

The United States also did well at the World Cheese Awards. Wisconsin won more awards for its cheese than any other state, with 13 companies taking home 37 awards. Monroe, WI-based Emmi Roth USA collected three medals: gold for Grand Cru Reserve, silver for GranQueso Reserve and bronze for GranQueso.

Other Super Gold winners include: Union, NJ-based Lioni Latticini for its Burrata Con Tartufo, featuring truffles from Italy's region of Umbria; and Schloss, a washed-rind cheese from Marin French Cheese of Petaluma, CA. Schloss, which means "castle," competed against cheeses from Switzerland, France, England and Canada — bringing home the only award to an American-made cheese in the washed rind category.

COMING NEXT IN APRIL/MAY ISSUE

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Food Bars

Sushi

DELI MEATS

Salami

CHEESES

Grana Padano

American Sheep Cheese

SUPPLEMENT

IDDBA Pre-Show Guide

COMING IN JUNE/JULY

DELI BUSINESS will be taking a look at 12th Annual People's Award.

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Announcements



ANCHOR WINS PACKAGING AWARD

Anchor Packaging, St. Louis, has won the 2016 WorldStar Award from the World Packaging Organization (WPO) in the food category. Judges reviewed 293 entries from 35 countries, choosing Anchor's Embraceable as a winner. Embraceable is a black, oval platter designed and patented with a locator ring in the bottom to hold a standard 8-ounce squat paper food container.

www.anchorpac.com



RESER'S NAMED AS NX5 SPONSOR

Joe Gibbs Racing (JGR) has announced the No. 20 Toyota Camry driven by 2015 NASCAR Camping World Truck Series champion Erik Jones will carry Reser's Fine Foods as one of four sponsors for his rookie season in the NASCAR XFINITY Series (NXS). Jones has 26-career starts in the XFINITY Series over two seasons of running a limited schedule. He has earned two wins, three pole starting positions, 13 top-five finishes, 20 top-10 finishes and led 292 laps with an average start of 4.8 and average finish 8.9.

www.resers.com



LUNDS INCORPORATES PARTeCH SOFTWARE

ParTech Inc., New Hartford, NY, a wholly owned subsidiary of PAR Technology Corp. has announced that Lund Food Holdings Inc. has selected the PAR SureCheck Advantage Solution to support its food safety program at all of its Lunds and Byerlys grocery stores. This program will automate HACCP processes to improve efficiency, digitize data and proactively monitor all stores' quality and compliance.

www.partech.com



FORTUN FOODS' WINNING CHOWDERS

Fortun Foods, Kirkland, WA, wins top honors for its clam chowder recipes at the 28th Annual San Clemente Seafest's famous Chowder Cook-Off Competition in San Clemente, CA. Fortun's New England Clam Chowder and Ultimate 3-Clam Chowder each won first place in the Judges' Choice Restaurant and Individual categories, respectively.

www.fortunfoods.com

Transition



NEW FACILITY FOR PARM CRISPS

Kitchen Table Bakers, makers of Parm Crisp Wafers and ParmCrisp Minis, has moved production to an allergy-friendly, state-of-the-art facility in Syosset, NY. Nearly double its previous size, the 10,000-square-foot facility enables greater flexibility, enhanced quality control and increased capacity to meet growing consumer demand.

www.kitchentablebakers.com



SCHUMAN ANNOUNCES NEW OFFICE, VP

Arthur Schuman, Fairfield, NJ, the largest importer of hard cheese in the U.S., announces new offices in Hong Kong and Singapore to be headed by Gordon Craig, its new vice president of sales for Asia and Oceania. Craig, 44, has extensive experience working in the dairy and cheese industry. He worked at the Fortune 500 Company Mitsui & Co., and most recently at Agropur, one of the top five dairy cooperatives in North America.

www.arthurschuman.com

New Products



NEW DAIRY SPREADS

A&M Gourmet Foods Inc., Toronto, ON, has recently launched a gluten-free line of Gourmet Cheese Spreads under the Authentic Menu brand. Four flavors, including Mandarin Orange, Triple Berry, Sundried Tomato and Artichoke, Asiago & Jalapeno, are available in 8-ounce sizes. The creamy and smooth spreads can also be used as dips or toppings.

www.amgourmetfoods.com



ORGANIC CHICKEN FOR FOODSERVICE

Perdue Foodservice, Salisbury, MD, has launched Perdue Harvestland USDA Certified Organic Fresh and Frozen Chicken. The certification ensures the birds are raised in a free-range environment on certified organic farms, fed an organic non-GMO grain diet with no animal by-products or antibiotics. The line is available in whole bird, boneless skinless breast and boneless skinless thigh formats.

www.perdufoodservice.com

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New Products



NATURAL ARTISAN DELI LINE LAUNCHED

McKenzie, Burlington VT, has developed an all-natural artisan deli line in recognition of growing consumer awareness of health claims like antibiotic free and uncured. The line includes six turkeys, four uncured hams, four cheeses, two chickens and one beef — all crafted with natural ingredients like whole muscle meat, raw milk and pure Vermont maple syrup. The product packaging has also been redesigned to reflect McKenzie's bold new venture. Non GMO offerings will be available soon.

www.McKenzieMeats.com



ALL IN ONE FONDÜ

Emmi USA, Monroe, WI, has launched the Fondü All in One. A first of its kind, the product has portable, microwaveable and oven-safe packaging that takes the stress out of fondue. It starts with all-natural, premium cheese from Switzerland and includes a dash of white wine and Kirsch cherry brandy, an ode to Swiss tradition. Just heat, eat, and dispose into the recycle bin.

www.emmiusa.com



NEW TRUFFLE CHEDDAR

Grafton Village Cheese, a business of the nonprofit Windham Foundation in Grafton, VT, introduces Truffle Cheddar, an aged Cheddar cheese containing Italian truffles. Joining the company's Grafton Village line of aged and flavored Cheddars, Truffle Cheddar is made by hand using premium raw milk from small local family farms, and aged a minimum of 60 days.

www.graftonvillagecheese.com

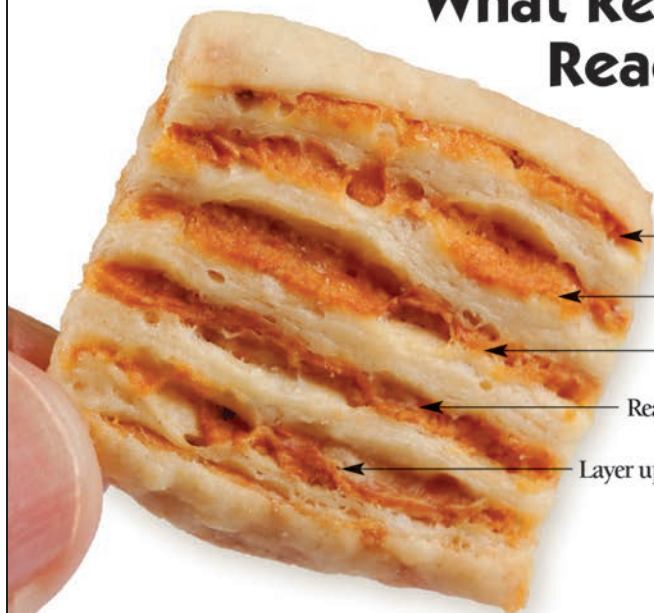


TRIBE'S NEW HUMMUS FLAVOR

Tribe, based in Boston, has launched its latest limited batch hummus flavor, ranch. Tribe's new product blends the popular taste of ranch salad dressing with the creamy texture of traditional hummus to create a smooth, dairy-free dip. The perfect complement to vegetables and salty snacks, the dip does not include any of the high-calorie dairy products traditionally found in ranch dressing.

www.tribehummus.com

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by Jim Prevor, Editor-in-Chief

Pondering Private Label

The feature on private label in the deli department, addressed in this issue by longtime Deli Business contributor Lisa White, begins on page 22 and is an important issue indeed. Without doubt top supermarket executives are pushing private label and there is no question today's private label programs are not your father's private label programs. The days when private label was synonymous with low quality or even cheap — are long gone.

If you go to the grocery section of a retailer that is a top practitioner of private label marketing like Wegmans, you will see a product such as Ronzoni Spaghetti is surrounded with private label options. Wegmans will offer bargain options, upscale options, healthier options, etc.

Retailers look to pursue private label for one of two reasons. Some retailers, such as Trader Joe's, place great emphasis on not just private label, but on proprietary product which is then private labeled. In this case the private label functions to attract and retain customers based not just on price but on the unique flavors and attributes of the product which is available exclusively at a particular retailer.

In most cases retailers pursue private label in order to raise margins while also providing consumers with less expensive options. Private label is often tiered, so that these options can be provided at several quality and price points.

The first question is how can a retailer offer private label products at such affordable prices while also increasing the retailer's margin? It is not just cutting out the net profit made by the branded manufacturer, as that is usually too small to make much of a difference. Instead the idea is to buy or produce product not only without the branded firm's profits, but also without its expenditures for brand marketing and new product development.

Branded manufacturers have to bear a good chunk of the blame in the evolution of such a robust private label market. Many feel compelled to go for the quick buck and, in effect, create their own competition. The manufacturer has a factory operating at 80 percent capacity and a retailer offers to buy up the last 20 percent — at marginal cost plus a profit. The marginal cost is much lower than the actual cost as there are a lot of sunk costs such as building the factory, etc. In any case the manufacturer grabs the money and the retailer is now a powerful competitor to the retailers selling the branded product. So branded sales go down, private label goes up and the manufacturer finds more and more of its product sold at low margins. This is a recipe for disaster over time.

Yet for the industry — and the consumer — the problem with private label exists even if the retailer owns the manufacturing plants or is buying from suppliers who only do private label. When pricing their own products branded manufacturers include marketing campaign costs as well as funds for research and development to create the next generation of products.

Moving forward who will invest in advertising and marketing to build demand? Where will the money come from to develop new products to keep the category fresh and growing?

It is almost like eating your seed corn, in the short term this is profitable but, long term, there is nothing to eat. So with private label, in the short term there is margin to take and price discounts to offer consumers — but, long term, the category is being denied resources necessary to grow and create innovative products to delight consumers.

And here is a dirty little secret: Retailers who embrace private label also lose the ability to persuade consumers they offer superior value. No less a savvy businessman than Sam Walton loved brands — why? — Because he knew if a retailer is cheapest on Coke or Tide, consumers would really know they are getting a good deal. If you are cheapest on your own private label that product may not be comparable in taste and quality with a national brand or another retailer's private label — so the consumer is left wondering.

Retailers who develop proprietary flavors and products are in effect investing to build their own national brands. This columnist's children won't eat any meatballs but Trader Joe's meatballs. Similarly, the chief executive of a tuna fish company once told me the top line of Costco's Kirkland brand tuna is better than anything sold by his company.

We can easily imagine retailers looking to secure exclusive rights to proprietary genetics — whether GMO or conventionally bred — on produce and meat as the genetic revolution advances. These are products with a difference and combined with culinary technique and desirable packaging — this kind of private label will please consumers and grow the business.

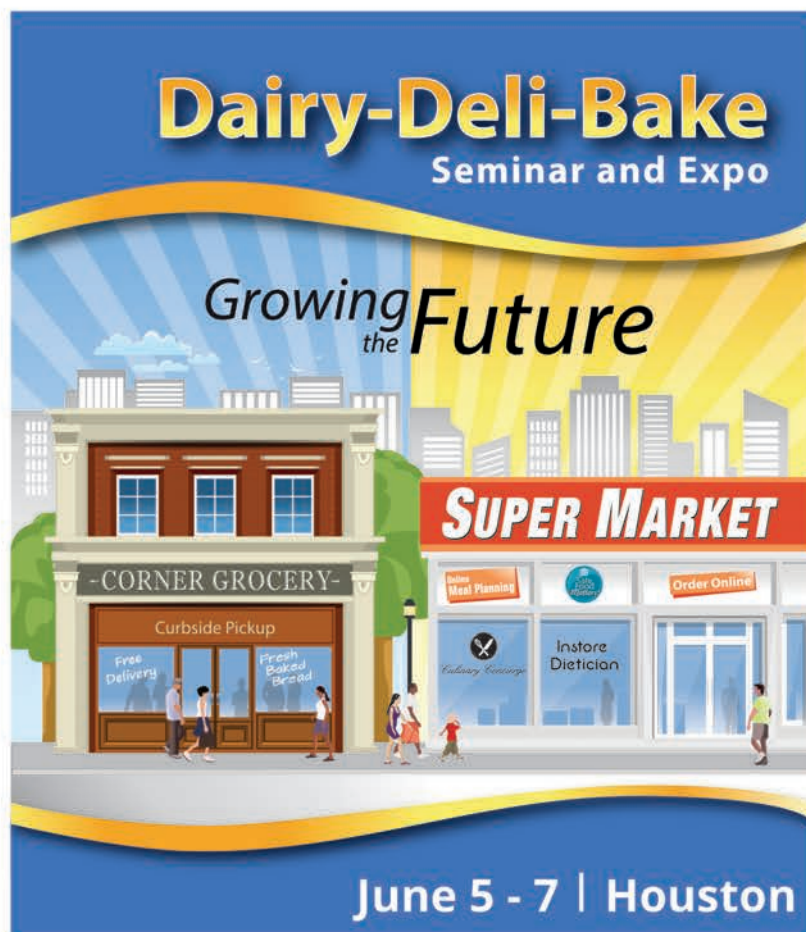
Conversely, simply sucking the margin out of the category won't help manufacturers, consumers or retailers themselves. **DB**



James F. Prevor

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by Lee Smith, Publisher

Let The Deli Drive Total Store Sales

Far more than a convenience in the supermarket, deli departments are quickly becoming the driver that makes a store a destination. The center of the store is now the section supplying products that can be found anywhere with little differentiation between outlets.

Sure, one retailer may have more variety, cheaper prices or specialty products, but with online options, easy to monitor competitive pricing and multiple formats, traditional retailers are finding it more difficult to become the primary food destination.

Customers are moving to the perimeter, where foods are simpler, cleaner and fresher. These departments — produce, fresh meat and seafood, deli, cheese and prepared foods — are seeing growth and attracting younger customers.

The deli department is unique in its ability to deliver top quality prepared food options. However, in order to achieve success and deliver on the promise of being the destination driver, retailers need to be aware of trends.

Let no one forget restaurants are tough competition, stealing “share of stomach” at every turn. From fast food to fine dining, restaurateurs watch trends, change menus quickly and adopt new technology faster than traditional retailers. However, a great deli department can change consumer behavior.

Here are five trends that will change business as usual.

- 1. Clean Labels:** Customers are becoming savvy label-readers and are looking for fewer ingredients. They do not want chemicals, they want names they can pronounce and ingredients they are familiar with. For many, it is a no-compromise proposition. New regulations bring consumers added transparency and retailers more headaches.
- 2. Documentation:** Oh boy, it is coming fast and furious. Expect to see more mandated certifications, in-store HACCP plans, sanitation checklists and process charts, especially if food is going to be prepared on premise.
- 3. Umami:** Often described as a savory note provided by ingredients such as anchovies, mushrooms, soy sauce, aged cheeses and woody

flavors, umami will become more common and desired as consumers are looking for more complex favors. Remove excess sugar and salt, and the bottom often falls out of many flavor profiles leaving a thin mouthfeel and no depth of flavor. This is especially true of leaner meats and often the result of grass-fed and pasture-raised animals. Adding ingredients with a savory umami note will make flavors more complex with greater depth.

- 4. Probiotics/Fermented Foods:** We are finally realizing that cleaner living is proving to be problematic. Living in a no-bacteria world is a death sentence. These good bacteria, called probiotics, are found in many foods but primarily fermented products — yogurt, kefir, raw milk aged cheeses, sauerkraut, pickles and kimchi, for example. Currently, there is a new company called, “The Probiotic Cheese Company,” which has developed Cheddar cheese curds loaded with high levels of probiotics. Not only are fermented foods hot, they are also necessary for good health.

- 5. Prepared Food:** Prepared food programs are expanding, taking over the deli department. It is a given any prepared food must first and foremost be safe. What's different is mediocre foods just won't cut it anymore. Food must be high quality, original and delicious. It must be delivered fast. It is in this area retailers will see more tech solutions. As an example, young consumers will want to text their orders and pay at the same time, come into the store to pick up the order and leave. Solutions are quickly developed in the restaurant world and retailers will have to follow the leaders if they want to stay competitive.

Let's face it, technology is going to be the real challenge. It will make many executives nervous and insecure, but technology is progressing at a furious rate. The pace is exhilarating. **DB**





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EYE ON ITALIAN

Upscaling provides more opportunities for profits in fast-growing segment

BY LISA WHITE

PHOTO COURTESY OF VOLPI FOODS

When it comes to Italian food, the U.S. has been undergoing a renaissance in recent years. Not only is more attention being placed on quality, provenance and production methods, but the growing importance of locally-grown and locally made domestic products has helped drive awareness and demand for quality products in general.

“The concepts associated with this are very much in line with the underlying philosophy of our producers and Product of Italy overall,” says Maurizio Forte, executive director for the USA at the Italian Trade Commission, based in New York. “Our products resonate so well with U.S. consumers, especially with the growing number of those interested in specialty food and the adventurous palates of the echo-boomer generation.”

Italian deli products are the fastest growing segment of deli meat, according to research firm Nielsen, based in New York. In 2014, dollar sales of the Italian deli sub-category grew 9 percent, while through September 2015, the category accelerated to 12 percent growth.

Nielsen reports Italian deli is the third largest deli meat category after turkey and ham, which translates to big dollars for retail.



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Recent Deli Trends

There are a number of significant trends to take note of in Italian deli products.

The first is multi-meat in sandwiches. Instead of just turkey or ham, there are more Italian deli products like salami being included in traditional sandwiches to add more flavors.

"Sandwiches are obviously the largest occasion for deli meat, so this is a nice trend for retailers looking to drive higher rings in the department," says Michael Fox, senior vice president, marketing and innovation at Columbus Foods, Hayward, CA.

The second and one of the most important trends is the rise of craft charcuterie. The National Restaurant Association's 2015 What's Hot Culinary Trend report lists house-cured charcuterie as the number two trend for appetizers.

"As restaurants experiment with charcuterie more on their menus, we are seeing

this trend by making artisan-style products more accessible to consumers by pre-slicing. The company is launching a new line of pre-sliced artisan products this spring, leading with finocchiona, hot soppressata and crespone. It also is introducing a charcuterie sampler with four different varieties of salami, along with additional snacking products.

Another prominent trend in Italian food is the move to antibiotic-free meat. In response to this development, Columbus Foods' new pre-sliced artisan products are made with pork that hasn't been treated with antibiotics. It plans to extend these offerings over the next year.

"The legislation is changing, so antibiotic-free items are more prevalent than traditional items currently," says Alberto Minardi, general manager at Principe Foods USA, based in Long Beach, CA.

The company just finalized a part-

as a growing number of delis evolve from grab-and-go sections to offering higher-end prepared foods.

"Supermarkets are doing more via educational, cooking classes and demos and certainly on a daily basis with prepared food sets," says Forte.

Whereas in the past a simple tuna salad sandwich would suffice, those focusing on Italian fare would upscale the offering to Ventresca tuna packed in extra virgin olive oil dressed with diced Tropea onions served on focaccia bread.

There also are more fresh ideations on traditional Italian food preparation.

"Ease of preparation doesn't necessarily mean no preparation," says Lorenza Pasetti, chief executive of Volpi Foods, St. Louis. "A grilled cheese panini, for instance is not so plain when you combine great cheeses with pan-seared coppa slices, red onions and arugula."



PHOTO COURTESY OF COLUMBUS FOODS

an increased demand and interest in more unique varieties of salami in traditional grocery," says Fox. "While demand is still high for classic varieties, we are seeing the more artisanal types of salami, finocchiona, soppressata, etc., growing even faster."

Columbus Foods is responding to

nership, creating Principe America, a U.S. manufacturing arm, which will produce antibiotic-free and pre-sliced deli meat lines.

With so many trends converging, supermarkets are taking inspiration from foodservice operations, especially

Volpi Foods has recently introduced versatile snacking with cheese and meat combinations of prosciutto, spicy salami and pepperoni. These are sold in the deli's self-service grab-and-go section.

More of today's supermarket delis are including a variety of prepared Italian meal

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solutions to take home to heat and serve, including artisan pizza and pasta stations and self-serve antipasto bars with marinated grilled and roasted vegetables, stuffed olives and pasta salads.

Rao's Specialty Foods Inc., New York, recently launched its Lemon Cooking Sauce made in Italy using lemons grown on the Amalfi Coast.

"This line is versatile for a variety of fish, seafood, chicken or meats and can be used for baking, roasting, broiling, grilling or as a finishing sauce," says Deb Crisan, senior vice president, sales and merchandising at Rao's Specialty Foods, Inc., New York.

Principe Foods USA is experiencing a boom across the board in its Italian product lines, including artisanal cheese, salami and pancetta. This is attributed to Baby Boomers and Millennials looking for easy-to-prepare, affordable products that are either domestically produced or imported.

Selling Strategies

Innovative marketing and merchandising strategies have brought added attention to Italian foods in today's delis.

With the increased demand for Italian deli products, and the majority of bulk foods in this department being sold behind the counter, Columbus Foods is working with retailers on fresh-sliced-to-go programs for its bulk items.

"Retailers that are creating dedicated charcuterie stations in their more premium stores are seeing strong results," says Fox. "Actively merchandising with other key

charcuterie accompaniments is also helping drive rings up, from adding mustards or specialty cheeses, to wine and beer; solution oriented merchandising is a best practice that we see in some of our key customer accounts."

From a marketing perspective, salami and other charcuterie typically experience increased sales during the key three-day weekend holidays throughout the year.

Italian products' pairing ability and ease of use make them appealing to consumers and supermarkets preparing ready to go meals. In addition, a growing number of people are recognizing the health benefits of a Mediterranean diet.

"Retailers should underscore these important characteristics, create innovative take out/eat in dishes and emphasize the history," says Forte.

Consumer and staff education also remains an important priority today and is a key purchase influencer.

U.S. retail trade partners are on the front lines setting the scene and engaging the consumers with knowledge about specialty products.

"Our retail partners in deli are an invaluable ally," says Forte. "Strategic collaborative relationships are being forged across the U.S. with key retailers and specialty independent stores."

The Italian Trade Commission works together with retail partners to support incremental sales growth and vigorously



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promote authentic Italian products that currently exist within these retail portfolios, while simultaneously outlining a portfolio growth strategy that includes the introduction of new-to-market products.

"In-store promotional activations for Products of Italy executed together with our retail partners across categories, including deli, which is a very important component throughout 2016, is in the works," says Forte.

Both staff and consumer education remain important components to properly marketing and merchandising these products.

Another vital tool is to cross merchandise products across departments showing the versatility and various uses of items.

"This provides an opportunity to present the consumer with a new item several times over instead of waiting for them to stumble upon an item in a deli case," says Forte. "The ready to eat/take away is a great example of how specialty meats/salami and cheeses can be introduced to a customer, impact new sales and drive growth in a category."

More often, supermarket delis are introducing innovative Italian items in the deli cases.

As a government agency, the Italian Trade Commission is engaging retail-buying teams in multiple ways, offering experiences that translate into new products in the supermarket deli arena.

"Helping retailers identify the perfect product for their customer and portfolio is paramount for us," says Forte. "Once these products have been identified in the deli by buying teams, we collaborate and spread

the message of quality."

Marketing and promotional tactics include giveaways, trips to Italy, cooking demos, tastings, recipe booklets and blog pieces.

In addition, the Italian Trade Commission, under the auspices and direction of the Italian Ministry for Economic Development, is investing in the U.S. market with a multi-prong market approach that encompasses a multimedia communications campaign entitled The Extraordinary Italian Taste. This is aimed at celebrating Italy's offerings, educating trade partners and empowering consumers to distinguish and recognize authentic Italian products, thereby driving product sales.

"We are rolling out our enthusiasm about Products of Italy and Extraordinary Italian Taste across America, including placement on bulletin boards in Times Square and select markets, fully-wrapped double decker buses, taxi, TV, print and digital media," says Forte.

In addition to sampling, merchandising, videos of usage and recipe ideas, all strategies that pay dividends in the deli, cross merchandising is key.

"Retailers need to create a marketplace with themed Italian merchandising and presentations and offer small tastings at peak shopping hours to capture customers' awareness and sales," says Rao's Crisan.

Looking Ahead

In the years ahead, with ethnic food's popularity showing no signs of waning, it's predicted Italian foods will remain a profitable component in supermarket delis.

This includes meats, cheeses, prepared foods and a variety of other products.

"We expect the Italian deli category to only accelerate, as retailers are pushing to differentiate themselves," says Fox. "Retailers know how important the department is to the total store."

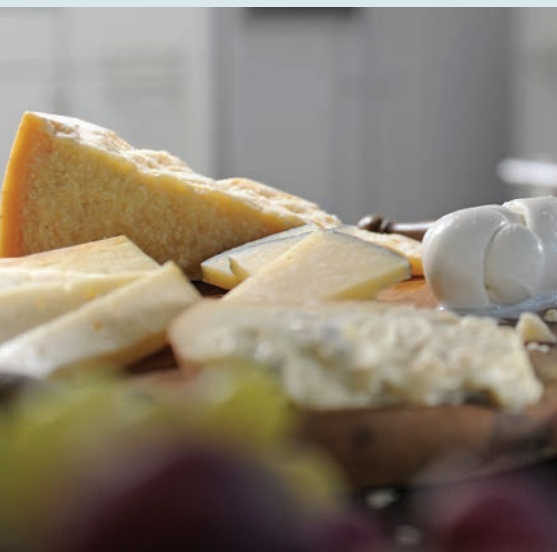
Shoppers who buy in the deli typically have a total basket that's more than twice the size of the average basket, so Italian foods can be a key driver of growth when executed well. This is especially true with items geared for entertaining and high-value accompaniments that can be paired together.

Growth is predicted and as the Italian Trade Commission reports more Italian producers are coming into the U.S. market in response to the growing demand for artisanal and specialty cheeses and meats.

"Deli items marry effortlessly with the demands of the echo-boomer generation for authentic, artisanal offerings that have a genuine story, substance and passion behind them," says Forte. "Consumers will pay for these products, seek to learn about the product history and dive into the experience."

As a result, more consumers are discovering a Mortadella Bologna IGP for the first time, understanding the delicate differences between the flavor profiles of DOP prosciutto di San Daniele and Parma, enjoying the robust flavor of air-cured and smoked speck Alto Adige IGP and trying a roasted porchetta with herbs.

"The price/quality ratio in particular of these and all Italian specialty products is incredible and another win for the consumer overall," says Forte. **DB**



▶ A LOOK AT THE NUMBERS

Imports of Authentic Italian Products as a whole remain in a prime position in the U.S., according to the Italian Trade Commission, based in New York. At the close of the third quarter 2015, imports increased roughly 1.8 percent on the whole as compared to the same period last year. (Value:\$3.2 billion inclusive of food/wine.)

Here's how it breaks down:

◆ *Italian Cheese Imports:* Increased 1.2 percent and Italy remains the number one cheese exporter to the U.S. (Value: \$217.5 million).

◆ *Italian Cooked/Cured Meats:* Increased 15.9 percent to \$30.4 million. **DB**

◆ *Italian Condiments/Sauces:* Value: \$124.2 million with a 13.2 percent increase with respect to the period last year.

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PRIVATE LABEL POTENTIAL

Sales growing at a faster rate than store brands

BY LISA WHITE

Private label lines from large chains, including Kroger, Safeway, Aldi and Trader Joe's, have become strong-selling staples, so it comes as no surprise that an increasing number of these products can be found in the deli department.

In 2014, store brands accounted for nearly three billion dollars in incremental sales overall, an increase of 2.5 percent over the previous year and more than twice the gain recorded by national brands, according to the Private Label Manufacturers Association (PLMA), based in New York, NY.

In the big supermarket channel, nearly one of every four products sold and \$1 of every \$5 of all sales was credited to store brands, reports PLMA. In supermarkets,

unit and dollar shares are currently 23.1 percent and 19.5 percent, respectively.

"Private label deli products account for about one third of deli sales and a quarter of deli unit volume," says Alan Hiebert senior education coordinator at the International Dairy-Deli-Bakery Association based in Madison, WI.

The PLMA reports store brand sales increased the supermarket channel's revenue by \$1 billion. In 2014, private label sales were three fourths greater than that of national brands, increasing nearly 2 percent compared to 1.1 percent. This raised the annual sales of store brands to \$62.1 billion, a new high. In addition, store brands accounted for close to 30 percent of all new dollars in the supermarket channel in 2014. And within the past three years, annual sales of supermarket store brands

increased \$2.5 billion, or more than 4 percent, double the sales of national brands.

The History

Private label in the deli department goes back to the earliest development of the supermarket.

"It was only natural for retailers to offer their own sliced meats and salads, since national brands did not exist 100 years ago," says Brian Sharoff, president of the PLMA. "As time went by, some national brands built a following, but over the past five years, the pendulum has swung back and retailers now offer the widest variety and best quality."

Private label products were initially created as a way for retailers to differentiate their stores and for delis to provide a service of sliced lunchmeat and cheeses to

customers. It evolved to include basic prepared sides and meals. Today, many deli areas have also evolved to include high-end cheeses, snacks, nuts and candy for customers.

Over the years, private label products were, in the public eye, commoditized and often labeled generic. In the majority of these cases, these items were thought of as being inferior in quality.

That is no longer the case, particularly in fresh foods.

"Retailers who feature private label items have an opportunity to create something unique that can make their stores true destinations," says Hiebert. "The challenge, of course, is creating that signature item."

It can be a gamble. If private label items fall short in shoppers' minds, the risk is the loss of repeat purchases.

"Publix has done a great job in positioning its private label lines to be established brands," says Claas Abraham, chief executive and president of Abraham of North America, based in Lincoln Park, NJ. "Many other retailers have also been successful in positioning these products as quality items, rather than low cost knock offs."

Private label lines are typically more traditional products that are fast-moving, as opposed to specialty items.

The deli area can become a solutions center for these products to drive incremental volume by better meeting the needs of its customers for prepared meals, snacks, sides and entertaining occasions.

"Research indicates that at 4 p.m. almost one-third of consumers do not know what they are doing for dinner," says Kim Holman, director of marketing at Wixon Inc., based in St. Francis, WI. "This provides a significant opportunity for the retailer to help these consumers with a dinner game plan [that includes private label options]."

Fall River, MA-based Blount Fine Foods initially introduced its soup wall in New York City 25 years ago at neighborhood markets. The products would be available in 20- or 32-ounce cups on deli shelves among the meats and cheeses.

"Supermarkets came to us about 22 years ago wanting to emulate Manhattan's wall of soup," says

Robert Sewall, Blount Fine Foods' vice president, sales and marketing. "It was all about mimicking the great New York City delis and soup was big part of that."

Today, the company's private label lines can be found in stores like Wegman's and Mariano's, where these have become a staple in prepared food programs.

The Trends

There are several private label trends currently emerging in today's deli departments.

Although prepared meals are now typically a part of these departments, selections have evolved to provide more variety and options for families.

"Instead of purchasing four individual meal containers, consumers are able to purchase a full meal for their families in the grab-and-go sections," says Holman. "[Private label] prepared meals are available in more options for consumers."

As the deli balances healthy ingredients with indulgent flavors, there have been a variety of private label snack options that incorporate ancient grains and seeds as well as fruits and vegetables.

Although the majority of today's delis focus on basic options and flavors, there also is an opportunity for the deli area to provide more ethnic private label options for consumers.

"There has to be a strategy and the program must be marketed to drive the awareness and trial," says Holman. "Asian, Indian, Mexican, South American, Cuban and even regional U.S. barbecue could have a home in the deli area."

In terms of unique and ethnic flavors, soup has had a long history in this regard, yet deli entrees are more recently jumping on the bandwagon.

"We're bringing in a mix of ethnic comfort foods, such as Sweet and Sour Beef, Turkey Bolognese and Chicken Biryani, an Indian dish containing chicken, basmati rice, chick peas, spices and coconut milk," says Sewall.

In addition, there are many attributes of private label items that are now emulating top brands, since an increasing number of consumers are seeking cleaner labels and non-GMO ingredients as well as organic and natural products.

Abraham of North America focuses on claims and callouts with both its branded and private label lines.

"People are still eating decadent products, but they seek ingredients that are clean and high quality, the simpler the better," says Blount's Sewall.

Although pure organic consumers make up just 2 percent of the population, the company is seeking to appeal to the other 98 percent with its traditional soup recipes that also are organic.

Sugar Creek Packing Co., located in Washington Court House, OH, has been in business for 50 years, yet its entrance into the deli department is relatively recent. The company provides branded and private label bacon products, such as bits, turkey bacon and jerky, for foodservice operators and retailers.

"Supermarket perimeters continue to grow, and retailers can differentiate these areas from the center of the store [with



private label items],” says Lance Layman, Sugar Creek’s vice president of business development.

The company regularly meets with retailers to understand unmet needs and figure out how to add value to their business and store brand.

Sugar Creek’s most recent focus has been on back of house foodservice, with the goal to combine vegetables, starches and meat for meal replacement options.

“Currently, we’re looking at proteins and back of house execution,” says Layman. “In that arena, it’s about stealing share of stomach and wallet from quick service and fast casual foodservice operators.”

Challenges And Advantages

With private label products, the challenges and advantages for deli departments are no different than other parts of the store.

“Private label requires high quality to attract and keep customers happy,” says PLMA’s Sharoff. “It also requires innovation and creativity. Prices must always be competitive.”

Yet, high-end, niche products are not a good fit to make into store brands because, from a manufacturer’s standpoint, items need to be viable in terms of turnaround.

“Stores and manufacturers have taken

fast-turning items and made these into private label, while streamlining pricier, branded products,” says Abraham. “As a result, there are more private label items in the deli now compared with even five years ago.”

One of the biggest challenges with store brands is volume, as movement is crucial for these items.

“Smaller retailers, in particular, may have difficulty getting what they want under private label,” says Abraham.

Other big issues are typically execution, speed and consistency. Like branded products, private label items are defined by reliability factors, such as quality and taste.

However, once a private label line is established and consumers trust it, the store becomes a destination for these products.

The advantages are loyalty to the store, better margins and a stronger retail image, says Sharoff.

“[With private label products], it’s not about the customers stores have, it’s about customers they want,” says Sewall. “It’s important to get people to think outside the box.”

To best accomplish this, retailers need to look at who their customers are, present opportunities in an appealing way, include informational signage and make the decision an easy one.

There are some categories where private label is not as prevalent.

Conroy Foods, maker of Beano’s Deli Condiments, has been involved with a variety of private label deli condiment projects over the years. In most cases, these have not been successful.

“Through feedback from our customers, we have discovered consumers do not prefer private label condiments in the deli,” says Jim Conroy, owner of the company. “Private label products work well in the center of stores, where these compete with national brands. When national brands are removed from the deli and replaced with relatively unknown private label items, consumers tend to react negatively.”

This is because, in some cases, deli private label products compete with the item’s counterpart in grocery, which are normally sold at a lower cost for the same item.

For retailers looking to enhance private label items in the deli, it’s important to determine what products are viable and communicate with the manufacturer to discuss minimum volume requirements. Lead time also is a factor in some cases.

For example, Abraham of North America requires a four-week lead time for its products, which are imported.

“Delis need to continue evolving and providing more [private label] solutions to their customers,” says Holman. “The deli area needs to be re-imagined as a quick solution center for customers.” **DB**

U.S. SUPERMARKETS	DEPT SALES 2014	% CHG*	P.L. SALES 2013	P.L. SALES 2014	% CHG	P.L. SHARE 2013	P.L. SHARE 2014	% CHG
TOTAL DELI DEPT.	\$6,390,933,987	1.2%	\$2,123,563,667	\$2,163,254,860	1.9%	33.6%	33.8%	0.2
Deli Fruit & Fruit Salads	\$492,906,180	-8.2%	\$151,311,889	\$154,783,259	2.3%	28.2%	31.4%	3.2
Prepared Horseradish	\$38,686,456	-3.9%	\$1,080,780	\$1,118,322	3.5%	2.7%	2.9%	0.2
Refrigerated Pizza	\$132,850,980	-6.4%	\$78,294,248	\$75,479,149	-3.6%	55.2%	56.8%	1.6
Deli Salad Dressings	\$280,951,640	3.3%	\$5,500,289	\$3,989,638	-27.5%	2.0%	1.4%	(0.6)
Deli Sandwich Spreads	\$51,268,243	7.0%	\$27,381,479	\$30,838,512	12.6%	57.1%	60.2%	3.0
Deli Sandwiches	\$1,041,923,060	-0.8%	\$195,169,214	\$210,917,863	8.1%	18.6%	20.2%	1.7
Deli Sauerkraut	\$44,793,049	5.2%	\$8,809,305	\$8,747,738	-0.7%	20.7%	19.5%	(1.2)
Entrees, Lunch Packs & Ready-made Salads	\$4,307,554,378	2.9%	\$1,656,016,463	\$1,677,380,379	1.3%	39.6%	38.9%	(0.6)

Chart from PLMA, * P.L. = Private Label, % CHG* = percentage of change 2013 to 2014



TARGETING TIME STARVED HUNGRY SHOPPERS

Grab-and-go foods provide the perfect antidote
By Carol Bareuther

Time-starved shoppers hungry for a meal or snack are increasingly looking to the supermarket deli for their grab-and-go food needs. In fact, the number of fast food purchases made at retail per customer between March and June 2015 was more than six visits higher than those to quick serve restaurants (QSR) in an average 4-week period, according to data from the Port Washington, NY-headquartered NPD Group's QSR Plus Retail Market Monitor.

"Deli operators have started to realize they are competing with restaurants.

Consequently, there has been a tremendous uptick in prepared foods in the deli. It's all about capturing customers' share of stomach," says Bob Sewall, executive vice president of sales and marketing at soup and side manufacturer, Blount Fine Foods, in Fall River, MA.

By offering easy-to-grab fresh flavorful foods in handy to-go packaging in a destination setting, deli operators can satisfy a consumer's craving for convenience. This fits the bill for the mother who wants a one-stop shop for staples and the family's dinner at the same time, the worker who prefers a speedy lunch to sit-down restau-

rant fare and those who like to dashboard dine on snacks throughout the day.

Health and freshness are two big trends driving what customers are looking for in grab-and-go deli foods.

"Deli shoppers seek healthy alternatives to QSR offerings, which often allows for differentiation from the fast-food options in the area," says Jonathan Whalley, education coordinator for the Madison, WI-headquartered International Dairy-Deli-Bakery Association (IDDBA).

This translates to greater transparency on the source and quality of ingredients, such as offerings with 'clean labels' or

labels that read like a recipe rather than a chemist's formula.

"We're seeing customers' desire to eat better in two main ways. First, they want products with a clean label. In other words, real dairy and real clams in items like New England Clam Chowder. Secondly, there's greater interest in organics, gluten-free and antibiotic free. Upgrading menus has been a trend in foodservice and now customers want it at retail," explains Blount's Sewall.

The desire for freshness is equally paramount.

"No longer are shoppers willing to settle for a sandwich that's sat in the chiller for two days," says Steve Olk, category manager for Planglow USA, a label and compostable packaging manufacturer based in West St. Paul, MN. "All age groups, from Millennials to Baby Boomers, and all income demographics are looking for that signage or sticker that says 'made fresh today.' Customers are willing to pay more for this higher quality experience."

Food Fast, Not Fast Food

The components of a register ringing up a grab-and-go program start with the food.

"The street food movement is creating grab-and-go opportunities that we haven't necessarily seen in the past. For example, dishes like fresh hot Asian noodles, Middle Eastern, Korean and Vietnamese cuisines are all gaining a foothold. Where traditional sandwiches and pizza once dominated the case, in the future we could see more items like the Banh Mi (a Vietnamese meat, poultry or pork filled sandwich with fresh and pickled veggies served on a French-style baguette) gain in popularity," says Olk.

Perennially favorite grab-and-go fare like soups as well as family-style sides to accompany rotisserie chicken programs remain best sellers.

"There's been a big boom in soups over the past 8 to 10 years. For example, white tablecloth restaurant chains like the Capital Grille have increased the number of soup offerings. Many restaurateurs are beefing up soups in favor of smaller portions of protein. In fact, diners today are starting to think of soups accompanied by bread, salads or sandwiches as not only lunch fare but also as a satisfying dinner that is healthy and priced at a fraction of the cost of, for example, a large steak," says Blount's Sewall.

Nearly half (46 percent) of consumers strongly agree that they visit certain restaurants specifically because they enjoy



PHOTO COURTESY OF PLACON

the soup, according to the *Left Side of the Menu: Soup and Salad Consumer Trend Report*, published by Chicago-based Technomic Inc., in 2014.

"New England Clam Chowder, Roasted Tomato Bisque, Cheddar and Broccoli and Classic Vegetable Beef with Barley Soup are staple sellers," says Mary Shepard, national sales manager at Fortun's Finishing Touch Sauces, a sauce and soup manufacturer in Kirkland, WA. The company sells its soup line in a retail pouch packed in a tub that is ready to heat-and-eat after the addition of milk or water. Each pouch makes 1 to 2 servings. Four-quart quantities are available to deli operators who have hot to-go kettle soups.

The Technomic report offers two other key facts for deli operators who want to take a bite out of foodservice soup sales. That is, 50 percent of consumers want to try new and unique soups. Plus, ethnic and innovative soups, such as Asian-style ramen and chilled varieties, are poised for growth, particularly among younger consumers.

"Traditional soups remain best-sellers, but we're seeing more interest in trendy ingredients. For example, we have a Chicken, Kale and Sweet Potato Soup. One of our new flavors is Roasted Red Pepper & Smoked Gouda. Another is our Margherita Pizza soup, which is made with real tomatoes, fresh basil and Mozzarella. This year, we'll be launching Caldo Verde, a seafood version of Portuguese Kale, Potato and Chorizo soup," says Blount's Sewall.

Last October, Blount launched a line

of side dishes that are designed to be merchandised alongside rotisserie chicken and other pre-prepared center-plate proteins. Selections include family-favorites like macaroni and cheese and loaded mashed potatoes, upscale flavors like chipotle smashed sweet potatoes and organic creamed kale and spinach.

BD&K Foods now offers its Fixin's, ready-to-serve side dishes with a southern twist, as an ideal complement to rotisserie chicken.

"Half of our products such as collard greens, butter beans, okra and tomatoes and field peas and snaps are favorites in the South. The other half are ones everybody loves like kernel corn, macaroni and cheese, smashed potatoes and green beans with potatoes," says Kevin Jordan, president and co-owner of the Columbus, GA-headquartered provider of premium fully-prepared, southern-style vegetables.

The sides come in 1-pound handled pouch bags that deli operators heat in a steamer and then display next to chicken in the hot case at dinnertime.

Grab-and-go eating is no longer limited to certain times of the day.

"Traditional meal time has been replaced by snacking at any time of the day or night. Good quality and convenient food offerings eaten at home, at the office or on the go will continue to expand," says Marilyn Stapleton, director of marketing for Anchor Packaging, in Ballwin, MO.

Half of all eating occasions are snacks, according to the IDDBA's October 2015-released, *Snacking Opportunities: Building Better Snacks*. What's more,

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Mmmm...
snack time!





PHOTO COURTESY OF ANCHOR PACKAGING

this report reveals that 61 percent of people surveyed opted for healthier snacks, 53 percent chose smaller portions and 47 percent said they enjoyed anything new and different.

"Being on the go or in a hurry doesn't mean junk food is the only option," says Lori Bigras, senior marketing manager for Green Giant Fresh, managed by Growers Marketing, LLC, in Salinas, CA. "Green Giant grab-and-go Hummus Snack Cups will add flavor, as well as nutrition, to your customer's snacks and lunches."

The 2.5-ounce cups are sold four to a box and available in two flavors, Classic and Roasted Red Bell Pepper. They can be merchandised with other dips, salsas and spreads, or included in the deli's own cut vegetable cups or trays.

Olives are also gaining traction for snacking.

"Our most popular grab-and-go olives are our pre-packs. These include everything from an Olive Medley to Tropical Olives," says Patty Amato, director of sales for Farm Ridge Foods, in Islandia, NY, which manufactures and markets these items through its Olive Branch division.

Pack-To-Go

A profitable grab-and-go program is as much about the packaging as it is the food.

"Deli operators and manufacturers require packaging that fits all of their functional criteria but offers features that add additional benefits or may be a little unique or novel in approach to garner consumer attention," says Jeff Lucash, vice president of sales for Placon, a Madison, WI-based plastic packaging maker. "For salads, for

example, we're not just seeing traditional veggies, cheese and croutons for toppings, we're seeing a wider variety of topping combinations to pull consumers away from quick service, fast casual and traditional dining options."

The company's newest thermoformed plastic product lines, GoCubes and Selectables, allow customization of salads through the use of single or divided insert trays for toppings. These inserts enable both wet and dry toppings to be separated from each other but combined in a single container that allows food to stay fresh and crisp.

Lucash says one of its innovative customers puts Bibb lettuce in the base and then buffalo chicken, diced tomatoes and avocado in the insert for merchandising a 'make your own buffalo chicken wrap' meal. Both containers can be used with or without the insert trays for even more versatility. For example, GoCubes has a universal lid and when used without the insert, can be utilized for snack mixes, fruit salads, pasta and potato and leaf salads.

Flexibility is ideal to give deli operators the widest menu of grab-and-go offerings while minimizing packaging inventory.

"We offer 2- and 3-compartment, medium and large size, clear PET-plastic snack boxes that retailers can use for sandwiches or snacks like cheese and crackers or celery, carrots and peanut butter," says Jason Horbac, assistant product manager for supermarkets and processing at the Sabert Corporation, in Sayreville, NJ.

For heat-and-eat prepared foods, Anchor Packaging introduced its new "WAVE" series MicroRaves packaging

last year. These upscale microwavable polypropylene black bases and leak-resistant, anti-fog clear lids come in a variety of shapes and sizes and provide a quick and easy way to reheat prepared meals.

"This new packaging offers an ergonomic design for ease of use and attractive, smooth sidewalls to maximize the display space with eye-catching yet functional products. Crystal clear lids allow the various foods to shine through allowing the shopper to mix and match their families' meal preferences," says Anchor Packaging's Stapleton.

Make It Easy

Presenting meal and snack choices in a simple and easy-to-decide way is the ticket to success for deli grab-and-go programs. The two best ways to accomplish this are through cross merchandising and meal bundling.

"Create a grab-and-go section in the cold case by cross merchandising sandwiches, salads and soups along with water and juices. This gives shoppers a way to grab what they want in a timely fashion and go out the door," suggests Blount's Sewall.

Bundling is huge. In fact, more than half (51 percent) of consumers say it is important that soup be bundled with other items and 60 percent say the same about salads, according to Technomic's 2014 *Left Side of the Menu: Soup & Salad Consumer Trend Report*. Additionally, 58 percent of consumers say they are more likely to order soup as a combo meal than as a single item.

"Add 8-ounces of soup for 99-cents to the price of a salad or sandwich and advertise it as a combo meal. This entices customers away from QSR or fast casual restaurants, gets the average ring of the check up and still makes money," says Blount's Sewall.

Deli operators can do the same with rotisserie chicken and sides.

"Bundle a chicken with choice of two of our Fixin's, bread and a beverage. Depending on the area of the country, retail margins and aggressiveness of pricing, a meal deal like this sells for anywhere from \$11.99 to \$17.99 and feeds a family of four. Display all the components in one place and sign it well. Customers love it. They don't have to wait in a line. They can just grab a delicious healthy meal for their families and go," says BD&K's Jordan.

DB



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TAKING PIZZA IN NEW DIRECTIONS

Capitalizing on trends to drive sales in the deli

BY CHRIS AUMAN

With flatbreads becoming such a hot item, both in foodservice and grocery aisles, Fresno, CA-based Valley Lahvosh is more than happy to cater to this fast-growing trend with larger sizes as well.

For Jenni Bonsignore, marketing manager for Valley Lahvosh Baking Company, the company's products fit the bill perfectly. "We make two sizes of Valley Lahvosh that are perfect for use as a pizza crust — 15-inch Round Lahvosh and 5-inch Round Lahvosh," she says. "The larger 15-inch size is by far the bigger seller so, at least for us, larger sizes remain more popular."

While larger sized offerings are still in high demand, choices of smaller sizes hold appeal to single consumers who primarily shop for themselves and like Millennials, many are also looking for bolder flavors. This is something Greg Caloia, marketing communications specialist for Utica, NY-based Deiorio's Frozen Dough can attest to.

"Larger pizzas work great for groups that are looking for something traditional everyone can share and enjoy," says Caloia. "However, there's an increased demand for small, more personalized pizzas that feature non-traditional toppings like buffalo sauces, bacon, and/or chicken to name a few."

Retail Follows Foodservice

Trends for the pizza category in retail deli sections tend to follow what consumers are already finding in restaurants and pizzerias. This includes new non-traditional toppings and flavors for crusts.

"I think some of the general pizza trends are finding their way into the deli section," says Bonsignore. "Consumers are more willing to consider non-traditional toppings and crusts for their pizzas, either to make pizza healthier or more upscale."

Maria Buitron, marketing associate for Little Lady Foods, Inc., headquartered in Elk Grove Village, IL, has also taken note of the healthy and spicy trends.

"Kale continues to have a strong presence and is perceived as a healthy food choice. Sriracha still seems to be on-trend as are Korean flavors," she says.

Incorporating healthy, bold flavors into pizza sold in deli sections can capitalize on this desire for new and innovative ingredients.

The Valley Lahvosh style of flatbread offers a healthy option for consumers as well. "Though Valley Lahvosh has always been used as an alternative pizza crust," says Bonsignore. "We are seeing much more interest in using Lahvosh in this application as it has become more mainstream. Using Lahvosh for the crust easily makes the pizza more of a gourmet option and as a plus, it's also a 'better for you' choice."

Flatbread, health halo, bold flavors and clean labels, these are all buzzwords for what is trending in supermarkets and foodservice locations across the country. The pizzas sold refrigerated in supermarket delis are certainly not immune to changing tastes and these food trends are reflected in the offerings consumers demand. By taking advantage of these trends as well as customers' preferences for upscale premium products and spicy ethnic flavors, retailers can give the quick, convenient appeal of pizza an added boost by emphasizing healthy and flavorful aspects to increase rings in the deli section.

Size does matter. For busy shoppers looking to purchase restaurant quality pizza to take home to their families, bigger is better, especially when saving money is the goal. "Consumers are definitely looking for value," says Bradford Sterl, chief executive of Rustic Crust, based in Pittsfield, NH. "We're seeing a demand for family-sized products, like a 16 inch or large rectangle."

According to Sterl, Rustic Crust is also receiving an increase in requests for pizza kits, so deli departments that add value to the purchase with kits or two-for-one deals can increase sales.





Caloia at Deiorio's has also seen a move among some shoppers away from more traditional dough, saying, "While traditional white pizza dough is always popular, we've noticed a trend towards more unique options on both ends of the spectrum with regards to the thickness of the dough. Most people in the deli section though, are looking for a thinner, "New York," style crust."

Deb Crisan, senior vice president, sales and marketing at Rao's Specialty Foods, Inc., based in New York, suggests deli

executives cater to more adventurous consumers by highlighting alternatives to traditional tomato sauce. "For additional suggestions to create various trendy or artisan style pizzas, I suggest using Rao's Artichoke Sauce, Roasted Eggplant Sauce, Vodka Sauce, 4 Cheese Sauce or Garden Vegetable Sauce. They are all delicious."

"Some great items we're rolling out this year that fit in perfectly with delis in particular include a line of topped 11-inch pizzas that feature different sauce and cheese combinations. These range from a stan-

dard tomato sauce to garlic, buffalo, and even barbecue."

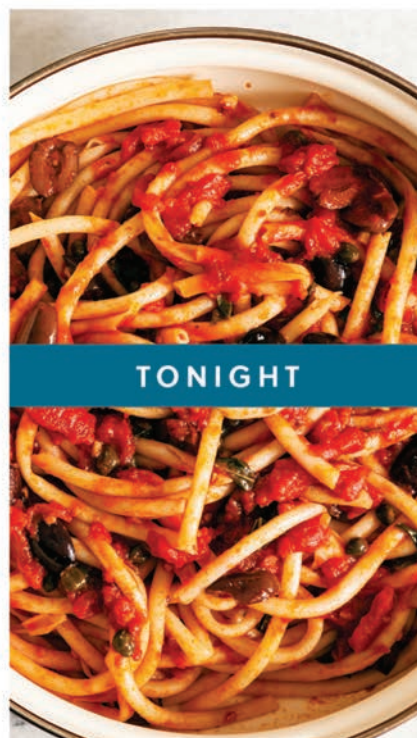
Deiorio's also capitalizes on these trends in its line of breadsticks. According to Caloia, "Additionally, we have a full line of breadsticks rolling out that make for awesome snacks to go along with just about anything. We have a fully topped garlic and cheese option as well as un-topped white, wheat blend, and even sweet breadsticks so businesses can offer customers a wide variety."

Topping It Off

It's not just restaurants that are informing consumer tastes. Trends in pizza sold in the frozen food section also influence the refrigerated pizza sold in the deli section. This is something Rustic Pizza keeps in mind when researching and developing flavors for new products.

"People are asking about bolder ethnic flavors," says Sterl. "Asian influenced offerings, such as orange chicken and Thai pizza with spicy peanut sauce, are in the research and development phase."

East Asia isn't the only area exerting flavorful influence in deli pizza, a taste of India could soon be brought to market.



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"We've looked at tiki masala," says Sterl. While these new pizzas will be offered in the frozen section first, success there could see the pizzas in the deli as well.

"We're looking at the deli area strategically as a great opportunity for these products. We have a line of crust products that will be very focused on the deli, like a naan and a couple other similar flatbreads that we're going to launch in mid 2016 in the deli area."

Sterl also says there has been an increase in retailer requests for pork as a pizza topping. "A lot of people are asking about pork, like pulled pork or sliced pork," he says. Jalapeños are also being introduced to give pizza a boost of heat and consumers are rethinking their cheese options too. Unique cheese requests are another trend, which includes goat cheeses as well as cheeses infused with sage and rosemary — whatever is outside of the traditional Mozzarella.

"I think retailers are looking for something new," observes Buitron at Little Lady Foods. "That is why we introduced Rising Crust Flatbreads in four varieties: Roasted Vegetable, Double Pepperoni, Sausage and Kale, and Southwest Style with Chorizo."

Healthy Choices

While pizza may not be the first thing consumers think of when choosing healthy foods, it is still top of mind for many shoppers and can impact their decisions in the deli. "I think consumers want to make better food choices and are far more educated about food in general," says Bonsignore.

"Valley Lahvosh has always been a healthy option so other than removing trans fats from our product more than seven years ago, we haven't had to make any major changes to the product. In our foodservice line, we have added a Whole Wheat Lahvosh option in response to feedback from customers."

"The healthy movement has definitely played a factor in consumers' increased desires to have thinner crust options as well as what are considered healthier toppings," says Caloia at Deiorio's.

"To keep up with this demand we have developed a full line of sheeted thin crust raw dough that offers our customers an easy to use fresh product that varies from a traditional pizza."

Rao's Specialty Foods is committed to its healthy pizza sauce, which is made

in Italy. "We do not add sugar, water or tomato paste to our pizza sauce," she says. "It is all natural and gluten free — a very healthy choice for consumers."

Rustic Crust's Sterl notes gluten free is gaining ground with consumers.

"There's also a lot of people asking about gluten free and allergy friendly products in the deli," he says. "There continues to be an interest in clean label as well as ingredients you trust and recognize."

Consumer demand for gluten free does not seem to be showing any signs of a slowdown, and it does not stop at pizza dough. According to Caloia, this trend isn't going away anytime in the foreseeable future and Deiorio's has responded to consumers' desires for gluten free.

"That's why we've added onto our gluten free offerings by now offering not one, but two styles of gluten-free par baked shells," he says. "One is a thinner, kind of flatbread-style crust and the other is a fluffier, more traditional style pizza shell."

Clearly retail executives looking to drive pizza deli sales should offer consumers great new flavors, healthy ingredients, larger sizes and also the versatility of creative ingredient combinations. **DB**

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Rotisserie Chicken Keeps Getting Bigger

Meal deals may be just the ticket

BY BOB JOHNSON

Rotisserie chicken has become so popular that the merchandising question may be how many other products within the deli and beyond can be taken along on this delicious ride.

This most popular of prepared deli proteins has benefited from hitting all the important marks — convenience, healthfulness, flavor and economy — to reach an extraordinary landmark.

In the 52 weeks ended June 28, 2015, deli prepared chicken sales, with rotisserie by far the leader, reached more than \$3.8 billion, which was up more than 7 percent over the previous year, according to the What's In Store 2016 report

from the International Dairy Deli Bakery Association (IDDBA).

While rotisserie chicken continues to see solid increases, the better-for-you versions of this deli department favorite enjoy double-digit growth.

"Rotisserie chicken fits with what consumers are looking for," says Rory Biding, brand advocacy and marketing manager at Gold'n Plump, St. Cloud, MN. "It is a healthy, convenient, wholesome meal."

Gold'n Plump supplies chickens that consistently weigh 3.5 pounds, are not injected with a solution to enhance flavor or juiciness, and do not include the neck and gizzards.

Demand Looks 'Robust'

"When a retailer offers no-antibiotics-ever or organic rotisserie chicken products, incremental sales growth is in the double digits and that is before you factor in the halo of sales lift in produce and bakery," says John Moore, senior marketing manager for deli at Perdue Farms, Salisbury, MD. "Demand for 2016 looks robust, and we will have continued growth in the category."

Perdue Farms is a third-generation family operation with a special emphasis on raising antibiotic-free and organic chickens.

An important potential lift is the opportunity to build meal deals around the ever-popular rotisserie chicken.

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Meal deals built around rotisserie chicken have been growing, but there still may be opportunities for greater growth.

In the 52 weeks ended June 28, 2015, deli chicken combo meal sales fell a tick short of \$250 million, and grew nearly 5 percent over the previous year, according to the IDDBA report.

That is still, however, only barely more than 6 percent of total deli chicken dollar sales, and the demographics suggest that the meal deal is the future.

It is younger consumers seeking more meal deals. The IDDBA survey reports 41 percent of Millennials and 36 percent of Gen X shoppers want meal deals, while just 24 percent of Baby Boomers and 23 percent of the “silent” generation do.

“As consumers increasingly face challenges at meal times these days — what to prepare, whether to cook or not to cook, whether there is enough time to shop before dinner — deli departments can move in to capture some of the business that alternative providers are tapping into,” according to What’s In Store 2016. “For example, subscription services Blue Apron and Plated offer complete meal kits to be prepared in-home, removing nearly all decision making surrounding meal time.”

Cook-Less meals that require 20 minutes or less in preparation time are a top trend, according to the IDDBA report.

“Suggested use with recipe ideas and meal bundling are important as rotisserie chicken is increasingly being used as an ingredient for that night’s meal and tomorrow’s lunch,” says Moore. “More and more you are seeing cross promotions

with bakery and produce to put together a meal package.”

The deli rather than the chicken supplier generally puts these meals packages together.

“There is some interest in cross merchandising, but most retailers want to manage their own programs,” says Bidingier.

There appears to be great potential for these deals as a survey by the National Chicken Council found the No. 1 reason for buying rotisserie chicken — barely edging out the good taste — is that it offers a very convenient, quick-and-easy meal. The related benefit that the chicken is already cooked or prepared ran a strong third in this survey.

The impact rotisserie chicken in particular and prepared chicken in general already has in other areas of the deli and throughout the store adds up to billions of dollars a year in sales of complementary products.

“Deli prepared chicken is connected to 30 other categories within the store, according to data from Nielsen Perishables Group,” reports the IDDBA. “Shoppers who buy prepared chicken also buy bakery cakes, packaged salads, dairy, yogurt, bananas, value-added fruit and bakery bread. Such connections offer opportunities to cross-promote items from throughout the store and give shoppers a better overall experience while offering suggested pairings and meal ideas.”

Higher quality may be particularly important in attracting some of the younger consumers who are already more interested in meal deals.

Antibiotic-Free Goes Mainstream

“In the last two to three years the antibiotic-free chicken became more mainstream,” says Ted Maguire, chief sales officer at Hain Pure Protein in New Oxford, PA. “We’re seeing a real shift with the conventional grocers. They’re stepping it up with the organic as well. The big groundswell now is from the Millennial customers.”

Hain Pure Protein produces antibiotic-free, vegetarian-fed, humanely raised poultry, including its organic FreeBird chicken from family farms in Pennsylvania Amish country.

“Consumers will pay more for antibiotic-free or organic rotisserie chicken, provided they have visibility behind the brand,” says Maguire. “Conventional rotisserie might be \$5.99 to \$6.99, while antibiotic free can be from \$7.99 to \$9.99.”

It helps in coaxing consumers out of an extra two or three dollars for a rotisserie chicken if the bird has a familiar and trusted name attached.

“Highlight the brands,” says Maguire. “With our customers the information will be on the dome. It’s all about authenticity and integrity. We’ve had tremendous expansion on rotisserie, and we’re all antibiotic free and organic. It’s not just a sidelight with us.”

Artisan, craft or family farm brands matter, in particular, with younger relatively upscale consumers.

“Retailers are courting the Millennial demographic with local, craft, and fermented foods; international flavors; and greater connection between the store and community, which can be accomplished

through seasonal events, tastings, cooking demos, prepared meals and recipe offerings,” according to What’s In Store 2016.

This demographic is already taking higher quality, more healthful rotisserie chicken on an upward trajectory.

The biggest gainers in the category are rotisserie chickens and rotisserie parts that contain no antibiotics, are organic, offer different cuts and have the kind of clean labels the rotisserie shopper is looking for, says Moore. “Millennial shoppers are among the heaviest and most loyal at the retail deli, and they look for food that is free from antibiotics and artificial ingredients.”

Younger consumers also may hold the key to growing the demand for new, interesting, bold flavors.

“Flavors do matter,” says Bidinger. “Consumers are looking for flavors they see in restaurant applications. There is an appetite for stronger flavors, but it depends on geography and age groups.”

There is strong demand for a smoked, prepared deli chicken, which appeals to many of the upscale consumers looking for protein that is healthful yet interesting.

“Our sales are up more than 40 percent over 2014 on whole chickens,” says Don Bergman, director of sales and marketing at Nueske’s Hillcrest Farms Meats in Wittenberg, WI. “We sell individual breasts

that weigh 6 to 8 ounces each and whole chickens in a package.”

Nueske’s offers a variety of Applewood smoked pork, beef, turkey and chicken products.

“A lot of it goes to the deli,” says Bergman. “It’s definitely used for ingredients in pizza, breakfast omelets, quiche, bruschetta and salads. The whole bird is different from rotisserie. You could heat it up and serve it, but it’s not really in direct competition.”

Dark Meat Items

Another area promising the potential for even more growth is rotisserie preparation of the more economical parts of the chicken.

“Dark meat items like leg quarters will be more commonplace in 2016 because of value, ample supply, easy execution and new deli shoppers,” says Moore. “I am seeing less and less rotisserie flavors and more and more focus on product execution with multitiered rotisserie programs with chickens that contain no antibiotics ever and organic offerings.”

Rotisserie chicken also can be promoted as the protein ingredient in a variety of dishes.

“We now commonly see recipes that say start with a fully cooked rotisserie

chicken, remove the meat and then mix with other ingredients,” says the Chicken Council’s Tom Super, vice president for communications. “For example, we make chicken tortilla soup at home using a rotisserie chicken.”

It is extraordinarily popular now, but rotisserie chicken took a long and winding road to the top of deli prepared proteins.

“Rotisserie chicken was relatively big in the ‘50s and into the ‘60s, but it was from mom-and-pop local delis,” says Super. “Consumers were reluctant to pay \$2-plus for a cooked bird when they could buy a 29-cent per pound chicken for less than a dollar and spin it on a mechanism on their backyard grill or even in their kitchen ovens. But fried chicken from KFC and others pushed rotisserie off the menu. When Boston Market re-invented rotisserie in the ‘80s, it was a bit of a game changer, proving nothing is new, only different and better.”

Convenience and good taste have been the important qualities behind the growth of deli rotisserie chicken.

“Rotisserie chicken has become very popular in the United States in the last 25 years precisely because it has made it so easy to pick up a fresh, tasty, affordable and convenient main dish on the way home from work,” says Super. **DB**



CONSISTENCY THROUGHOUT THE YEARS

Donald Skloff began working behind the counter of a busy Philadelphia delicatessen when he was just eight years old. There, he learned how to prepare salads and other foods that kept the customers coming back for more.

Inspired by this reaction, Don started his salad company, Don's Salads, in 1970 in his home kitchen. He and his wife, Roz, immediately became busy making their unique chopped chicken liver, which Don sold to a number of area delicatessens. Don's first product was an instant success.

Don's son Victor Skloff, who assumed leadership of the company in 1980, has expanded its product line substantially. Today, Don's offers more than 130 varieties of salads, plus dozens of other ready-to-serve foods, including grain salads, gourmet cream cheese spreads, soups and desserts.

To satisfy increased demand, the company's base of operations has also expanded – first to a 1,400-square-foot, USDA-certified plant, then to a facility 10 times larger, where Don's Food Products was based from 1987 until 2003. Don's currently operates out of a 30,000-square-foot state-of-the-art facility in Schwenksville, PA. These moves have further ensured that Don's products consistently meet the most rigorous standards of quality control and customer service. Most orders are now shipped within 24 hours, yet they are still made in the same method that Donald Skloff applied in his home kitchen.

Today, Don's Food Products can be found in gourmet food stores, supermarkets, restaurants, delis, hospitals, schools and military installations.



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