

Ham Passion TOUR



A recent study conducted by ASICI reveals the enormous potential of Iberian Ham in international markets.

75% of Europeans are aware of the quality and excellence of Iberian Ham, and two out of every ten people would consume more.

65% of Europeans consulted said that they consume it, although this figure varies from 49% in France, 58% in the United Kingdom, 66% in Germany and 84% in Spain, according to the survey conducted by ASICI as part of the *Ham Passion Tour* promotional campaign. More than three quarters of those interviewed think they will continue to consume Iberian Ham in the future and two out of ten believe they will consume more.

Consumer trends: A whole leg, Spanish style, sliced or in blocks? Half of Europeans state that they buy it sliced from the leg and 35% purchase vacuum-packs, Whereas, the traditional whole ham leg continues to be the most popular in the Spanish market

(26 June 2019) Quality, traceability, transparency, and now, increasingly international expansion, are the strategic pillars on which the Iberian Ham sector is founded and on which it will consolidate its future. The “*Ham Passion Tour. Ham, The Passion of Europe*” 2018-2020, launched by the **Interprofessional Association of the Iberian pig (ASICI)** one year ago under the brand name Iberian Hams from Spain, with the support of the EU and a budget of nearly 6 million euros, has enabled the product to take giant steps in consolidating Iberian Ham in strategic markets such as **France, Germany and the United Kingdom, as well as Spain**. In the first year of the campaign alone, the message has reached more than 265 million potential consumers, achieving more than 50 million hits in the European press, exceeding the originally established targets by more than 165%, which gives an indication of the unprecedented level of acceptance achieved by a Spanish product generated by a global campaign.

We now have new data that shines a light on how the promotional actions have increased the level of awareness and intention to buy. Specifically, research by the **Ikerfel Market Research and Strategic Marketing Institute** has measured the impact of the **Ham Passion Tour** awareness-raising campaign through quantitative analysis as well as online and face-to-face interviews with consumers and professionals.

65% of Europeans consulted in the survey say that they consume it to a greater or lesser extent, although this figure varies from 49% in France, 58% in the United Kingdom, 66% in German and 84% in Spain. These figures, ASICI believes, demonstrate “the enormous potential for growth and the success of launching campaigns such as the **Ham Passion Tour** to raise awareness and improve the positioning of the product.” Two thirds of people surveyed say they know the difference between Iberian Hams from Spain and other cured hams, and in Spain this figure rises to 82%. Its high quality and flavour are the two main differentiating attributes for European consumers, followed by appearance and colour.

Among the Europeans consulted, 50% state that they purchase it “sliced directly off the leg”, 35% “vacuum-packed” and 14% the entire leg, whereas just 1% say they buy “other cuts and presentation formats” such as de-boned or in blocks. Among the notable data gleaned from the



survey, is that 92% of British consumers say they buy the product sliced, either “directly from the leg” (43%) or “vacuum-packed” (49%). **In Spain**, on the other hand, where there is a long tradition of Iberian products, 65% of the volume of Iberian Ham consumed in Spanish homes is in the form of an entire ham, according to the consumption figure published by the Ministry of Agriculture, Fishing and Food.

One of the other conclusions of the survey is that more than three quarters of those interviewed think they will continue to consume Iberian Ham in the future and almost two out of ten believe they will purchase it more often after receiving the messages of the **ASICI** and **EU Ham Passion Tour** campaign, according to the **survey conducted by ASICI**.

Rising Exports

Meanwhile, global export data for Cured Hams and Shoulders of Ham couldn't be more positive for the industry, as it shows an increase of more than 140% in exports in terms of value in the last ten years, exceeding the figure of 448 million Euros. In 2018 alone, exports increased by more than 12%. Europe and America stand out by representing together 91.5% of total exports, the European market being the preferred destination, with nearly 80% of the value of total exports.

In 2018 **France, Germany, Italy and the United Kingdom** accounted for 72.2% of exports in value terms within the EU, and 54.3% of overall exports, according to **ICEX** figures. France, especially, stands out, with exports of over 100 million euros in value, an increase of 14.5% on the previous year in 2018. Regarding **Third World Countries**, there was a remarkable 50% increase in exports to the US last year, with up to 16.34 million euros in value. They're followed by Mexico (14.67 million euros, +7.96%), China (14.12 million euros, +42.7%) and Japan (7.22 million euros, +31.1%).

2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
184,730	201,093	226,953	239,243	291,002	311,817	354,798	361,239	404,943	448,580
	+8.85%	+12.85%	+5.41%	+21.63%	+7.15%	+13.78%	+1.8%	+12.09%	+12.69%

Figures in thousands of euros

	AFRICA	AMERICA	ASIA	EUROPE	OCEANIA	OTHER	TOTAL
2018	545.29	54,434.58	24,615.96	355,764.23	10,398.71	2,821.2	448,579.97
% of total exports	0.12%	12.13%	5.48%	79.3%	2.31%	0.62%	100%

Figures in thousands of euros

Presentation formats The revolution of the blister pack

In the context of the **Ham Passion Tour** campaign, producers and sellers of Iberian ham have stressed the versatility of the product, with new presentation formats in order to reach the different types of consumers in today's markets. The industry has known how to adapt to new consumer demands, especially in international markets, and although it continues to invest in the sale of entire Ham legs, in the “Spanish style” –the format that forms part of Spanish tradition and culture– firms continue to innovate to offer other formats such as slices, blocks, and deboned centres of ham.

Figures show that blister packs of sliced Iberian Ham have experienced a before and after on international markets and have become the ideal option for delighting European consumers in

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any place and at any time, with all the flavour and aroma of this jewel of Mediterranean cuisine. If you want to experience Iberian Ham at its best, it is important to follow a few simple tips as underlined in the **Ham Passion Tour**.

- ✓ To preserve sliced, vacuum-packed Iberian ham, the most important thing is to keep it refrigerated at a temperature between 5°C and 2°C. We do not recommend freezing it as it may lose some of its properties.
- ✓ If you want to enjoy the full flavour of the ham, the ideal eating temperature is 24°C. If it is stored in the refrigerator, we recommend taking it out at least two hours before consuming. We recommend that it is briefly submerged in lukewarm water and you open the blister pack 30 minutes before serving.
- ✓ To find out if it is at the correct temperature for consumption, the fat of the Iberian Ham should have a transparent appearance.

How to identify an Iberian Ham

The Ham Legs and Shoulders labelled with one of the following Standard seals are Iberian Hams, without any room for doubt. The seal should be one of these four colours, and display the ASICI logo.

- The **black seal** corresponds to the 100% Acorn-fed Iberian Ham, from a 100% Iberian animal, the pig's mother and father being 100% Iberian Breed, registered in the Studbook; reared in freedom in the dehesa pastures and fed on acorns and other natural resources from the dehesa during the fattening phase.
- The **red seal** corresponds to the Acorn-fed Iberian Ham, from 75% or 50% Iberian-breed animals, reared in freedom in the dehesa pastures and fed on acorns and other natural resources from the pastures during the fattening phase.
- The **green seal** corresponds to the *Cebo de Campo* Ham, which can come from 100% Iberian pigs or 75% or 50% Iberian-breed animals, fed with cereal and legume feeds and with grass from the pastures.
- The **white seal** corresponds to the *Cebo* Ham, which can come from 100% Iberian pigs or 75% or 50% Iberian-breed animals, fed with cereal and legume feeds in farms.

