

Vermont Dry-cured Meat Marketing Study
REPORT

Prepared by: Jeffrey P. Roberts

For Vermont Housing & Conservation Board
Farm Viability Program

September 15 2012

Project conducted with funding from the Vermont Farm Viability Program
And the Vermont Agriculture Innovation Center

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In July 2012, VHCB's Farm Viability Program contracted with Jeff Roberts to conduct a marketing study for possible future Vermont dry-cured meat products. The study scope of work included the following objectives:

- Collaborate with the VHCB Farm Viability Program in developing a marketing study for Vermont dry-cured pork products, focusing on demand in both urban markets of the Northeast and retail/wholesale markets in Vermont.
- Provide a final report that includes: summary of findings; description of how research was conducted; specific market feedback received; conclusions; contacts list of markets by region to be shared with Vermont producers of dry-cured pork and other meat products. Specific questions to be addressed include:
 - What specific dry-cured products, including less common, nose-to-tail products, are retail and wholesale markets most interested in sourcing from Vermont producers?
 - What are retail and wholesale markets willing to pay for these products (if produced in Vermont)? What volume might they purchase/what volume do they currently purchase?

This report is divided into the following sections:

- An executive summary of findings
- Description of research methodologies
- Conclusions
 - Description and analysis of data and interview results
- Appendices
 - Interview survey form
 - List of interviewees with contact information.
 - List of contacts who did not respond to requests for interviews
 - Pricing data for:
 - National and regional cured meat producers
 - Wholesale and retail businesses

Executive Summary

- Based upon interviews and online resources, I can say with confidence the Vermont, regional (New England, New York, and Pennsylvania), and national markets for dry-cured meats are strong and growing. From the national director of sales for Creminelli Fine Meats to owners of small curing operations to wholesalers and retailers of all sizes, they are enthusiastic about a renaissance of American artisan dry-cured meat products.
- The growth of American craft beer, followed by artisan cheese, created a strong foundation for the emergence of a wide variety of new fermented foods over the past ten years. As consumers looked for high quality, organic, local and definitely safer fresh dairy, fruits, meats, and vegetables, their demand fueled a need for more precise processing. Witness the “butcher or cheesemaker as rock star” status and we begin to see the power of a changing marketplace and media attention.
- Of the sixteen interviewees, half are producing dry-cured meat in a FDA certified facility; in process to establish an approved building and HACCP protocols; or in planning stages.
- To realize the potential of an emerging market for dry-cured meat, Vermont producers must achieve a critical benchmark to succeed: whatever they make, it must be distinctive and of consistent high quality!
- Across the board, the wholesale, retail, and restaurant interviews highlighted the same positive statement: make a great Vermont dry-cured meat and I will buy it!
- Engage Vermont chefs in product development and marketing. For some types of dry-cured meats, chefs are the best first step for a producer looking to sell new items.
- For many businesses the Internet is the fundamental sales outlet; at least one company sells 90% of its high-end, expensive products through Internet and mail order sales.

Research methodologies

I developed a survey form (see Appendices for survey form) and during July, August, and early September, interviewed sixteen individuals from local, regional (New England, New York, and Pennsylvania), and national producers, wholesalers, and retailers (see interview and contact lists in Appendices). Their insights and knowledge contributed valuable perspectives on current and future markets, data on pricing and volume, as well as essential details about potential products.

Much of the research quantitative data comes directly from the Internet; in a few instances, I received proprietary information that helped broaden the database and shed light on retail operations. For both interviews and proprietary information, I guaranteed confidentiality to the individuals and companies. Therefore, in several cases, the data is not linked to its source and I did not include copies of the interviews. In my opinion, this does not diminish the value of the material; in fact, we might not have gathered some information without the confidentiality agreement.

Today's Internet resources are staggering! I located data from local, regional, and national producers, retailers, and third-party sellers (e.g., Amazon or ChefShop) through their respective online "shops." This information, reflecting market pricing in summer 2012, provides contemporary perspective on market strength and segmentation. In a few instances, I was able to interview an owner or key employee about Internet sales and data and learned that online offerings may be different than walking into a real store. In general, a customer sees greater selections in a physical store rather than online.

The study did not investigate fresh products like sausage, or smoked ham and bacon (many traditional bacons are cured, but the study did not examine them in depth). In defining dry-cured meats, I focused on a family of products made from pork and to a lesser degree beef, lamb, goat, venison, and other game that are air-cured over a period of weeks or months. These products are made from:

- Whole sections (e.g. speck, prosciutto, and traditional country ham)
- Whole muscle (e.g. coppa and lomo)
- Minced, cubed, or ground secondary cuts enclosed in natural or synthetic casings.

For traditional dry-cured meats, salt is the essential "curing" ingredient and generally is added directly to ground meat, often with other spices and ingredients, prior to stuffing the mixture into a casing. For whole sections or muscles, the salt and perhaps spices or herbs are rubbed into the surface or are placed for a short time in a brine solution; the salt will migrate slowly into the muscles. Appropriate amounts of salt (and sometimes sodium nitrite) and water with the correct pH level controls fermentation of the meat and mitigates growth of potentially dangerous pathogens (e.g. *C. botulinum*) during the aging process. All of these preparations – such as cased salami, hams, or single muscle like coppa – are aged in climate-controlled facilities (historically caves, cellars, attics or even chimneys) in which as they ferment and dry, slowly develop concentrated flavors, texture, and remain safe to eat (See Appendices for "A Primer on Salumeria." See also <http://www.woolypigs.com/aircuring.html>). A curing facility, similar to a cheese cave, nurtures a vast community of bacteria, molds, yeasts, and other micro-flora whose presence transforms each style into delicious, unique foods.

Conclusions

- **Current state of the market**

No easily accessible information exists to document the growth of new cured meat processors over the last decade; while data may be available through state and federal authorities, such an investigation went beyond the scope of the study. However, we can assess the overall growth and future potential through media attention, Internet presence, interviews, and other anecdotal information. **Based upon interviews and online resources, I can say with confidence the Vermont, regional (New England, New York, and Pennsylvania), and national markets for dry-cured meats are strong and growing.** A number of concurrent factors contribute to consumer demand and producer interest.

American attention, if not fascination, in all foods artisan has grown, together with an explosion nationally of small-scale farming and craft production in such diverse places as Brooklyn NY; Austin TX; Portland ME; and urban and rural points in between. Over the past decade, the production of a wide array of fermented foods and beverages from pickles to tofu to hard cider has taken center stage. These new businesses, often established by a cadre of young, energetic, innovative food professionals are changing the nature of food from farms to cities.

At the same time, we must acknowledge the many established businesses to survive the industrialization and standardization of American foods. For example, small companies like Benton's Smoky Mountain Country Hams and Broadbent have continued to make traditional bacon and country hams, while the rest of America ate the "other white meat." In places like Kentucky, Tennessee or Wisconsin (Milwaukee's Usinger's Sausage founded in 1880 is still in business!), these artisans are celebrated today for their amazing foods, often reflecting a part of American history captured in a dry-cured ham or sausage.

Since 2000, organized efforts like Slow Food and the locavore movement to meat CSAs (Community Supported Agriculture) and nose-to-tail dinners to the Internet and social media enabled new trends to find traction and visibility. **The growth of American craft beer, followed by artisan cheese, created a strong foundation for the emergence of a wide variety of new fermented foods over the past ten years.** As consumers looked for high quality, organic, local and definitely safer fresh dairy, fruits, meats, and vegetables, their demand fueled a need for more precise processing. **Witness the "butcher or cheesemaker as rock star" status and we begin to see the power of a changing marketplace and media attention.**

On the cured meat side, a number of restaurants, butcher shops, and specialty meat stores started their own in-house processing and introduced customers to new products, previously available only as imports or when traveling abroad. One consequence of greater interest in dry-cured products is how regulators, chefs, butchers, store owners, and restaurateurs are working to meet HACCP (Hazard Analysis Critical Control Points) and health requirements. For the nascent industry, especially for in-house processing, this is a vital and exciting step. **Of the sixteen interviewees, half are producing dry-cured meat in a FDA certified facility; in process to establish an approved building and HACCP protocols; or in planning stages.**

In addition, the interview group, while having different experience, knowledge, and perspective, expressed optimism for the future of dry-cured meat production. Considering most 19th and 20th century immigrants to the United States came from countries with long histories of preserving meat, most of the traditional dry-cured sausages, salami, hams, and other styles had long since disappeared in post – World War II America, replaced by high-volume industrial products. The interviewees reflect, therefore, the significant changes that occurred over the past ten to fifteen years. **From the national director of sales for Creminelli Fine Meats to owners of small curing operations to wholesalers and retailers of all sizes, they are enthusiastic about a renaissance of American artisan dry-cured meat products.**

For instance, over the past five years at Di Bruno Brothers in Philadelphia, the market shifted from an emphasis on imports to local domestic products. Today, of their deli meat sales, 75% is dry-cured meat and this number divides into 60% import; 40% domestic. According to Emilio Mignucci, this represents an important change for his business.

And yet, markets are not the same everywhere. Cities like Boston, New York or Philadelphia have such a large client base that even very high-priced items sell. In smaller markets, price may impact sales, even in those places where wealthy residents live. For example in Great Barrington, the owner of Rubiner's sees a maximum of \$80 – \$90 per pound retail for any dry-cured meat in his market, even though the Berkshires are a fashionable, more expensive region. Potential Vermont producers must make critical decisions about their markets, since higher-priced items have a narrower field in which to attract consumers.

Beyond the status of artisan cheese and a resurrection of small-scale dairies and creameries, artisan cheese businesses contributed to key shift in consumer attitudes about good food. For most of the second half of the 20th century, Americans were taught to reduce or eliminate fats in their diets; that fat was the source of all evil. While true in many ways, we lost sight of good-tasting foods in which good fats played important roles. In the 1960s and 1970s, the Baby Boom generation traveled to Europe and experienced new foods and beverages, including English and German beer and French and Italian wines, together with great bread, charcuterie, and cheese. In the 1980s, this generation helped drive consumer demand for the first wave of craft beer production and in the 1990s for artisan cheese. Cheese helped break through the barrier of an aversion to fat and over the past fifteen years, artisan cheese production has exploded to meet a continued demand for great tasting food. A lasting contribution of artisan cheese to dry-cured meat, as reflected by the interviews, is less consumer fear about fat and an appreciation and better understanding of production qualities and protocols to make great food.

To realize the potential of an emerging market for dry-cured meat, Vermont producers must achieve a critical benchmark to succeed: whatever they make, it must be distinctive and of consistent high quality! Over the past ten to fifteen years, Vermont cheesemakers confronted a similar challenge; as the marketplace grew more competitive, wholesalers, retailers, and consumers had hundreds of choices for cheese... if a product did not stand out from the crowd or was inconsistent from batch to batch, artisan cheese companies lost business.

One major metropolitan retailer is concerned about the level of competition in his city between producers of dry-cured meat. He said a very competitive market exists, especially for available

shelf space. Therefore, products must be absolutely top-notch to gain attention and shelf visibility. Along the East Coast, new companies are arriving at a steady pace and he mentioned Olympic Provisions from Portland Oregon and Charlito's Cocina from Long Island City NY.

The lesson for potential producers of Vermont dry-cured meats – aim for the best!

The national sales director for Creminelli commented that his company, together with La Quercia, Fra' Mani, Salumeria Batali, and others, **all buy the same pigs**, generally from ABC Meat Company, so the carcasses are somewhat standard in size, texture, and taste. Most nationally-known companies are small and annually produce five hundred thousand to one or two million pounds of cured meat. In order to meet the growing volume of business demand and the lack of resources – hogs – where they are located, they must buy where they can and then transport the carcasses long distances. The companies pay the same price; what differentiates each company, its products, and prices are the meat to fat ratios.

Given these national companies, among the best in the United States, buy the same meat to make different top-quality products is remarkable. Equally significant to me, the contemporary reality of buying pork means you go to where hogs are grown. If the pigs are of excellent quality, then the cured products are too.

With the reality of how national producers address supply issues, one question revolves around what does local mean in the cured meat marketplace? Consumers spend considerable money for top-quality national brands with most of them unaware the hog sources are the same. What does this mean to potential Vermont cured meat processors? In my opinion, in-state producers can source out-of-state meat to create great dry-cured items. On the other hand, they must recognize the risk of consumer reactions because a product is not 100% Vermont-raised and processed.

At the same time, more American farmers and ranchers are raising top-quality pigs to meet demand from processors. The “other white meat” is inferior at best to make excellent cured sausage, hams, and other items. Some of the national businesses now source heritage-breed hogs because the quality is so much better. For example, a year or two ago, Murray's worked with La Quercia and Iowa hog farmers to raise acorn and peanut-fed pigs to make limited edition dry-cured products like ones from Spain or Italy.

- **Possible Vermont products to consider**

Across the board, the wholesale, retail, and restaurant interviews highlighted the same positive statement: make a great Vermont dry-cured meat and I will buy it!

Vermont chefs, restaurant owners, retailers, and wholesalers said the following:

- At Healthy Living Market, the meat manager affirmed their interest in Vermont products; if quality and consistency are present, they will substitute them for out-of-state ones. They want to **partner** with a producer to make **private label** items for HLM.
- Another retailer is interested in just about anything from Vermont producers.
- Provisions International has waited several years for Vermont-made cured meats to appear. They have markets throughout the region that ask for Vermont items. If the products are top-quality, they can sell them.

- Stated interest in dry-cured meats include:
 - Prosciutto; lardo; French Saucisson Sec; Andouille
 - Traditional-style cured meats, especially German.
 - Dry-cured slicing ham; Tasso; German-style sausages; pancetta; Spanish-style chorizo; or new products, especially if from acorn, whey, or spent-grain fed animals. Wants to explore new tastes without losing sight of traditional origins.

The study's regional buyers and sellers of dry-cured meats consider Vermont their backyard, so local means regional to them. They want:

- Pancetta; bacon; salami; Vermont grown and cured prosciutto and coppa.

In general, in Vermont and the region, buyers are not looking for unusual types of dry-cured products at this time. More unique products like head cheese or violino di Capra (goat prosciutto) are probably better suited for restaurant menus or metropolitan markets. Right now, urban consumers have greater knowledge and sophistication about unusual types of cured meats, so any Vermont processors must take this reality into consideration. However, over time, Vermont and regional purveyors of dry-cured meats believe local consumers will buy more unusual products.

Several store and restaurant owners emphasized the critical value of staff education; whether the individual is the person behind the counter or wait-staff, they are the ones to educate consumers to help them understand products and prices, some of which are very expensive.

Tom Bivins, co-owner of Crop Bistro in Stowe, argues strongly to **engage Vermont chefs in product development and marketing. For some types of dry-cured meats, chefs are the best first step for a producer looking to sell new items.** As the former executive chef at New England Culinary Institute and former chair of the Vermont Fresh Network, he thinks the story behind the products – what breeds; best farming and processing practices; what they eat; pastured; humane grown and slaughtered can help tell a compelling story. In addition, chefs and restaurants are an important source for feedback to producers about product quality and consistency. With markets growing more competitive, such constructive criticism is essential to future success.

- **Product characteristics**

Nearly every respondent described positive characteristics for dry-cured meat in the same fashion:

- Local – perhaps the most important attribute.
- Pastured and whey-fed pork; pastured beef and other animals. Connections to Vermont's working landscape are important.
- Heritage breeds – can be significant, especially if a producer shows how a unique hog creates a distinctive product. In addition, as Tom Bivins points out above, the stories of some of these animals are very compelling.
- Antibiotic free – consumers are aware of the risk of drug-resistant pathogens and ask for antibiotic-free products. In addition, many large retailers have followed Whole Foods' lead and require suppliers to guarantee no antibiotic use.

- Nitrite-free – this tends to be less-important. The use of celery salt as a “natural” inhibitor does not eliminate nitrates or nitrites.
- Humane farmed and slaughtered – interviewees expressed a need for best practices approach. One individual will not buy animals fed on GMO-grains.
- Emilio Mignucci said “tell good stories about hogs, farms, and producers.” For example, Di Bruno’s consumers are very interested in local Pennsylvania farmers... and if product is good, it sells quickly.

Not as important to wholesalers, retailers, and restaurants:

- Organic – organic certification does not add much to sales and marketing for most dry-cured meat. In addition, the certification process and protocols are so expensive, few producers can afford organic. They do follow best practices from humane-raised and slaughtered to HACCP protocols and other retailer requirements. The one place where organic certification seems to be important is with producers like Applegate that conform to organic standards. Provisions International sells large quantities of Applegate products for the coop organic markets.
- A few companies said humane-farmed and slaughtered is not important and are neutral on nitrite or antibiotic-free (in addition, federal law prohibits any antibiotic residue in meat for human consumption).

Beyond these characteristics, everyone said – quality and distinctiveness sells. All of these attributes may be present, but if the product is inferior or inconsistent, it will not sell.

- **Market pricing and volume**

As the Internet created virtual global media outlets, visibility, and marketplaces for craft beer and artisan cheese, likewise contemporary cured meat devotees can locate traditional and new up-and-coming bacon and salami makers through computers and smartphones. After an article in *Saveur* magazine about Benton’s Smoky Mountain Country Hams in Tennessee, the company was so swamped with calls and Internet messages, it sometimes took months to fulfill orders just for bacon! **For many businesses, like Boccalone in Oakland and San Francisco, the Internet is the fundamental sales outlet; this company sells 90% of its high-end, expensive products through Internet and mail order sales.**

The data from producer and retail Internet sites shows retail prices range from approximately \$7 - \$9 per pound for low-end items to \$140 or more per pound for Spanish Iberico di Bellotta ham. Most retailers said they want to double the money they spend to buy a cured product. However, as you move up the price scale, margins tend to fluctuate to meet customer expectations. For example, one East Coast retailer buys Iberico for \$72 and sells for \$120 per pound. As the previously mentioned Rubiner’s example highlights, even in “high rent” areas, products must be priced to match market realities.

In major metropolitan areas, retailers must also satisfy high, middle, and low-end segments. At least one company has private label dry-cured products, some costing \$16/# wholesale to fulfill the lower end of the market. Several retailers commented their best selling items are Italian prosciutto, Spanish Iberico hams, and American prosciutto (e.g., La Quercia and Surryano); in

some stores they account for 50% of the cured meat sold over the course of a year. During the Thanksgiving, Christmas, New Year's holidays, one store moves 50 – 60 prosciuttos a week!

The data suggests although wholesalers and retailers still rely on imports, the emergence of American dry-cured meats is shifting the balance. Overall, companies generally reflect a 50 – 50 split between domestic and imports. While Di Bruno Brothers and Murray's Cheese in New York reflect this division, they see the growth in domestic sales reducing the percentage of imports. Di Bruno is purchasing Pennsylvania products – bacon; ham; prosciutto; coppa; lonza; and capicola – from Lancaster County farms. They see several new companies coming on-line, often with locally-sourced hogs.

Rubiner Cheesemongers in Great Barrington MA handles a wide variety of meats with a 75 – 25 domestic to import ratio that may reflect the store's well-established emphasis on sourcing local products. At Farmstead in Providence RI, they buy 50% import and 25% domestic. The remainder came from in-house; once the company's new facility is constructed and approved, the in-house percentage will increase dramatically. This may be a trend in the future for local businesses in smaller urban areas and rural communities.

The volume of dry-cured meat sold varies greatly and depends upon the outlet – most retail stores sell far more than restaurants. Beyond the type of business, a store or restaurant's location and the number of potential consumers impacts directly on sales. In 2011, both of the study's two metropolitan area businesses sold 50 – 100,000 pounds of cured meat; on average they move at least a **thousand pounds of dry-cured meat a week!** In addition, overall sales of cured meat products for these companies ranged from \$1 million - \$2 million. On the other side of the aisle, we have small retailers and restaurants whose modest sales range from **fifteen to thirty pounds a month** of cured products.

To answer the question about future potential volume, all interviewees said if great Vermont dry-cured meat is available they will buy it. To increase sales of Vermont products, they plan to move incrementally, because of a need to educate consumers and patrons. Only two individuals gave estimates of the amount of product they might buy. One metropolitan company might buy upwards of seven hundred pounds a week, while a local Vermont restaurant would double its purchases to sixty months a month. Another company said they could use a middle price range product line for Vermont and New England.

A few potential concerns

- The cost of raw material – hogs – may be a limiting factor. Over the next twelve to eighteen months, because the drought in the Corn Belt generates high commodity costs, the price of all types of hogs will go up. The heritage breeds, already in short supply, will also witness price increases as demand grows.
- We may need to identify, locate, or create a different name than “dry-cured meats.” It just does not have any consumer appeal.
- One businessman expressed concern about the move from fresh to cured meat for several reasons. One, why bother with dry-cured meat when fresh sausage is easier to make with less regulatory rules and a faster cash flow? Two, HACCP plans and facilities are expensive and we are just beginning to education state and federal inspectors.

- Nearly every interviewee said we must educate inspectors to help certify facilities and products. Producers need further help with HACCP plans and facility design.
- Several companies are Whole Foods-approved meat suppliers. Whole Foods established very strict meat protocols and requirements; if any Vermont producer wants to sell to them, they must conform to these regulations. In addition, Hunger Mountain Coop is moving toward meat standards articulated by the National Cooperative Business Association, who, in turn, used Whole Foods' protocols to develop its guidelines.
- Several Vermont retailers see price differentials when compared in-state to out-of-state; Residents may not be willing to pay high prices. Some in-state stores will often discount Vermont-made products to encourage consumers to buy.
- The two metropolitan retailers said the price to value/quality ratio is extremely important; products must be competitively priced!

APPENDICES

1. Interview survey form
2. Interview list
3. Contact list
4. Producer data
 - i. Top-quality national producers
 - ii. Middle segment producers
 - iii. Smaller production companies
5. Retail and wholesale data
 - i. East Coast wholesale
 - ii. East Coast retail
 - iii. Other retailers
6. Articles
 - i. Primer on Salumeria
 - ii. Charlito's Cocina
 - iii. Young artisans

Vermont Farm Viability Program

Dry-cured meat market study

July – September 2012

Survey questionnaire
Prepared by Jeff Roberts
cowcreek@attglobal.net

How would you characterize current market and prospects for future growth? Are you seeing increased consumer/customer demand? Where, if any, do you see barriers to Growth?

If available, what specific dry-cured products, including less common, nose-to-tail products, is your retail and/or wholesale market most interested in sourcing from **Vermont producers**?

- Examples might include such styles as: Italian soppressata; prosciutto; lonza; lardo; Polish kielbasa myśliwska; French Saucisson Sec; Andouille; rillettes; etc.
- Unusual types might include head cheese; violino di capra (goat prosciutto).

Are certain characteristics – organic; local; heritage breed; nitrate or antibiotic free; humane farmed and slaughtered – important to your marketing and sales of Vermont cured meat?

What are your retail and/or wholesale market willing to pay for these products (if produced in Vermont)? Is your market segmented into high; middle; and low-end?

What volume (in pounds) does your business currently purchase?

What volume might you consider purchasing? Monthly or quarterly?

Do you see a price differential between Vermont and other markets?

VHCB Cured Meat Marketing Study

July – September 2012

Interview list

1. Tom Bivins: chef/co-owner, Crop Bistro. Stowe VT. 802-253-4765. TomB@cropvt.com
2. Sean Buchanan: director of business development, Black River Produce. Springfield VT. 802-253-3582. buchanansean@hotmail.com
3. Pete Coleman: owner, Vermont Salumi. Plainfield VT. 802-454-8360
pete@vermontsalumi.com
4. Christopher Coutant: account executive, Provisions International. White River Junction VT. 802-291-6100. christopher@provisionsintl.com
5. Sam Cutting IV: owner, Dakin's Farm. Ferrisburg VT. 802-425-6721.
scutting@dakinfarm.com
6. Scott Frank: director of sales, Creminelli Fine Meats. Salt Lake City UT. 202-478-0434.
scott@creminelli.com
7. Aaron Foster: head buyer, Murray's Cheese. New York NY. 718-569-8426.
Aaron@murrayscheese.com
8. Matt Jennings: chef/owner, Farmstead. Providence RI. 401-274-7177.
matt@farmsteadinc.com
9. Briton Laslow, meat manager, and Dominic Barone, assistant meat manager: Healthy Living Market. South Burlington VT. 802- 863-2569, x310.
briton@healthylivingmarket.com
10. Robin Morris: owner, Mad River Food Hub. Waitsfield VT. 802-496-3100.
admin@madriverfoodhub.com
11. Beck Norman: meat buyer, Hunger Mountain Coop. Montpelier VT. 802- 223-8004, x204. beckn@hungermountain.com
12. Emilio Mignucci: co-owner, DiBruno Brothers. Philadelphia, PA. 215-922-2876.
emignucci@dibruno.com
13. David Miles: chef instructor, New England Culinary Institute. Montpelier VT. 802-828-8811. David.miles@neci.edu
14. Frank Pace: owner, Pace Catering & Catamount Hospitality. 802-233-8148.
chefpace@gmail.com

15. Kevin O'Donnell: vice president food and beverage, New England Culinary Institute. Montpelier VT. 802-225-3356. Kevin.odonnell@neci.edu
16. Matt Rubiner: owner, Rubiner's Cheesemongers and Grocers. Great Barrington MA. 413-528-0488. cheesemonger@verizon.net

VHCB Cured Meat Marketing Study
Contacts list: July – September 2012

1. Robin Morris: Mad River Food Hub
2. Pete Coleman: Vermont Salumi
3. Chris Bailey: Vermont Smoke & Cure
4. Beck Norman: Hunger Mountain Coop. Montpelier
5. Briton Laslow and Dominic Barone: Healthy Living Market. South Burlington
6. Frank Pace: Pace Catering & Catamount Hospitality
7. Sam Cutting: Dakin's Farm
8. City Market. Burlington
9. Brattleboro Coop
10. Hanover Coop
11. Sean Buchanan: Black River Produce
12. Christopher Wainhouse or Andrew Kannler: Provisions International. WRJ
13. Kevin O'Donnell and David Miles: New England Culinary Institute
14. Tom Bivins: Crop Bistro
15. David Hugo: Shelburne Farms
16. Matt Jennings: Farmstead
17. Dino Borri: Eataly. New York
18. Rob Kaufelt or Aaron Foster: Murray's Cheese. New York
19. Ihsan Gurdal: Formaggio's Kitchen. Cambridge
20. Matt Rubinger: Rubinger's Cheese. Great Barrington
21. Emilio Mignucci: DiBruno Brothers. Philadelphia
22. Ariane Daguin: D'Artagnan Foods New York

Top – quality national producers

Boccalone – Oakland and San Francisco

Off-shoot of Incanto restaurant in San Francisco. They use heritage breeds – Berkshire and Large Black hogs. Plant is in Oakland. They have a retail stand at the Ferry Plaza Market; however, 90% of their product is sold mail order. They sell some products wholesale. These are retail and mail order pricing (does not include shipping; generally 2-day air):

- Salami sampler (orange & wild fennel salame; soppressata; brown sugar and fennel & salame pepato): 24 – 32 oz. package of four: \$55
 - Ciauscolo (semi-soft salami with porcini); two 6 – 8 oz. chubs: \$28
 - Nduja (spicy, spreadable salami); two 6 – 8 oz. chubs: \$28
 - One finocchiona & one brown sugar fennel; two 6 – 8 oz. chubs: \$29
 - Salame Pepato & Soppressata; two 6 – 8 oz. chubs: \$29
 - Lardo Iberico de Bellota; one pound slab: \$36
 - Lonza, capocollo and piana sampler; one pound each: \$79
 - Capocollo (Berkshire pork); one pound: \$39
 - Lonza (pork loin); two pounds: \$69
 - Pancetta piana; two pounds: \$49
 - Lardo (6 oz.), rolled pancetta (8 oz.) & guanciale (8 oz.): \$44
 - Mortadella dogs; three 8 oz. packages: \$39
-

Creminelli – Salt Lake City UT. 2007

- Barolo and tartufo salami:
 - Murray's & Igourmet: 7 oz. @ \$18
 - Direct: 4 – 7 oz. chubs @ \$56
- Bresaola (Mocetta)
 - Igourmet: 3# @ \$80
 - Direct: 1.6# @ \$60
- Calabrese
 - Direct: 3# @ \$42
- Capicola
 - Direct: 1.8# @ \$30
- Casalingo
 - Igourmet: 5.5 oz. @ \$10
 - Direct: 4 – 5.5 oz. chubs @ \$36
- Coppa
 - Direct: 1.3# @ \$30
- Felino
 - Direct: 3 – 12 oz. @ \$39
- Finocchiona Salami
 - Igourmet: 5# @ \$100
 - Direct: 5# @ \$85
- Lardo
 - Direct: 3# @ \$58.50
- Milano
 - Direct: 4.5# @ \$65
- Piccante
 - Direct: 4 – 5.5 oz. chubs @ \$36
- Prosciutto cotto
 - Direct: 6# @ \$72
- Prosciutto
 - Igourmet: 10# @ \$180
 - Direct: 8# @ \$195
- Sopressa Italian
 - Direct: 5# @ \$85
- Soppressata
 - Direct: 4 – 7 oz. chubs @ \$49
- Varzi (Lombardia-style)
 - Igourmet: 2.5# @ \$45
 - Direct: 3# @ \$51
- Wild-boar salami:
 - Murray's & Igourmet: 7 oz. @ \$20 or \$18
 - Direct: 4 – 7 oz. chubs @ \$64

Fra' Mani – Berkeley CA. 2006

No direct sales

- Salametto
 - Igourmet: 12 oz. @ \$19
 - Amazon: 12 – 14 oz. @ \$20 (\$15 sale)
- Salametto piccante
 - Amazon: 6 – 9 oz. @ \$20 (\$15 sale)
- Salame Gentile
 - Chefshop: 2.4# @ \$55
- Salame Nostrano
 - Chefshop: 2# @ \$65
- Salame Toscano
 - 5.5# piece; diBruno: \$25/#
- Soppressata
 - 6# piece; Cheese Cave: \$30/#
- Pancetta
 - 1# @ \$17/#

Olli Salumeria – Manakin Sabot VA

They source all of their pork from small-scale producers in Iowa, New Jersey, and Virginia. Labels for the dry-cured sausage say: *“Pork raised: 100% vegetarian-fed; no antibiotics ever; no growth promotants”*

- Calabrese, Toscano, Napoli, Norcino and Molisana salumi
 - All sold in 24 oz. packages; 4 chubs @ 6 oz. each @ \$57
 - Murray’s Cheese: 6 oz. chub @ \$12
 - Igourmet: 6 oz. chub @ \$10
 - Williams-Sonoma: 4 chubs @ 6 oz. each @ \$50
 - Prosciutto:
 - Mangalista: Bone-in 10# @ \$400; de-boned 8# @ \$415
 - Barley-fed Berkshire: minimum 15# @ \$430
 - Organic Berkshire-cross: minimum 10# @ \$275
-

Fabriques Delices – Hayward, CA

- Merguez
 - Murray’s: 8 oz. @ \$16
 - Saucisson Sec
 - Murray’s: 12 oz. @ \$24
-

La Quercia – Norwalk IA

“Made from organic Berkshire cross pork raised with no antibiotics, no animal by-products, and no added hormones”

- Speck
 - Murray’s: 3 oz. @ \$11
 - Igourmet: 3 oz. @ \$9
 - Prosciutto Americano
 - Murray’s: 3 oz. @ \$10
 - Igourmet: 3 oz. @ \$9
 - Pancetta
 - Murray’s sells one piece for \$9.50 each (August 2012 ran a 2 for 1)
-

Milano’s Suino D’Oro (London Meat; New York NY)

Iowa-raised Duroc pigs

- Murray’s Cheese:
 - Soppressata: \$14/#
 - Guanciale: \$19/#
 - Lardo: 4 oz. @ \$8.99
 - Garden of Eden stores : all @ \$12/pound
- Lardo:
 - Igourmet: 1.25# @ \$25

Surry Farms (Edwards) – Surry VA

Our delectable Surryano Hams are all-natural, made only from pure-bred Six-Spotted Berkshire hogs. This rare breed is 100% pasture-raised to produce a perfectly marbled meat, with just the right amount of internal fat to produce a rich, distinctive flavor.

- Surryano Ham
 - Murray’s: 4 oz. @ \$15
 - Igourmet: 4 oz. @ \$13
 - Direct: 3 – 4 oz. pkgs @ \$34.95 (4 oz. @ \$11.67)
-

Aux Delices des Bois – Transatlantic Foods

Also Chestnut Valley Charcuterie @ Whole Foods

Certified Humanely Raised

No artificial nitrates or artificial additives, ever

Hormones and antibiotics never used

Pre-sliced, thick-cut

Lean meat means higher yield and shorter cooking

- Guanciale
 - Igourmet: 14 oz. @ \$20
 - Pancetta:
 - Igourmet: 8 oz. @ \$13
-

Salumeria Biellese – New York. 1925

No mail order

- Coppa
 - Murray's: 4 oz. @ \$10
- Bresaola
 - Murray's: 4 oz. @ \$14
- Cacciatorini
- Cacciatorini al Diavolo
- Capicolla
- Chorizo Secco
- Coppa
- Coppa Piccante
- Culatello
- Felino
- Finocchiona
- Finochietta
 - DeBragga: \$25/#
- Guanciale
- Jamon de Serrano
- Lomo
- Mangalista Guanciale
- Mangalitsa Lardo
- Mangalitsa Pancetta
- Mortadella
- Napolitana
- Nduja
- Pancetta
- Pancetta Pepato
- Pepperoni
- Petit Jesu
- Prosciutto Biellese
- Prosciutto Cotto
- Prosciutto di Parma
- Rosette de Lyon
- Salami Biellese
- Salame Con Porcini
- Sopressata
- Sopressata Piccante
- Sopressata Toscana
 - DeBragga: \$25/#
- Speck
- Zampon
 - DeBragga: \$25/

Middle market segment – Large national producers:

Busseto – Fresno CA

Vermont Smoke & Cure – Hinesburg VT

- Pepperoni
 - Murray's: @ \$8

Columbus Salumeria – San Francisco. 1917

Fed 100% vegetarian diets, never ever given antibiotics or growth hormones and raised to the highest standards in reduced-stress environments.

- Cacciatore:
 - Amazon: 2 – 3 oz. pieces @ \$13
- Calabrese Hot Salame
 - Amazon: 10 oz. @ \$8.80 (\$7 sale)
- Coppa Dry Mild or Hot
 - Amazon: 2# @ \$35 (\$29 sale)
- Crespone
 - Murray's: 10 oz. @ \$24
 - Amazon: 10 oz. @ \$16.60 (\$14 sale)
- Gift Pack Crespone and Cacciatore 1.4# each
 - Amazon: 3# @ \$40 (\$35 sale)
- Felino
 - Murray's: 6 oz. @ \$10
 - Amazon: 2.5# @ \$48 (\$37 sale)
- Finocchiona Mini
 - Murray's: \$22/#
 - Amazon: 10 oz. @ \$12.39
- Fiore
 - Amazon: 2# @ \$23 (\$18 sale)
- Italian Dry Salame
 - Amazon: 14 oz. @ \$10 (\$8 sale); 3# @ \$32 (\$27 sale)
 - Amazon: 12 case 8 oz. each @ \$67 (\$62 sale)
- Salame Secci String of 12 Salames
 - Amazon: 5# @ \$73.75 (\$58 sale)
- Salame Secchi Fiore 2 Pack
 - Amazon: 9 oz. @ \$13 (\$10 sale)
- Soppressata
 - Amazon: 10 oz. @ \$8.80 (\$7 sale)

Smaller production companies:

Caw Caw Creek. Columbia South Carolina

Traditional farming practices, including breeding. They raise Large Black; old-line Duroc; and Spotted Poland China; occasionally Ossabaw Island and Berkshire pigs.

Artisan Charcuterie

Bacon

Not lean or skinny like grocery store stuff! And that means it's delicious. Like all of our meat and animals, our bacon is free from all industrial perversions - salt, sugar, and smoke are the only ingredients. \$7.95/#

Country Prosciutto

Masterpieces of time and taste. Takes the pig about a year to grow, then we cure it for about another and offer it to you whole, foot-on, bone-in. Blending the techniques of country ham and prosciutto, we invite you to amaze your guests with this gorgeous and delicious delicacy. Whole, 12 – 22# each: \$200

Fatback

Cured and sliced . \$8/#

Fresh Jowls

For Guanciale. 5 – 10 # @ \$30

Oldani – St. Louis (1946)

- Filsette salame: \$12/1 – 1.5#
- Genova salame: \$38/4 – 6#
- Coppa hot or sweet: \$38/3 – 5#
- Salamini secchi: \$15/1#

Bolzano Artisan Meats – Milwaukee WI

All 4 links ~ ½# each

- Pig Red Salami (Red Wattle): \$53.25/2#
- Old School Salami: \$53.25/2#
- Fin Oh Kee Oh Na Salami: \$53.25/2#
- Pamplona Runner Spanish Style Chorizo: \$53.25/2#

Olympic Provisions – Portland OR

All 4.5 oz. @ \$10 each

- Cacciatore
- Chorizo Andalućía
- Chorizo Navarre
- Chorizo Rioja
- Finocchiona
- Soppressata
- Salami Nola
- Saucisson D'Alsace
- Saucisson Sec
- Salchichon
- Loukanika

Batali Salumi – Seattle WA

Mail-order catalog for home consumers

- Salami Duo: Size: approximately 2.2# @ \$33 – \$37/#
 - 1 Salumi Salame: ginger
 - 1 Finocchiona Salame

- Selected Salami: Size: 12"; 1.1-1.25# @ \$17/#
 - Hot Sopressata, Salumi Salami, Finocchiona
 - Da Vino (seasonal)
 - Smoked Paprika
 - Agrumi (supply limited): citrus and cardamom
 - Mole: chocolate, cinnamon, ancho, and chipotle peppers.
 - Oregano (September – November)
 - Winter (December – February): red & green peppercorns, garlic & milk solids
 - Dario (March – May): nutmeg and mace

Typical size is Medium (1.25 – 1.4# approximately 12" in length).

Smoked Paprika sold in pairs .5 – .75#/ pair.

- Selected Cured Meats (Sizes and pricing below)
 - Guanciale: 1 – 1.5# @ \$14/#
 - Culatello (inquire about wait list): 5 – 7# @ \$40/#
 - Pancetta: 2 – 4# @ \$15/#
 - Coppa: 1.5 – 2# @ \$18/#
 - Lomo: 2 – 4# @ \$19/#
 - Lamb prosciutto – de-boned: not violino di capra

Pine Street Market – Avondale Estates, GA

Pricing unavailable

Salami

- Picnic Salami – black pepper and fresh garlic
- Petit Paprika Salami – Hungarian salami flavored with paprika, chilies, and Pinot Grigio
- Petit Herb Salami – salami with Herbes de Provence (lavender, rosemary, & thyme)
- Valencia Salami – salami seasoned with orange zest and coriander
- Thuringer Salami – black pepper & ginger smoked over pecan wood
- Spanish Chorizo – smoked Spanish paprika, fresh garlic, and oregano
- Fennel Salami – Pinot Noir, toasted fennel, and black pepper.
- Soppressata Salami – white and black peppercorns, Pinot Grigio, and spices
- Saucisson Sec – French style with black pepper, garlic, and brandy.
- Avondale Salami – black pepper

Cured Meats

- Beechwood Smoked Speck
 - Bone-in Prosciutto
 - Boneless Prosciutto
 - Coppa
 - Pancetta
 - Guanciale
-

Salt & Time – Austin TX

Fresh Sausage (all \$12 unless noted; sizes unavailable):

- Sconnie Bratwurst
- Cherry Bratwurst
- Lamb Merguez
- Smoked Chicken & Leek
- Currywurst
- Jalapeno
- Italian
- Garlic & Wine \$10
- Mortadella Hot Dogs

Salumi (sizes unavailable)

- Bresaola \$5
- Lonzino \$7
- Coppa \$7
- Coffee Lomo \$7
- Pancetta \$5
- Genoa Salame \$5
- Soppressata \$6

Cooked & Smoked (sizes unavailable)

- Smoked Pork Chops \$8
- Cane Syrup Bacon \$8
- Lambdouille \$6
- Rillette \$6
- Ring Bologna \$15
- Tasso Ham \$5
- Pastrami \$5
- Lardo (regular or herb) \$5

Venetian – Ontario, Canada

- Pancetta
- Finocchiona
- Sopressa Fruilana
- Calbrese
- Abruzzo
- Cacciatori (Hunter's Sausage)
- Bavarian Meats
- Spicy or regular Landjaeger

	East Coast retailer					
Description	Unit	Price				
	Prices vary from 1.5 to 2 times wholesale					
Chorizo, Slicing	Per pound	16.99		Salami, Cc	Each	8.99
Prosciutto, Domestic	Per pound	13.99		Pick Hung	Per pound	18.99
Prosciutto, Tanara 24-mo	Per pound	29.99		Pick Hung	Each	11.99
Prosciutto, Tanara 30-mo	Per pound	32.99		Chorizo, P	Each	12.99
Speck Italian	Per pound	19.99		Field, Bee	Each	6.99
Chorizo, Palacios Hot	Each	8.99		Iberico de	Per pound	119.99

FOR THE ELECTRONIC VERSION – Double-click the left-hand corner to access the entire Excel spread-sheet.

FOR THE HARD-COPY VERSION, THE EXCEL SPREADSHEETS ARE FOUND AFTER THIS PAGE.

East Coast wholesaler/distributor: 2012 wholesale prices

Imported Hams & Air Dried Meats

Black Forest Ham-Dry Cured-Cold Smoked-Germany-3.5 lb.	LB 9.55	3.5 lb.
Madrangre Traditional Ham-French Style-16.5 lb.	EA 177.55	16.5 lb.
Parma Cotto Ham-Castagna-Boiled-Italy-14-16 lb.	LB 7.10	14-16 lb.
Herb Roasted Italian Ham-Leoncini-15 lb.	LB 8.00	15 lb.
Lomo-Dry Cured Pork Loin-Spain-11 oz.	LB 15.85	11 oz.
Pepper Ham-B/O-Ham I Am-9 lb.	LB 7.95	9 lb.
Rosemary Roasted Ham-Principe-Italy-2/6 lb.	LB 8.30	2/6 lb.
Smoked Petite Ham-Applewood Smoked-Heritage Breed-2.5-4 lb.	LB 8.60	2.5-4 lb.
Smoked Beechwood Ham-Principe-Italy-11 lb.	LB 8.30	11 lb.
Westphalian Rolled Ham-Dry Cured-Cold Smoked-Germany-2.5 lb.	LB 9.80	2.5 lb.
Jambon de Paris-French Style Ham-LTPC-11 lb.	LB 6.20	11 lb.
Jambon de Paris au Naturel-French Style Ham-Natural-LTPC-11 lb.	LB 6.55	11 lb.
Jambon de Paris Fumé-French Style Ham-Smoked-LTPC-8 lb.	.LB 6.20	8 lb.
Prosciutto Cotto-Bistro Ham-Salumeria Biellese-11 lb.	LB 9.50	11 lb.

Bresaola, Mortadella, Porchetta & Chorizo

Bresaola-Air Dried Beef-Bernina-Uruguay-3 lb.	LB 16.00	3 lb.
Chorizo-Pork-Nitrate Free-Spain-Hot-14/7.9 oz.	CS 78.15	14/7.9 oz.
Chorizo-Pork-Nitrate Free-Spain-Hot-7.9 oz.	EA 6.40	7.9 oz.
Chorizo-Pork-Nitrate Free-Spain-Mild-14/7.9 oz.	CS 78.15	14/7.9 oz.
Chorizo-Pork-Nitrate Free-Spain-Mild-7.9 oz.	EA 6.40	7.9 oz.
Chorizo-Pork-Nitrate Free-Spain-Minis-12/6.5 oz.	CS 68.60	12/6.5 oz.
Chorizo-Slicing Bat-Ravilla-Spain-3 lb.	LB 9.10	3 lb.
Mortadella w/Pistachios-Italy-14 lb.	LB 6.55	14 lb.
Porchetta w/ Rosemary-Sweet-Leoncini-15 lb.	LB 9.90	15 lb.

D'Artagnan

Cajun Tasso Ham (Pork Shoulder w/Pepper)-D'Artagnan-1.2 lb.	LB 7.20	1.2 lb.
Jambon de Bayonne-D'Artagnan-12/4 oz.	CS 64.00	12/4 oz.
Jambon de Bayonne-D'Artagnan-10-12 lb.	LB 10.60	10-12 lb.
Prosciutto-Wild Boar-Center Cut-D'Artagnan-1-1.5 lb.	LB 34.10	1-1.5 lb.
Sauçisson Sec (Dry Sausage)-D'Artagnan-8 oz.	LB 11.30	8 oz.
Sauçisson Sec (Dry Sausage)-D'Artagnan-2 lb.	LB 10.35	2 lb.
Smoked Mildly Hot Cajun Andouille-D'Artagnan-6/12 oz.	CS 27.35	6/12 oz.
Sauçisson a l'Ail-Garlic Sausage-D'Artagnan-6/1 lb. CASE ONLY	CS 46.00	6/1 lb.
Ventreche (French-Style Pancetta)-D'Artagnan-6/12 oz.	LB 8.90	6/12 oz.
Ventreche (French-Style Pancetta)-D'Artagnan-2.5 lb.	LB 8.35	2.5 lb.
Wild Boar Sauçisson-D'Artagnan-8 oz.	LB 15.35	8 oz.

La Quercia American Prosciutto and Pancetta

Prosciutto Americano-Organic-La Quercia-12 lb.	LB 18.50	12 lb.
Prosciutto Americano-Sliced-La Quercia-12/3 oz.	CS 65.00	12/3 oz.
Prosciutto Rossa-100% Heirloom Berkshire Pork-La Quercia-6.5 lb.	LB 16.55	6.5 lb.
Pancetta Americana-Flat-La Quercia-3.5 lb.	LB 11.75	3.5 lb.
Pancetta Americana-Rolled-La Quercia-3 lb.	LB 12.40	3 lb.
Pancetta Americano-La Quercia-Retail-12/3 oz.	CS 51.70	12/3 oz.
Prosciutto-Speck Americano-Sliced-La Quercia-12/3 oz.	CS 73.35	12/3 oz.

Prosciutto di Parma

Prosciutto-Slices-Whole Case-Parma-Volpi-Italy-	CS 71.20	12/3 oz.
Prosciutto-Boneless-Parma-Galloni-Red Label-Italy-18 lb.	LB 12.50	18 lb.
Prosciutto-Boneless-Parma-Galloni-Black Label-24 mo.-15 lb.	LB 15.35	15 lb.
Prosciutto-Boneless-Parma-Langhiranese-Italy-	LB 12.80	15 lb.
Prosciutto-Boneless-Parma-Pio Tosini-600 day-Italy-15 lb.	LB 13.15	15 lb.
Prosciutto-Boneless-San Danielle-14 Month-Italy-	LB 12.90	15 lb.

Prosciutto

Prosciutto-B/O w/Molasses-Salumeria Biellese-N.Y.-11 lb.	LB 12.80	11 lb.
Prosciutto-Speck-Smoked-Salumeria Biellese-N.Y.-1/2-5 lb.	LB 19.35	5 lb.
Prosciutto-Venison-Salumeria Biellese-N.Y.-1 lb.	LB 29.95	1 lb.
Prosciutto-Speck-Smoked-Italian-11 lb.	LB 10.80	11 lb.
Prosciutto-Duck-90 Day Cure-Hudson Valley-	LB 26.70	.50 lb.
Prosciutto-Duck-90 Day Cure-Canada-Sliced-2 oz.	EA 7.30	2 oz.

Serrano Ham

Jamon Serrano-Redondo Iglesias-Bone Out-Black Label-12 lb.	LB 13.30	12 lb.
Jamon Serrano-Redondo Iglesias-Bone-In-15 lb.	LB 10.60	15 lb.
Jamon Serrano-Sliced-Redondo Iglesias-20/3 oz.	CS 86.70	20/3 oz.
Jamon Serrano-Sliced-Redondo Iglesias-Half Case-10/3 oz.	CS 46.45	10/3 oz.
Jamon Serrano-Campofrio-Boneless-Aged 20 Months-12 lb.	LB 22.00	12 lb.
Jamonera-Ham Stand-Redondo Iglesias	EA 20.00	Each
Serrano Ham-Salumeria Biellese-12 lb.	LB 10.90	12 lb.
Serrano Ham-Nitrate Free-D'Artagnan-Boneless-Spain-11-14 lb.	LB 10.90	11-14 lb.

Dehesa Cordobesa Ibérico

Cabecero Ibérico-Cured Top Loin-700 gm.	LB 36.25	1.5 lb.
Lomito Ibérico-Cured Underloin-600 gm.	LB 36.25	1.2 lb.
Lomito Ibérico-Cured Underloin-300 gm.	LB 36.25	10.5 oz.
Lomo Ibérico-Cured Loin-1.2 kg.	LB 36.25	2.64 lb.
Lomo Ibérico-Cured Loin-600 gm.	LB 36.25	1.2 lb.

Fermin Ibérico and Serrano Hams

Jamon Ibérico de Bellota-Bone-In-Fermin-14 lb.	LB 39.80	14 lb.
Jamon Ibérico de Bellota-Boneless-Fermin-9 lb.	LB 67.95	9 lb.
Jamon Ibérico-Bone-In-Fermin-14 lb.	LB 23.60	14 lb.
Jamon Ibérico-Boneless-Fermin-9 lb.	LB 38.65	9 lb.
Jamon Serrano-Bone-In-Fermin-14 lb.	LB 9.85	14 lb.
Jamon Serrano-Boneless-Fermin-9 lb.	LB 16.20	9 lb.
Paleta Ibérico de Bellota-Bone-In-Fermin-11 lb.	LB 20.45	11 lb.
Paleta Ibérico de Bellota-Boneless-Fermin-4 lb.	LB 39.30	4 lb.
Paleta Ibérico-Bone-In-Fermin-11 lb.	LB 15.35	14 lb.
Paleta Ibérico-Boneless-Fermin-4 lb.	LB 29.00	4 lb.
Jamon Ibérico-Pre-Sliced-Fermin-20/2 oz.	CS 142.15	20/2 oz.
Paleta Serrano-Bone-In-Fermin-11 lb.	LB 7.70	11 lb.
Paleta Serrano-Boneless-Fermin-6 lb.	LB 12.60	6 lb.
Chorizo Ibérico Longaniza-Fermin-220 gm.	EA 7.00	7.8 oz.
Chorizo Ibérico Sarta-Fermin-350 gm.	EA 11.30	12.3 oz.
Chorizo Ibérico-Natural Casing-Fermin-1 kg.	LB 13.60	2.2 lb.
Chorizo Ibérico de Bellota-Natural Casing-Fermin	LB 18.80	2.2 lb.
Salchichon Ibérico Longaniza-Fermin-220 gm.	EA 7.00	7.8 oz.
Salchichon Ibérico-Natural Casing-Fermin-1 kg.	LB 13.60	2.2 lb.
Salchichon Ibérico de Bellota-Natural Case-Fermin	LB 18.80	2.2 lb.
Lomo Ibérico de Bellota-1/2 loin-Fermin-1 kg.	LB 40.70	2.2 lb.

Fra' Mani Handcrafted Salumi, Ham and Meats

Gentile-Artisan Salame-Fra'Mani-2 lb.	LB 15.60	2 lb.
Little Ham-Hand Trussed-Fra'Mani-3 lb.	LB 11.40	3 LB.
Mortadella-No Pistachios-Fra'Mani-6 lb.	LB 8.15	6 lb.
Nostrano-Artisan Salame-Fra'Mani-2.5 lb.	LB 17.35	2.5 lb.
Pancetta-Artisan Salame-Fra'Mani-3-4 lb.	LB 12.15	3-4 lb.
Salametto-Artisan Salame-Fra' Mani-12 oz.	LB 15.70	12 oz.
Salametto-Artisan Salame-Fra'Mani-12/12 oz.	LB 14.70	12/12 oz.
Salami Rosa-Cooked Salami w/Pistachio-6 lb.	LB 8.35	6 lb.
Sopressata-Artisan Salame-Fra'Mani-6 lb.	LB 17.35	6 lb.
Toscana-Artisan Salame-Fra'Mani-5 lb.	LB 17.35	5 lb.

Molinari of San Francisco

Calabrese Salame-Molinari-2 lb.	LB 10.30	2 lb.
Dry Coppa-Hot-Molinari-2 lb.	LB 10.45	2 lb.
Dry Coppa-Mild-Molinari-2 lb.	LB 11.05	2 lb.
Finocchiona-Fennel Salame-Molinari-4 lb.	LB 8.05	4 lb.
Finocchiona-Fennel Salami-Paper Wrapped-Molinari-13 oz.	LB 8.90	13 oz.
Hot Salame-Calabrese Style-Paper Wrapped-Molinari-13 oz.	LB 7.70	13 oz.
Hot Salame-Calabrese Style-Molinari-4 lb.	LB 7.40	4 lb.
Italian Dry Salame-Paper Wrapped-Molinari	LB 7.45	13 oz.

Italian Dry Salame-Large-Molinari-4 lb.	LB 7.25	4 lb.
Italian Dry Salame-Bats-Molinari-8 lb.	LB 8.65	8 lb.
Mortadella-Pork w/Pistachios-Oven Baked-Molinari-8 lb.	LB 6.00	8 lb.
Pancetta-Cured Italian Style Bacon-Molinari-5 lb.	LB 9.40	5 lb.
Pepperoni-Large-Slicing-3.5"-Molinari-3-4 lb.	LB 6.95	3-4 lb.
Pepperoni-Small-10" Molinari-10 oz.	LB 7.30	10 oz.
Pepperoni-Picolocini-Mini-Molinari-10/1.7 oz.	LB 8.45	10/1.7 oz.
Finocchiona-Picolocini-Mini-Molinari-10/1.7 oz.	LB 8.45	10/1.7 oz.
Rosette de Lyon-Molinari-2 lb.	LB 9.10	2 lb.
Salametti Secchi-Natural Casing-Molinari	LB 8.10	10/7 oz.
Salametti Calabrese Links-Natural Casing-Molinari-10/7 oz.	LB 8.45	10/7 oz.
Sopressata-Paper Wrapped-Molinari-13 oz.	LB 8.10	13 oz.
Sopressata-Large w/Burgundy Wine-Molinari	LB 8.55	4 lb.
Sopressata-Small Links w/Burgundy Wine-Molinari-10/7 oz.	LB 8.95	10/7 oz.
Three Way Loaf-Mortadella/Coppa/Salame Cotto.	LB 7.05	5 lb.
Toscana Style Dry Salame-Paper Wrapped-Molinari-13 oz.	LB 8.10	13 oz.
Toscana Style Dry Salame-Molinari-4 lb.	LB 8.20	4 lb.
Toscana Picante-Toscana Style Dry Salame-Molinari-4 lb.	LB 8.55	4 lb.

Salumeria Biellese of NYC Charcuterie

Bacon-Applewood Smoked-Slab-Skin On-Salumeria Biellese-9.5 lb.	LB 9.75	9.5 lb.
Brattwurst-Salumeria Biellese-50 lb. Only-Special Order**	LB 7.45	30 lb.
Bresaola-Salumeria Biellese-4 lb.	LB 29.90	4 lb.
Cacciatorini-Salumeria Biellese-5 lb.	LB 18.90	5 lb.
Cacciatorini-Salumeria Biellese-16 oz.	LB 18.90	16 oz.
Cacciatorini al Diavolo-Salumeria Biellese-5 lb.	LB 18.75	5 lb.
Wild Boar Cacciatorini-Salumeria Biellese-5 lb.	LB 26.55	5 lb.
Wild Boar Cacciatorini-Salumeria Biellese-16 oz.	LB 26.55	16 oz.
Capicola-Hot Only-Salumeria Biellese-2.25 lb.	LB 8.35	2.25 lb.
Coppa-Hot-Salumeria Biellese-2 lb.	LB 13.75	2 lb.
Coppa-Sweet-Salumeria Biellese-2 lb.	LB 13.75	2 lb.
Culatello-Prosciutto Heart Cured w/Juniper-Salumeria Biellese-3lb.	LB 15.80	3 lb.
Duck Rillettes-Salumeria Biellese-2.2 lb.	LB 22.70	2.2 lb.
Finochiono-Salumeria Biellese-9 lb.	LB 21.00	9 lb.
Finochietta-Salumeria Biellese-6/16 oz.	LB 15.40	6/16 oz.
Finochietta-Salumeria Biellese-16 oz.	LB 15.65	16 oz.
Guancia-Dry Cured Pork Jowl-Salumeria Biellese-5 lb.	LB 14.20	5 lb.
Lamb Prosciutto-Salumeria Biellese-16 oz.	LB 33.35	16 oz.
Lardo-Cured Fat Back-Mangalitsa-Salumeria Biellese-2 lb.	LB 12.90	2 lb.
Lomo-Salumeria Biellese-7-10 lb.	LB 30.15	7-10 lb.
Salame-Salumeria Biellese-4 lb.	LB 15.40	4 lb.
Mortadella-Salumeria Biellese-10 lb.-Whole only	LB 10.30	10 lb.
Napolitana-Salumeria Biellese-6/16 oz.	LB 15.40	6/16 oz.
Napolitana-Salumeria Biellese-16 oz.	LB 15.65	16 oz.

Pancetta-1/2 Bat-Salumeria Biellese-4 lb.	LB	14.50	4 lb.
Pancetta-Full Bat-Salumeria Biellese-8 lb.	LB	13.55	8 lb.
Pancetta Peppatto-Unrolled-Spiced-Salumeria Biellese-5 lb.	LB	14.20	5 lb.
Pepperoni-Salumeria Biellese-10 lb.	LB	7.35	10 lb.
Petit Jesu-Salumeria Biellese-8 lb.	LB	19.50	8 lb.
Rosette de Lyon-Salumeria Biellese-3 lb.	LB	15.40	3 lb.
Sauçisson Basquese-Red Wine, Garlic-Biellese-3 lb.	LB	15.40	3 lb.
Sopressata Picante-Salumeria Biellese-3 lb.	LB	15.40	3 lb.
Sopressata Sweet-Salumeria Biellese- 3 lb.	LB	15.40	3 lb.
Salame Toscano-Salumeria Biellese-16 oz.	LB	15.65	16 oz.

Vande Rose Farms of Iowa

Bacon-Artisan Dry Cured-Vande Rose-Iowa	CS	81.55	12/12 oz.
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Columbus & Daniele-Dry Cured Meats

Pancetta-Retail-Daniele-12/4 oz.	CS	38.05	12/4 oz.
Capocollo-Hot-Daniele-3 lb.	LB	9.45	3 lb.
Capocollo-Sweet-Daniele-3 lb.	LB	9.45	3 lb.
Capocollo-Sweet-Retail-Daniele-12/3 oz.	CS	41.05	12/3 oz.
Cacciatore-Artisan Collection-Columbus-4 lb.	LB	13.70	4 lb.
Calabrese Salame-Small-Columbus-10 oz.	EA	6.65	10 oz.
Crespone-Artisan Collection-Columbus-1 lb.	LB	13.55	1 lb.
Crespone-Artisan Collection-Columbus-12/1 lb.	LB	12.65	12/1 lb.
Felino-Artisan Collection-Columbus-2.5 lb.	LB	11.45	2.5 lb.
Finochiona-Columbus-7 lb.	LB	12.80	7 lb.
Genoa Salami-Columbus-5 lb.	LB	9.25	5 lb.
Italian Dry Salame-Columbus-3 lb.	LB	6.80	3 lb.
Rosette de Lyon-Columbus-3 lb.	LB	9.30	3 lb.
Sopressata-Sweet-Columbus-5 lb.	LB	7.95	5 lb.
Sopressata-Small-Columbus-10 oz.	EA	6.65	10 oz.
Toscano Salame-Small-Columbus-10 oz.	EA	6.65	10 oz.
Italian Dry Salame-(Rosette de Lyon)-Columbus-10 oz.	EA	6.65	10 oz.
Sauçisson-Black Pepper-Columbus-10 oz.	EA	6.65	10 oz.
Sauçisson-Herbes de Provence-Columbus-10 oz.	EA	6.65	10 oz.
Black Pepper Salame-Natural-Columbus-12/8 oz.	CS	82.05	12/8 oz.
Cajun Salame-Natural-Columbus-12/8 oz.	CS	82.05	12/8 oz.
Herb Salame-Natural-Columbus-12/8 oz.	CS	82.05	12/8 oz.
Italian Dry Salame-Natural-Columbus-12/8 oz.	CS	82.05	12/8 oz.

Busseto of California Dry Cured Salame

Pepper Loaf Salame-Busseto-3 lb.	LB	8.35	3 lb.
Rosette de Lyon-Busseto-2 lb.	LB	8.35	2 lb.
Sauçisson-Herbes de Provence-Busseto-2 lb.	LB	12.05	2 lb.
Sauçisson-Black Pepper-Busseto-15/8 oz. CASE ONLY	CS	71.05	15/8 oz.

Sauçisson-Green Pepper-Busseto-15/8 oz. CASE ONLY	CS	71.05	15/8 oz.
Sauçisson-Herbes de Provence-Busseto-15/8 oz. CASE ONLY	CS	71.05	15/8 oz.
Sauçisson-Rosette de Lyon-Busseto-15/8 oz. CASE ONLY	CS	71.05	15/8 oz.
Landjaeger-Usingers-3 lb.	LB	7.70	3 lb.

Daniele Dry Cured Salame

Salame w/Black Pepper Chub-Nitrate Free-Daniele-10 oz.	EA	7.50	10 oz.
Salame w/Herbs Chub-Nitrate Free-Daniele-10 oz.	EA	7.50	10 oz.
Salame w/White Wine Chub-Nitrate Free-Daniele-10 oz.	EA	7.50	10 oz.

Les Trois Petits Cochons of NYC

Chorizo-LTPC-8 oz.	EA	5.30	8 oz.
Sauçisson à l'Ail-LTPC-5/1.5 lb.	LB	6.20	5/1.5 lb.
Sauçisson Sec-LTPC-8 oz.	EA	5.30	8 oz.
Sauçisson Sec aux Cepes-LTPC-8 oz.	EA	5.30	8 oz.

Other Retailers

Salumeria Italiana – Boston

- Prosciutto
 - Gallino – Parma: \$22/#
 - Leoncini: Cotto: \$14/#
 - Cotto: \$14/#
 - Shanks: \$10/1.5#
 - Di Daniele: \$26/#
 - Senfter Speck: \$22/#
- Salumi
 - Calabrese-style soppressata: \$13/#
 - Columbus felino: \$18/#
 - Molinari finocchiona: \$12/#
 - Sliced: \$15/#
 - Hot soppressata: \$14/.75#
 - Oldani Genoa: \$12/#
 - Alps salsiccia secca dolce: \$12/.66#
 - Alps salsiccia secca picante: \$12/.66#
- Specialty cured meat
 - Bresaola (not Italy): \$22/#
 - Coppa di testa: \$12/#
 - Guanciale (not Italy): \$10/.5#
 - Hot or sweet capocollo: \$15/#
 - Mortadella: \$10/#
 - Pancetta: \$14/#
 - Porchetta: \$14/#

Articles

Salumeria: A Triumph of Gastronomical Proportions

A primer on Salumeria: the Italian term that refers to that vast, mouth-watering array of air-cured, preserved, and, in some cases, cooked meat. From prosciutto to mortadella, information on the dried meats (and their origins) that make an impact on Italy and your kitchen.

Italy's renowned cured, preserved and cooked meat

By Piergiorgio and Amy Nicoletti

One of Italy's favorite and most distinctive gastronomical inventions is salumeria—a term which refers to that vast, mouthwatering array of air-cured, preserved, and, in some cases, cooked preparations made (mostly) with pork meat: from prosciutto crudo to capocollo (capicola or coppa); from salsiccia fresca and secca (fresh and dry sausages) to various salami and sopressate (pressed salami from the south, most notably from Calabria) to cotechino (a delicious boiled sausage). After many years of living abroad, I have to admit that since returning to Italy, my desire for these succulent capolavori (masterpieces) appears insatiable. I just can't get enough of them—and I'm not alone in this passion. Each region of Italy—and sometimes even just a particular part of a region—has its own specialty, which is not only greatly appreciated locally, but is sometimes exported all over the world. Today salumeria is appreciated even in such unexpected countries as China, who now must be counted among the devoted fans of Italian salumi.

Basically, there are two categories of salumi in Italy: the first type is made using just one part of the pig, such as the leg for raw or cooked prosciutto, or the belly for pancetta; the second type is insaccati (that is “encased”), meaning the raw or cooked meat products are wrapped within a natural or synthetic outer skin. This latter category covers a vast array of pork products, such as sausages, salami, sopresse (sopressate), cotechini, mortadella and others. (It may be helpful to keep in mind that the word “salami” refers only to dried sausage; the Italian term “salume” covers all kinds of preserved meats.) Speck and bresaola (cured beef), for example, are very special kinds of salume from the northern Alpine region; they are extremely lean, and their taste is incomparable.

It is notable that there are 31 different “salumeria italiana” products that carry the most coveted European food labels: the D.O.P. (Denomination of Protected Origin) and I.G.P. (Indication of Geographical Protection). These labels ensure that strict standards of production are followed, and guarantee not only that the products are produced solely in specific geographical areas, but also that the animals are bred and raised only in designated regions. These guidelines are defined and regulated by European laws and monitored by different consortiums which ensure the methods of production for each single salume follow the traditions and regulations. The result is an impressive list of unique and traditional salumi with very different appearances and tastes; unfortunately, many of these products are only available in Italy. The United States Department of Agriculture has strict regulations about all imported fresh and cured pork meats. Happily, all

prosciutti crudi that are aged 400 days or longer, and all cooked salumi (such as mortadella, Cotechino Modena, and others) are allowed. In the list below, we've indicated those products that are available in the U.S. with an asterisk—but it should be noted that even some of these permissible items may not be easily found in the U.S.

The USDA only allows certain meats to be sold, determined by the number of days it has been air-cured, so many of these items are not available in the states (asterisk indicates available in USA).

Salumi with DOP label:

Prosciutto di Parma*
Prosciutto di San Daniele*
Prosciutto di Modena*
Prosciutto Veneto Berico-Euganeo*
Prosciutto di Carpegna*
Prosciutto Toscano*
Salame di Varzi
Salame Brianza
Salame Piacentino
Culatello di Zibello*
Jambon de Bosses (Val d'Aosta)*
Lard d'Arnad (Val d'Aosta)
Coppa Piacentina
Pancetta Piacentina
Sopressata di Calabria
Capocollo di Calabria
Salsiccia di Calabria
Pancetta di Calabria
Salamini Italiani alla Cacciatora
Sopressa Vicentina

Salumi with IGP label:

Bresaola della Valtellina
Ciauscolo
Cotechino Modena*
Lardo di Colonnata
Mortadella Bologna*
Prosciutto di Norcia*
Salame Cremona
Salame d'Oca di Mortara
Salame Sant'Angelo
Speck dell'Alto Adige*
Zampone Modena*

It is believed that some of the salumi listed above were being produced long before recorded history, as depicted in pictorial representations in frescoes and proven by archeological evidence.

From prehistoric times up until the early Middle Ages, pigs freely roamed the Italian countryside, particularly in the hills and wooded areas of the peninsula and the two large islands of Sicily and Sardinia. As these animals mingled among people in the countryside, they were very easy prey and the meat was extraordinarily succulent. The practice of using salt to preserve meat goes back thousands of years; the term “salumeria” derives from the Italian word for salt, or sale (pronounced SAH-lay)—and was developed alongside techniques for preserving fish and cheese making. Texts from Roman times indicate that the complex practice of preserving pork meat originated in the Mediterranean region and was already well established on the Italian peninsula. The dry, temperate weather and the richly varied geographic and climatic conditions of the Italian territories—together with the abundance of sea and mineral salt—all contributed to the development of the craft. Later, in Roman times, when legions of soldiers needed to be nourished, the techniques of salting and also air-curing pork meat became more refined. In the days of the early Roman empire, *pernas*—the latin term for “legs” (or prosciutti—and *lucaniche* (semi-dry sausages) were transported in large quantities, along with olive oil, wheat, wine, pecorino and dry figs. By the early Middle Ages, the practice of breeding hogs developed, and in the centuries to come, the accumulated experience, skills and wisdom for producing delicious salumeria were passed down through the generations and jealously protected within families.

It has been said that “tradition” can be defined as the sum of innovations that are collectively recognized as valuable. This is certainly true in the case of the development of the *arte della salumeria*. Besides the use of salt to preserve the best parts of the hog, like prosciutti, and air-curing techniques (for *lonzini*, for example, which is air-cured pork loin), smoking methods were added to the culinary repertoire for preserving meats. A combination of all three methods was also commonly used. As the famous Roman statesman and expert in agriculture Cato the Elder wrote in early Roman times, a technique for curing prosciutti (plural form) was used after initially salting the pork meat. After twelve days, the prosciutti were washed and all the salt eliminated. The legs were then left out in the arid wind for two days to dry. After that, a mixture of olive oil and vinegar was applied, completely covering the prosciutti before hanging it near a fireplace. According to Cato, using this method would ensure good and hygienic results. With some variations, this method continued to be used for centuries; of course, other methods were also explored. Spices—such as pepper, hot pepper, cumin, saffron, and cinnamon—and herbs such as sage, thyme, rosemary, parsley, coriander, and fennel, as well as garlic, were often added to salami and *salsicce* (sausages).

Eventually, in early Renaissance times, the most skillful, experienced and talented salumiere (producers of salumeria) formed guilds to protect and codify their discoveries and practices. The town of Norcia in Umbria, still famous today for its salumeria, gave the name to the trade: the *norcini*. In winter, the *norcini* would go from farm to farm, butchering the hogs and preparing prosciutti, *capocolli*, *lonzini*, salami, sausages, *pancetta arrotolata* (rolled, air-cured pork belly), and pork lard for the family. Later, when hog breeding developed and up until modern industrialization, *norcineria* was a revered trade—venerated traditions and secret recipes passed down from generation to generation within families.

With industrialization came the first refrigeration systems, which had a great impact on the *norcineria*, providing great improvements in the techniques and hygienic practices of the industry. In the last thirty years, another significant development occurred when pork meat

became much leaner due to changes in feeding and breeding methods. The centuries-old attachment that Italians have had for their traditional salumeria—and the great efforts made in safeguarding and improving upon traditions and recipes—has made it possible to develop and maintain an extraordinary level of quality and taste. Throughout Italy, it is possible to enjoy unique, unforgettable delicacies which are not only appreciated locally, but are successfully exported all over the world.

George E. DeLallo Co., Inc.
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This company opened in 2011 and is already grabbing attention and finding wholesale and retail success. The text is from the company's Website.

Charlito's Cocina. Long Island City. 2011

Charles Wekselbaum got into charcuterie at first because, he says, he was "fascinated by how a piece of meat—something so prone to spoilage—does the opposite of spoiling with proper control and salt." After making chorizo in his kitchen and realizing that he wanted to learn more than he could teach himself, Wekselbaum went to Spain to spend time with an older cousin. "He's a very, how do I say this, rustic kind of guy," Wekselbaum explains, "He makes his own olives, cures his own hams. We did the whole thing old school-style."

Back in the States and ready to start production for his new company, Charlito's Cocina, Wekselbaum started looking around for rental space. But owing to the USDA's extremely strict licensing guidelines for shelf-stable, non-heat treated, ready-to-eat meat products, he couldn't find anywhere in New York that was suitably certified and willing to take him on.

The solution was to work at an Italian butcher shop whose owners he already knew, who Wekselbaum says told him, here's a key and an apron, do whatever you want. The only drawback: they're in St. Louis.

While he readily admits that there are "geographical and logistical challenges" to being based several states away from his production space, Wekselbaum points out that his Iowa meat supplier is only five hours away, which saves time and money on shipping. "They're a coop of 25 Berkshire farmers, all raised on pasture," he says, "I couldn't find similar infrastructure on the East Coast without it being cost prohibitive," particularly since the nature of the process means that he loses 50% by weight of all the meat he cures.

So he goes to St. Louis once a month to package what he processed on his last trip and put up another batch, then brings everything to New York to distribute and sell at markets, including Smorgasburg. "We've been able to make a slightly unconventional situation work," he says.

He's currently producing three different cured products: the country sausage, which is made just with the pork and a "hand-harvested fleur de sel from Guatemala," Wekselbaum says, "which has

a complex flavor profile and a real personality of its own. It's two special ingredients with no other spices. It shows what really excellent fundamental ingredients can do when left to shine."

The trufa seca is the same salt and meat, but with the addition of black truffles from Italy. "No oil or essence," Wekselbaum promises, "Just the real thing." He says he gets the occasional comment that the sausage is "too truffly, but if you're going to make something with truffles, it should taste like truffles."

He developed his chorizo to "pay some sort of respect to the region in Spain that inspired it," he says, explaining that he decided on the combination of mild, rich paprika, garlic, and salt and meat because he finds "a lot of chorizos to be very busy. I wanted to do something minimalist while still being chorizo."

Charlito's also offers a vegan fig "salami," which is made with Black Mission figs, red wine (generally a Malbec), and Baker's bourbon. "It fits in well in our product line," Wekselbaum says, "It's shelf stable and gets better with time."

Trufa Seca – Dry Cured Black Truffle Sausage

Seasoned with black truffles and mineral rich sea salt, Trufa Seca is a striking example of how a few excellent ingredients can produce a world unto itself of complexity. Made with pasture raised, heritage breed pork.

Chorizo Seco – dry-cured chorizo

A version of an old time classic is made with heritage breed, pasture raised pork. It is seasoned with Mediterranean sea salt, mild paprika, and garlic.

Campo Seco – dry-cured country sausage

Made simply from pasture raised, heritage breed pork, and cured with a mineral rich, fleur de sel.

Distribution:

Arkansas

- Pinnacle Market – Rogers, AK (www.pinnaclestationlocalmarket.com/)

California

- Cheese Plus – San Francisco, CA – (www.cheeseplus.com)

Delaware

- Janssen's Supermarket – Greenville, DE (www.janssensmarket.com)

Georgia

- Gourmet Pantry – St. Simons Island, GA

Louisiana

- Cuban Liquor and Wine – Shreveport, LA

Michigan

- Symon's General Store – Petoskey, MI (www.lakeandhoward.com/)

Missouri

- The Wine Merchant – St. Louis, MO (<http://winemerchantltd.com/>)

Montana

- Olivelle – Bozeman, MT (<http://www.olivelle.com/>)

New Jersey

- Anthony David's Dining Room – Hoboken, NJ (<http://www.anthonydavids.com/>)

- Bin 14 Wine Bar – Hoboken, NJ (<http://bin14.com/>)

- Cafasso's Fairway Market – Ft. Lee, NJ (www.cafassofairwaymkt.com/)

- Garlic and Oil – Sparta, NJ (www.garlicandoilshop.com)

New York

- Alice's Arbor – Brooklyn, NY

- Beecher's New York – New York, NY (<http://beechershandmadecheese.com>)

- Casellula – New York, NY (<http://www.casellula.com/>)

- Dean and DeLuca – New York, NY (www.deananddeluca.com)

- DePanneur – Brooklyn, NY (<http://depanneurbklyn.com>)

- Dobbs & Bishop – Bronxville, NY (www.dobbsandbishop.com/)

- Eastern District - Brooklyn, NY (<http://www.easterndistrictny.com/>)

- Eataly – New York, NY (www.eatalyny.com)

- EAT – Brooklyn, NY (<http://eatgreenpoint.tumblr.com/>)

- Forager's City Grocer – Brooklyn, NY/ NY, NY (<http://www.foragerscitygrocer.com/>)

- Heritage Meat Shop – New York, NY (www.heritagemeatshop.com)

- Ideal Cheese – New York, NY (<http://www.idealcheese.com/>)

- Lucy's Whey – New York, NY (<http://chelseamarket.com/lucyswhey/>)

- Malt and Mold – New York, NY

- Marlow and Daughters – Brooklyn, NY (<http://marlowanddaughters.com/>)

- NY Mouth – (<http://www.newyorkmouth.com/>)

- Park Slope Coop – Brooklyn, NY (foodcoop.com/)

- Pata Negra – New York, NY (<http://www.patanegratapas.com/>)

- Terroir Tribeca – NY, NY (www.wineisterroir.com/)

- The Plaza Hotel Food Hall – NY, NY (<http://www.theplaza.com/dining/the-plaza-food-hall/>)

- Tuffet – Brooklyn, NY (tuffetnyc.com)

- Valley Shepard Park Slope – Brooklyn, NY (<http://valleyshepherd.com/>)

North Carolina

- Raleigh Wine Shop – Raleigh, NC (<http://www.theraleighwineshop.com/>)

Tennessee

- Lazzaroli Pasta – Nashville, TN (<http://www.lazzaroli.com/>)

Texas

- Central Market (Multiple Cities) (www.centralmarket.com)

Virginia

- Feast! – Charlottesville, VA (<http://www.feastvirginia.com/>)

- Red, White, and Bleu – Falls Church, VA (redwhiteandbleu.com/)

Washington, DC

- P & C Market (<http://stores.pandcmarket.com/StoreFront.bok>)

Young artisans dominate meat-ups

A demand for farm-raised organic fare sparks new independent charcuteries and other retail businesses.

By Maggie Overfelt

Crains New York

August 5, 2012 5:59 AM

On a recent Saturday at Smorgasburg, the waterfront food market that has become an epicenter of Brooklyn's artisanal food movement, Scott Bridi, 36, was demonstrating his creativity at \$5 a pop in front of a small crowd. His medium: a slider-size rye bun delicately stacked with spice-encrusted pastrami, which, as the founder of the five-employee, 2-year-old charcuterie firm Brooklyn Cured, Mr. Bridi prepared himself.

"The beauty is that we're taking raw material—the parts of the meat that aren't prime—and making it extremely desirable," he said, ticking off some of his other products: duck, rabbit and chicken garlic sausage.

While Brooklyn Cured was one of the few stalls trumpeting handmade sausages at Smorgasburg, roughly 60 of the 100 stands sold some variation of locally sourced meats. The entrepreneurs, most under 40 years old, represent a rising subset of New York City's well-known artisanal meat industry, which took off a few years ago when independent butcheries like Marlow & Daughters and Dickson's Farmstand Meats set up shop in Williamsburg and Chelsea, respectively.

Offering an alternative to prepackaged, commercially raised meat sold in supermarkets, these shops have "brought the interactive aspect back to chopping—the mental and emotional stimulation that comes from customers coming into the shop and getting customized orders of food that fits their lifestyle," said Charlie Mirisola, 27, a Dickson's employee who is helping to launch Gastrogladiators, a food-based social network aimed at competitive chefs, in the fall.

Mr. Mirisola is just one in a crowd of young entrepreneurs—former line cooks, waiters and even white-collar professionals—inspired by such shops to seek a lucrative niche tied to promoting locally raised organic meats, an estimated \$538 million industry in the U.S., according to the Organic Trade Association.

Eric Demby, co-founder of Smorgasburg, said he had to trim the list of meat-centric vendors who wanted a presence at this year's market. "We were too meat-heavy last year," he explained.

'Perfect storm' for selling

New York, like the San Francisco Bay Area and Portland, Ore., offers the "perfect storm" needed for small businesses selling organic meat to thrive, according to Marissa Guggiana, co-founder of the Butcher's Guild, a year-old professional organization for artisanal butchers.

"Certainly some of the most outspoken and known butchers of this movement are in New York, where there's a large population of educated consumers near an agricultural area," Ms. Guggiana said.

Of course, breaking even can be tough, especially when carefully sourcing meat to fulfill the exacting requirements of health-conscious customers. "It's hard to make a living," she said, "especially for the people who own their own shops—they are working on much smaller margins."

Lots of customers

But those challenges are not deterring young, energetic meat purveyors. Brooklyn Cured, which Mr. Bridi started after working with charcuterie at Gramercy Tavern and Marlow & Daughters, has found plenty of customers willing to pay a premium for its small-batch products. The company is profitable, and Mr. Bridi expects 2012 sales to be double last year's roughly \$150,000.

The company, which buys its meats directly from small farms in New Jersey, the Hudson Valley and Pennsylvania and from distributors of locally raised meat, has little overhead. Instead of running its own shop, Brooklyn Cured sells retail at five outdoor food markets and wholesale to gourmet food shops.

The face-to-face interactions with customers help Mr. Bridi tell the story of his foods and learn his customers' tastes, which in turn inspires new products and fuels business growth. "The core of what we're doing is making connections through awesome food," he said.

Read more:

<http://www.crainsnewyork.com/article/20120805/SMALLBIZ/308059979#ixzz22uREVZa3>