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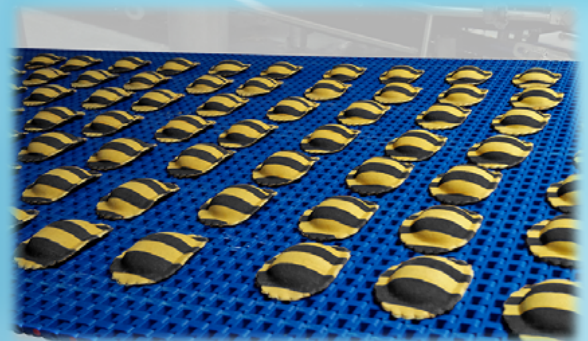
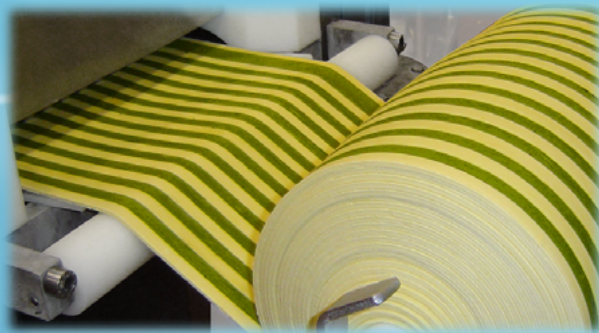
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1



Proceedings of the Pastaria Festival. Raw materials for dried pasta and methods for evaluating technological quality

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The study was presented during the conference entitled *Dry pasta: what's cooking?* organised as part of the 2017 edition of Pastaria Festival.

Dried pasta is, by a wide margin, the most popular product produced from durum wheat in the world. The versatility of preparation of this food product, its ease of cooking and preservation, availability in a wide range of shapes and sizes, as well as its low impact on blood sugar levels justify its success, including on an international level.

The structural characteristics of cooked pasta are generally described as being a compact matrix, with the starch granules entrapped in the protein net formed by the gluten. This structure is influenced by both the properties of the raw materials and the conditions of the technological process, and is responsible for the specific nutritional and sensory properties of the pasta. In terms of the sensory characteristics, how it reacts to being cooked – good “bite” and low stickiness – is considered to be the most important indicator of the quality of the pasta and has an increasing influence on consumer buying choices. The phenomena attributable to starch and protein resulting from cooking (gelatinization and denaturation) are in conflict with each other as regards the final pasta structure. When the formation of a coagulated – and therefore non-deformable – protein net prevails, although gelatinized, starch will remain trapped within the net. As a result, the pasta will have consistency and not be sticky. Conversely, in the event the proteins are not sufficiently strong and quick to coagulate, the starch could swell and gelatinize without resistance or its expansion being hindered. Under these conditions, the amylose tends to seep out of the starch granules into the cooking water, while the amylopectin rises towards the surface of the pasta, creating a high level of stickiness and lack of consistency in the cooked pasta.

It follows that the raw material plays a key role in determining the quality of cooked dry pasta. Specifically, pasta produced from durum wheat is characterized by sensory properties and reaction to cooking that are very different and superior to those of pasta made of soft wheat. It is no accident that in Italy, France and Greece, dried pasta for the domestic market must be produced exclusively from durum wheat semolina.

The superiority of durum wheat over soft wheat is not a question of protein and gluten content (the difference between the two species is not that dra-



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Table 1 ITALIAN VOLUNTARY CLASSIFICATION (UNI 10709:2001)

Type and denomination	Proteins (% DM)	Dry gluten (% DM)	Gluten Index	W (10 ⁻⁴ J)	P/L
“Class A” semolina	> 13.5	≥ 12.0	> 80	> 250	2.0-2.5
“Class B” semolina	12.0-13.5	10.5-12.0	60-80	180-250	1.0-2.0
“Class C” semolina	10.5-12.0	9.0-10.5	30-60	100-180	0.5-1.0

matic), but the ability of gluten to form a strong network capable of resisting the thermal and mechanical stress that occurs during key phases of the production process, specifically during extrusion. In fact, in the case of low-quality flours, the extrusion phase can cause weakening and breakage of the gluten network, with further worsening during cooking. Not accidentally, alongside legislated parameters (protein: min. 10.5% DM; ash: max. 0.90% DM; moisture: max. 14.5%), ascertaining semolina quality also includes voluntary regulations contained in many company specifications. In this regard, UNI 10709:2001 (Italian Organization for Standardization) takes into consideration numerous physical and chemical parameters of durum wheat and semolina, including a number of technological parameters that can foresee how a flour will behave during the production process and, therefore, make it possible to

define three main quality classes for semolina ([Table 1](#)).

Hard wheat semolinas are generally classified on the basis of protein level and gluten quality. In fact, high protein content and the presence of “strong” gluten in terms of its viscosity/elasticity properties are indispensable for transforming hard wheat semolina into pasta capable of guaranteeing excellent characteristics when cooked. Raw material conformity to these characteristics is generally verified – in addition to the content level to total proteins – by findings of numerous imitative rheological tests (such as those performed using Alveograph[®], Glutomatic[®], Glutograph[®], etc.) that numerous studies have shown are correlated not only to the viscoelastic characteristics of the gluten, but also the quality of the cooked pasta.

Over the decades, various methods of rheological characterization of wheat flours

The essential in three ingredients



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have been proposed with the goal of predicting their behaviour during the production process and satisfying the requirements of all players along the wheat supply chain. Specifically, those involved with genetic selection need to be able to analyse in a short amount of time a very high number of lines, for which the amount of material represents a constraint. The milling sector requires fast, reliable methods to control wheat quality during the reception process. And finally, the dried pasta sector requires quick, reliable methods to

predict the quality of the end product. Starting in the 1930s, numerous rheological tests were developed whose goal was to conduct analysis using special instruments to simulate the behaviour of proteins and starch and their interaction when subjected to physical stress that simulates what occurs during the dried pasta production process. [Table 2](#) provides the operating principle behind the most-utilised rheological tests, together with the duration of the test and the size of the sample required for analysis.

Table 2 RHEOLOGICAL APPROACHES CURRENTLY UTILISED TO PROFILE HARD WHEAT FLOURS

Test	Measurement	Analysis time	Sample size
Alveograph®	Resistance of dough subjected to gas pressure	50-60 min	250 g
Gluten Index®	Capacity of gluten to pass through a sieve following centrifugation	10 min	10 g
Glutograph®	Resistance of gluten subjected to torsion	< 60 s	< 15 g
Mixolab®	Resistance of the dough to mechanical and thermal stress	50-60 min	50 g
GlutoPeak®	Resistance of the flour to intense mechanical stress	5-10 min	< 10 g

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seeds and cultivate them in Italy, adopting and improving farming techniques adapted to the Mediterranean climate, thus keeping the organoleptic features intact. Kronos is a durum wheat with a unique protein content, resistance to cooking, taste and color, ideal for tasty and always al dente pasta.

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The Alveograph® (Chopin, France) is unquestionably the test most-utilised to assess the technological quality of wheat flours used in pasta-making. The test involves the preparation of a dough at controlled humidity (approx. 43%) which is extruded, pressed and, following a rest period, is injected with air until the bubble which is formed bursts. The parameters supplied by this test are:

- P = Maximum height of the curve, expressed in mm. This parameter is closely tied to the resistance of the dough to deformation and quantifies its “tenacity”;
- L = Length of the base of the curve measured in mm. The extensibility of the dough;
- P/L = Balance between tenacity and extensibility;
- W = Area within the curve expressed joules. This index provides an overall assessment of the semolina and corresponds to the energy developed by the dough prior to total deformation.

Generally, good-quality semolina for pasta-making has a high level of tenacity and strength. The “Gluten Index” test assesses the quality of the gluten subject to extraction from the flour through washing with a saline solution using the Glutomatic® system (Perten, Sweden). The extracted gluten is transferred to a special container with a sieve and centrifuged. The

portion that passes through the sieve is collected with a spatula and weighed; the portion that remains is gathered and added to the weighed amount. The total weight corresponds to the wet gluten. The result can be expressed either as a percentage of wet gluten or dry gluten if it is subsequently dried. The amount of gluten that remains in the centrifuge sieve in relation to the total weight of the wet gluten corresponds to the Gluten Index. Generally, semolinas with a high Gluten Index are preferable for obtaining a good-quality product.

The Glutograph® (Brabender, Germany) is a tool that registers the gluten resistance time – subject to extraction using the Glutomatic® (Perten, Sweden) – under torsion. This instrument is comprised of two round, corrugated, parallel plates positioned in opposite directions inside the instrument. The extracted gluten is positioned between the two plates. While the top plate remains immobile, the lower one rotates at a constant force. Depending on the quality of the gluten, this constant force (shear stress) causes deformation of the sample to a greater or lesser degree. As a result, the lower plate is deflected more or less rapidly compared with the upper plate. This deflection (shear angle) is recorded as a function of time. Once the preset deflection has been attained, the sample is re-

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leased and its elasticity is recorded. Strong gluten has low “stretching” and relaxation values compared with weak gluten. Although the parameters obtained from the tests mentioned above correlate well with the behaviour of pasta during cooking, they do have some limitations. For example, the moisture level of the dough produced during the alveographic test (around 43%) is higher than that of dough during a real production process (approx. 30-33%). In addition, the approaches involving assessment of extracted gluten are often open to criticism because isolating a particular component could result in alterations and modifications of the actual interaction among the different (macro) molecules in the “native” system. As a result, identifying rheological tests capable of re-

producing process conditions in terms of the level of hydration, physical-mechanical stress and times and temperatures in a real extrusion process is of fundamental importance to improving the current system of profiling raw materials and categorizing them into quality classes. In this regard, some new equipment, such as the Mixolab[®] recently proposed by Chopin or Brabender’s GlutoPeak[®], could provide useful information because they are better able to simulate the stresses in a real pasta-making process.

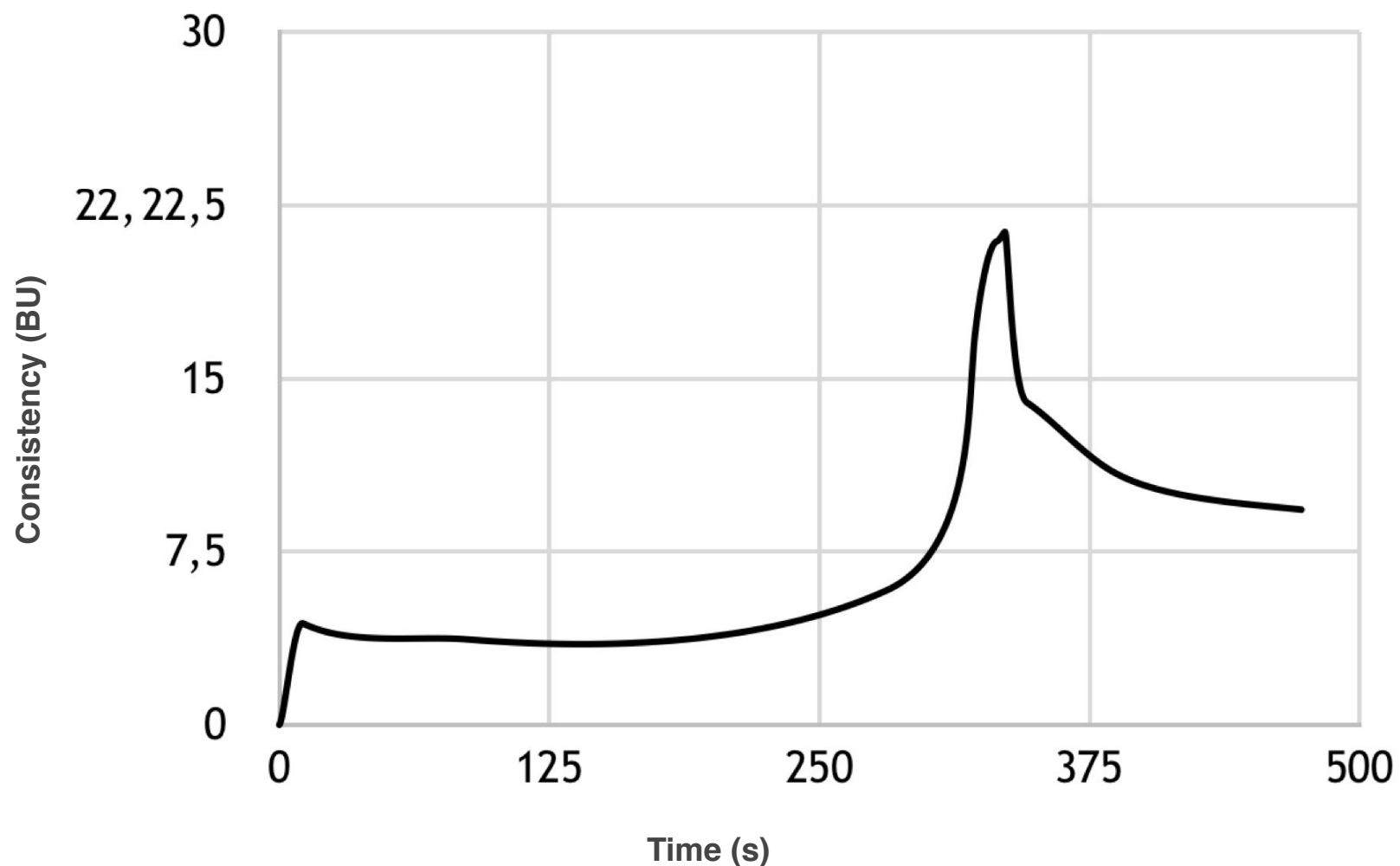
The Mixolab[®] (Chopin, France) provides information about both the rheological behaviour of the protein component as well as the gelatinization and retrogradation profile of the starch component. This makes it possible to obtain useful information about

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Figure 1 SAMPLE GLUTOPEAK® CURVE



the properties of both the proteins and starch. In fact, even if starch represents more than 60% of the dry matter in durum wheat, until now, this component has been an “inert” part given that it was treated passively within the gluten network or even as the component responsible for the appearance of stickiness during cooking. The testing method consists of mixing the flour with water until the optimal consistency is obtained. The dough consistency is measured as the resistance (expressed in nm) of the dough during the kneading phase at a constant speed. In addition to the “water absorption” parameter of the sample, the test can provide information about dough

behaviour during the kneading phase, the strength of the gluten network, amylase activity and starch gelatinization and retrogradation.

The GlutoPeak® (Brabender, Germany) has recently been offered to forecast and assess wheat quality by measuring gluten aggregation properties. Compared with conventional tests ([Table 2](#)), the analysis performed by GlutoPeak® offers a number of advantages in terms of the amount of sample required (<10 grams), analysis time (<5 minutes), ease of use and operator impact (very low). The test involves subjecting the flour/water mixture to intense mechanical action from the speed of the rotating pad-



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dle, up to 3000 revs/min. This provides the curve seen in [Figure 1](#).

As the gluten forms, there is an increase in consistency (expressed in Brabender Units, BU), up to a torque that corresponds to maximum gluten aggregation. Following this point, consistency decreases following the rupture of the gluten network due to the intense mechanical action.

The primary parameters included in the GlutoPeak[®] curve are: maximum consistency (BEM) which is the torque formed as a result of gluten aggregation; time for the torque to form (PMT) which is the maximum viscosity; and the aggregation energy which is the area subject to torque. On the basis of initial observations, this test would seem to make it possible to distinguish semolinas with good pasta-making performance from those of medium-low quality. Generally, good-quality semolinas have high energy values which are often the result of prolonged gluten aggregation times and/or high consistency. Nonetheless, there are currently few scientific studies regarding the use of this rheological test for evaluating the pasta-making quality of durum wheat semolinas. Scientific studies – with the support of companies in the sector – should aim at validating this test through a large number of samples to evaluate the potential effect of semolina

particle size on the aggregation properties of the gluten proteins.

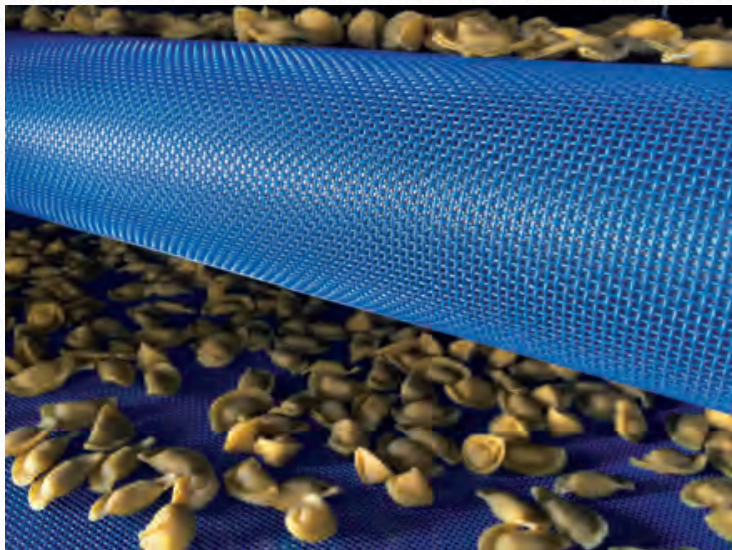
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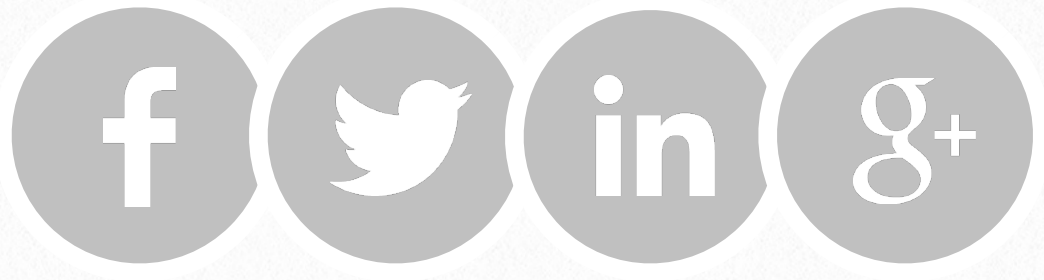
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For the first time the President of the Argentine pasta sector is not a businessman



With the appointment of Juan Airolde, former Institutional Affairs Manager, as President of the UIFRA, a new period begins. Below, we will get to know him and the challenges he face at his 33.

Since last November 9, the UIFRA (*Unión Industrial de Fideeros de la República Argentina*) has a new President. Juan Manuel Airolde will be the first professional who is not a businessman to hold this position, which was only reserved for the owners of pasta factories in Argentina.

Juan Airolde holds an undergraduate degree in Communication from the University of Lomas de Zamora. He started working part-time at the UIFRA in 2012 and, little by little, he began taking more responsibilities as the assistant of the executive board.

Before starting his activity at the UIFRA, this young man worked within the Argentine Catholic Church, in the area of Social Work of the Episcopal Conference when His Eminence Cardinal Jorge Bergoglio was its President.

Within the pasta sector, the only link he previously had was a period of three years working as commercial representative in a small laminated-pasta factory located in south metropolitan Buenos Aires.

In 2014, already working for the UIFRA, he took the responsibility of completely organizing the World Pasta Day in Buenos Aires. Even though the success of such event gave him official recognition at a local level, he was not able to achieve the strengthening of the UIFRA's role among the international partners.

Argentine business context

The Argentine pasta sector is going through a continuous crisis due to over-supply and lack of profitability. A lot of pasta manufacturers have closed their factories during the last years, and the risk still remains for many others.

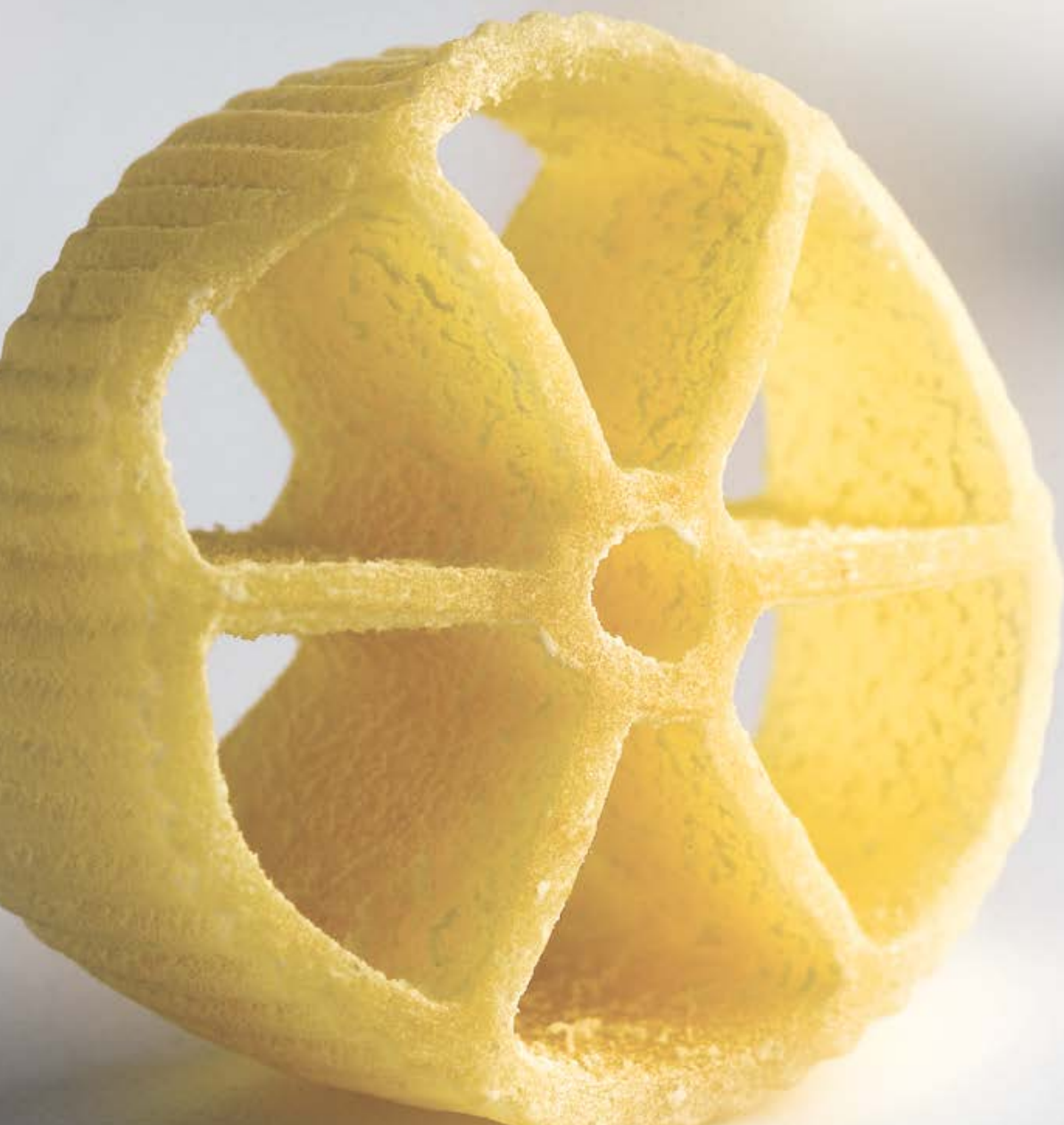
As regards opportunities, it is also true that the Government of President Mauricio Macri has placed the sector within the group that he considers to have a priority. “We do not need to export wheat, but pasta”, he frequently says.

In this sense, the UIFRA, together with the government officers, shall have the responsibility to revert the huge bureaucracy and overpricing labyrinth that local businessmen face when exporting. In this country, the floods of taxes accumulating at each stage turn the products with an added value less competitive. This is partly a consequence of having maintained, for decades, a closed economy with a growing public expenditure and high levels of unreliability.

In the current setting, however, all the economic actors of this country are looking to shape up towards a greater openness and global integration. The Argentine “pasta makers”, not used to this, shall have to prepare themselves to compete.

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THE GLOBAL MARKETPLACE FOR PASTA



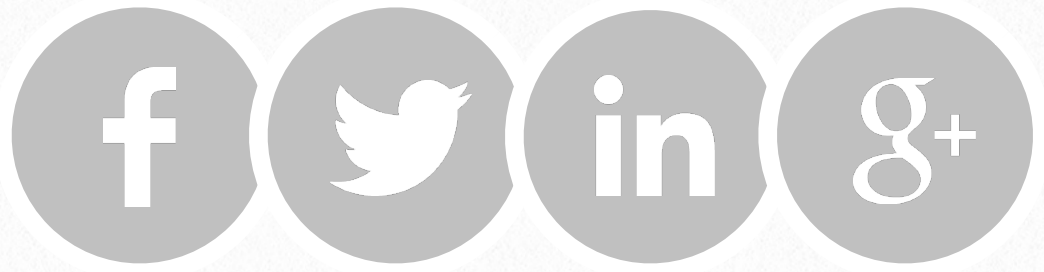
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3



Proceedings of the Pastaria Festival.

Juri Piceni
Gluten Free Expo

Gluten-free pasta, a sector in continuous quantitative and qualitative evolution



A summary of the contribution dedicated to gluten-free pasta, as part of the conference entitled *With and without gluten: global prospects and trends in pasta consumption in “away from home” and retail sales channels* which took place as part of the first edition of Pastaria Festival.



[Download the slide](#)

Gluten Free Expo, the international trade fair dedicated to gluten-free products, every year organises an observatory on the gluten-free market and its dynamics.

In recent years a sector that has been growing strongly has been that of gluten-free pasta, be it dry, fresh and filled. In recent years this sector has witnessed the emergence of either new, exclusively gluten-free pasta manufacturers or established companies, from the traditional sector, that have added gluten-free pasta to their conventional product range.

A closer, more detailed look shows that of the sample number of companies interviewed, 49.5% produce only gluten-free pasta, whereas 50.5% produce both traditional and gluten-free.

Of these, 21.3% operate in the pasta sector with one or more products, be it fresh, dried or filled pasta.

Last year the gluten-free market recorded significant sales trends with +20.60% sales by value, whereas sales by volume stood at + 19.3%. The increase in shelf products is 19.5%.

The pasta sector, in particular, accounts for almost 14% of the entire turnover in gluten free products.

Over the latter period in Italy, the positive performance of this market, in addition to an increase in the number of people purchasing gluten-free products by necessity, is also due to factors associated with new consumer life styles. When it comes to choosing a product, 34% of consumers look for products that help them live a healthy lifestyle, whereas 23% are looking for products with natural ingredients. These new dietary habits are a direct consequence of the success of the new alternative pulse and cereal-based pasta products.

In more specific detail, over the last year the gluten-free pasta sector recorded a 15.3% rise in sales by volume (or 6,360,581 kg of pasta), whereas the increase in sales by value was around 16.6%, or approximately € 30,772,954.



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GLUTEN-FREE FOODS: COMPANIES OPERATING IN THE PASTA SECTOR

21.3 %
OF THE
COMPANIES
HAVE DRY OR
FRESH PASTA
PRODUCTS



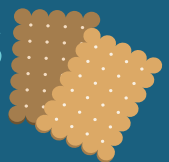
6.3% FLOURS



**15.0% BREAD
AND
SUBSTITUTES**



**28.3% PASTRIES
AND BAKED
PRODUCTS**



**7.9% FROZEN
PRODUCTS**



source: Osservatorio Gluten Free Expo - GRS

The share of sales by volume of gluten-free pasta across Italy can be broken down as follows: 36% in the north-west, 25.7% in central Italy and Sardinia, 22.6% in the north-east and 15.7% in the south. In terms of the ingredients, the gluten-free pasta sector is increasingly revealing the use of alternative raw materials such as pulses and cereals. Corn is still a very much used basic ingredient, whereas the use of rice as a main ingredient is no longer as widespread. The growth of this market also marks an evolution in sales channels that includes

the appearance of gluten-free pasta on the shelves, of not just specialist retailers (9.9%), but increasingly on those of supermarkets (70.5%) and hypermarkets (19.6%).

It should be noted that the phenomenon of gluten-free products is now involving the major retail outlets, not just in the pasta sector but in all products as well.

Furthermore, it is important to highlight that almost 13% of widely consumed packaged products now display the “gluten-free claim” on its labelling.

The interest of the major retail outlets’ in



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GLUTEN-FREE FOODS SALES TRENDS



SALES BY
VALUE
+20.6 %



SALES BY
VOLUME
+19.3 %



NUMBER OF
REFERENCES
+19.5 %

DECEMBER 2016 FIGURES COMPARED TO 2015

source: Iri

gluten-free pasta is growing increasingly, so much so that the share related to gluten-free branded pasta is now 11%.

This growth impacts on the entire pasta supply chain that sees in Italy one of this sector's unchallenged leaders, be it when it comes to the finished product, machinery and raw materials.



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GLUTEN-FREE PASTA: MARKET SIZES AND TRENDS



SALES BY VOLUME
6,360,581 Kg
+15.3 %



SALES BY VALUE
€ 30,772,954
+16.6 %

DECEMBER 2016 FIGURES COMPARED TO 2015

source: Iri



THE CHOICE OF SEEDS
THE CULTIVATION OF FIELDS
THE TRANSFORMATION
INTO QUALITY FLOURS
ALL IN OUR HANDS

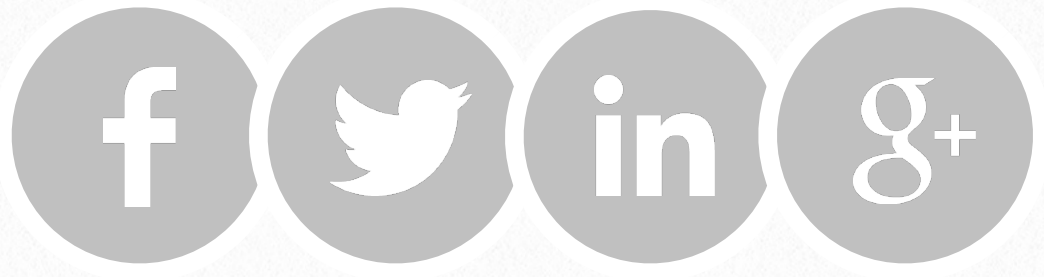


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4



The Truth about Pasta.
**Feeding the planet with
pasta? Yes, we can!**
So says Chef Bruno Serato

International Pasta
Organisation



The column written by the International Pasta Organization to combat false beliefs about pasta and reaffirm the importance of carbohydrates in a healthy and balanced diet.

Sir Chef Bruno Serato is an Italian philanthropist, restaurant owner and chef, author, and speaker. Together with Chef David Hertz, founder of Gas-tromotiva, he was the Ambassador of “The Power of Pasta Initiative.”, launched by IPO on the occasion of World Pasta Day 2017. More than 3 million plates of pasta have been donated by pasta makers worldwide. But the power of pasta goes beyond just a warm meal to fill the stomach. As Chef Serato said “Through the Power of Pasta, offering a simple dish like spaghetti with tomato sauce using local seasonal ingredients, we can help feed the hungry, meeting different culinary traditions and bringing people together over a healthy meal”. We have asked to Sir Bruno Serato, to shares his incredible story and vision.

Feeding the planet with pasta? Yes, we can!

by Bruno Serato

It all began that April 18th 12 years ago when I accompanied my mother Caterina to a benefit dinner at the Boys & Girls Club, a centre in the United States that works with disadvantaged children. It was the first time I ran into “Motel Kids”, poor, disadvantaged kids forced to live in poverty and forgotten in the motels that have become the refuge of the poorest families in Orange County, Los Angeles. I explained to my mother that, fortunately, these children eat lunch 5 days out of 7 at school, but when they return to their motels, where there is no kitchen, they often go to bed without supper. It was in that moment that my mother, so simply and straightforwardly, asked the question that changed my life forever: “Well, why don’t you make them a plate of pasta?”.

From that day on, I have been preparing for these children pasta with tomato sauce every evening. I was already a famous chef. My restaurant, the “Anaheim White House”, was just a few miles from Los Angeles and its clientele included many VIPs, American film and show business stars. I started with 20 plates of spaghetti with tomato sauce every evening and




I.P.O.
International Pasta Organisation

INTERNATIONAL PASTA ORGANISATION (IPO)
Founded in Barcelona on World Pasta Day 2005
Formally constituted in Rome on World Pasta Day 2006



MISSION

The IPO is a nonprofit association dedicated to:

- Educating consumers, health professionals, journalists, government officials and others about the merits and benefits of pasta, its great taste, its healthfulness and its simple convenience.
- Increasing consumption of pasta around the world.

ACTIVITIES

- Organizes research, promotional and educational programs and events about pasta, such as World Pasta Day and World Pasta Congress.
- Collects, organises and distributes nutritional, statistical and other information about pasta.
- With the support of a Scientific Advisory Committee, currently formed by a panel of 25 experts from 17 different countries, educates consumers and others through the media, conferences, research, publications, workshops, and other related activities.



MEMBERSHIP

The International Pasta Organisation now has 25 members (including two European Federations, UNAFPA and SEMOULIERS) representing 18 countries (Argentina, Belgium, Brazil, Canada, Chile, Colombia, Costa Rica, France, Guatemala, Iran, Italy, Mexico, Portugal, Spain, Turkey, United States, Uruguay and Venezuela).

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IPO Secretariat General c/o
AIDEPI
(Associazione delle Industrie
del Dolce e della Pasta Italiane)



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things grew from there. Today, we serve about 3,500 meals a day for the same number of kids who, otherwise, would go to bed with an empty stomach. We prepare them at the restaurant and then, around 4 pm, we deliver them to 50 citizen centres in 20 towns in Orange County. Until the start of 2017 when, unfortunately, a fire de-

stroyed the restaurant. In a single night, the fruit of my life's work went up in flames, but my thoughts immediately turned to the children. Luckily, a fantastic chain of solidarity was activated that allowed me to forge ahead and make use of other kitchens while I rebuild the restaurant

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which I hope to re-open early 2018 at the latest.

Initially, I was the one who shouldered all the expenses of “Caterina’s Club”, the non-profit that bears my mother’s name. Now, fortunately, the situation has changed thanks to the generosity of many donors who support me. The turning point was in 2011, the day CNN named me one of the “10 heroes” of the year, people that nobody knows about, but who do things that have a concrete impact on people’s lives. Media visibility increased significantly. I was contacted by the leading Italian pasta manufacturer who offered to help me. I owe them so much and thanks to them, my kids are never without pasta and tomato sauce. Other generous pasta-makers also joined forces with companies from a wide range of sectors to support us. To tell the truth, there is nothing heroic about what we do. The real heroes are these children who, every day, fight hunger in order to survive. Helping them makes me a richer person, inside.

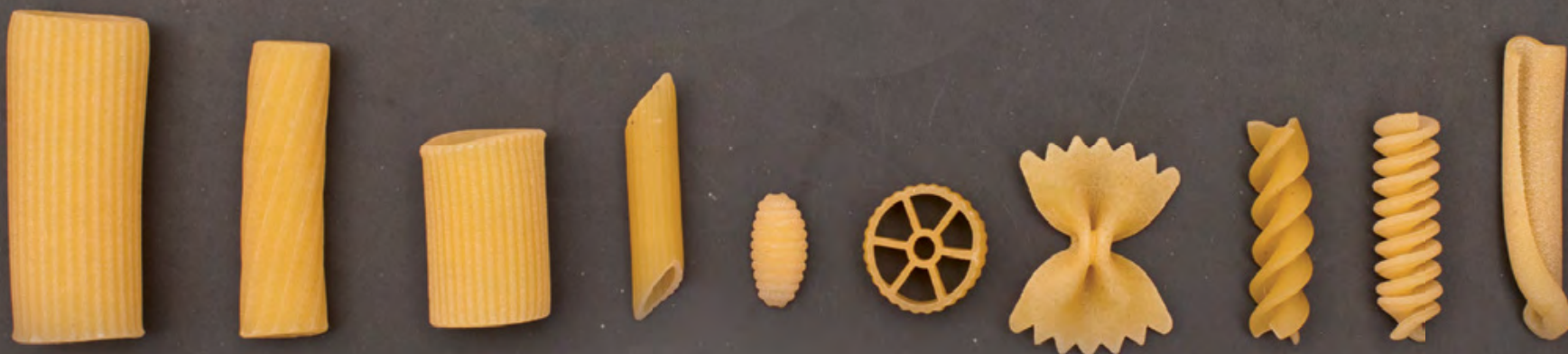
In March 2015 I celebrated the achievement of the first million plates of pasta served with a grand party for 500 kids. And, in the meantime, I also achieved my second dream, that of giving a real home to the Motel Kids with a real kitchen ... where they could make pasta. As of today, we have helped 140 families move into a

real home where they can prepare their own plates of steaming pasta with tomato sauce, just like the ones they grew up on in the community centres. I have also launched another wonderful project, the Hospitality Academy. We offer training in the hospitality sector to young people so they can find jobs and help their families. As I said at World Pasta Day in Brazil, where David Hertz and I spoke as ambassadors of the wonderful charity initiative, “The Power of Pasta”, promoted by the International Pasta Organisation, the important thing is that each of us stop talking and begin to do something concrete. And pasta has tremendous power: it is healthy, it tastes good and everyone likes it, it is an accessible food, sustainable and capable of feeding the planet.

Whether it is the over three million plates of pasta donated by pasta-makers who belong to the IPO, or just a single plate of pasta prepared for a neighbour in need, the essential thing is to do everything possible so that, in this world, there are fewer and fewer children who go to bed hungry – one of the most disgraceful paradoxes in our age of waste.

Mine and that of other chefs like David Hertz – who through “Gastromotiva” offers food sector training to those living in the favelas of Sao Paulo, Rio de Janeiro, Bahia and Mexico City, and works with Massimo

MANY SHAPES TO TELL IT.
ONLY ONE ASSOCIATION
TO REPRESENT IT.



11
ADHERING
COUNTRIES

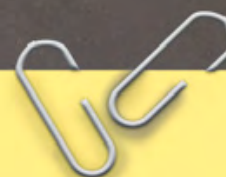
11.025
EMPLOYEES

5.147.403
TONS OF PASTA
PRODUCED

2.553.168
TONS OF EXPORTED
PRODUCT

OVER 35%
OF THE WORLDWIDE
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UN.A.F.P.A.

Union des Associations de Fabricants de Pâtes Alimentaires de l'U.E
Union of Organizations of Manufactures of Pasta Products of the E.U.

FOR FURTHER INFORMATION:

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Bottura in the RefettoRio project where food is cooked in soup kitchens utilizing unused products from restaurants – are examples of what is known as “Social Gastronomy”. A phenomenon we hope will continue to grow, in which celebrity chefs like us are not just protagonists of the star system, but also promoters and supporters of major solidarity initiatives.

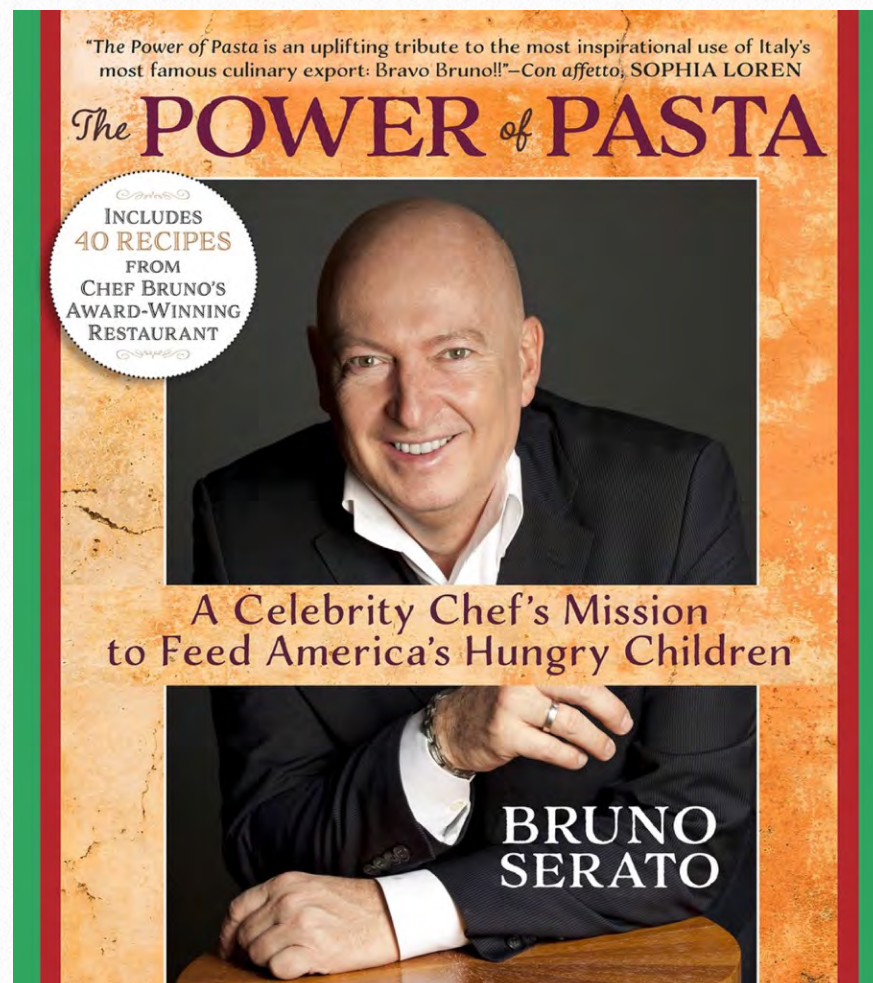
To tell about my vision, I recently published in the US a book entitled “The Power of Pasta”, the proceeds of which will go to the Caterina’s Club foundation.

On the cover is a dedication I received from a special person that makes me feel very proud:

“The Power of Pasta is an uplifting tribute to the most inspirational use of Italy’s most famous culinary export: Bravo Bruno!!”

Affectionately, Sophia Loren.

Pasta – a product of Italian origin that has succeeded in going beyond national borders and adapting itself to local cultures and customs – has the power to feed the world in a balanced way, to satisfy our taste buds and protect the planet, but first and foremost, to fight hunger with a smile.



The Truth About Pasta

Starting with the May 2015 issue of Pastaria, the International Pasta Organisation (IPO), a nonprofit association dedicated to promoting pasta consumption and awareness around the world by educating about the merits and benefits of pasta, introduced this new column called, “The Truth About Pasta”.

It is part of IPO’s communication programme, designed to combat the rise of unhealthy fad diets and change people’s perceptions of pasta by informing, educating and encouraging eating pasta as part of a healthy lifestyle.

For information: www.pastaforall.org | f.ronca@internationalpasta.org

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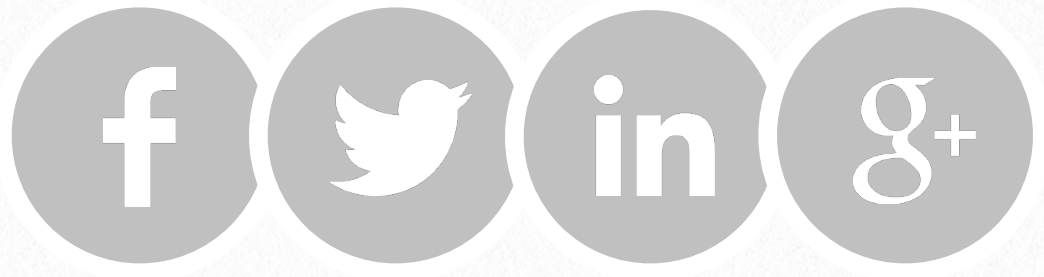
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5



Proceedings of the Pastaria Festival. Quality

Nicola De Battisti,
Anna Campolongo
Pastificio Rana

and technological innovation in respect of organoleptic characteristics, fundamental parameters for the success of fresh pasta



The report presented by Nicola De Battisti, Head of Quality of the Rana Pasta factory, at the workshop entitled *Fresh pasta, from supporting to leading role on international markets* organised by APPF as part of Pastaria Festival 2017.

Fresh egg pasta has always been viewed as a home-made food product, from the different types associated with the specific traditions of Italy's regions, that has become very widespread on the market since the fifties and sixties.

It was against this backdrop that the totally hand-made production of fresh egg pasta, both filled and not, began with Giovanni Rana. In 1962, having noticed that shopkeepers in the area of Verona were offering home-made egg pasta, the young entrepreneur decided to take their place, when it came to production, becoming the supplier.

A totally hand-made product, therefore, that has to be packaged in paper bags and eaten within a few days.

From this initial stage, came a first industrial development that saw a turning point in 1984, the year in which the use of what was then referred to as "controlled" atmosphere was approved for the preservation of food products. The use of a controlled atmosphere combined with a technology that foresaw double pasteurisation (the first directly in contact with the product and the second on the already packaged product), led to the first widespread distribution of fresh egg pasta across the market bearing the Rana brand name.

This phase's strong point was the fact that a dish that was difficult to produce at home was now being made available to Italian families, produced industrially, but gastronomically valid and micro biologically stable.

From this point onwards, different key factors contributed to the growth of fresh egg pasta on the market. These can be summed up as: "quality" factors, understood to mean system, product and process quality and the factors associated with constant "innovation and research".

With regard to "quality", the introduction of systems such as the ISO:9000 series of standards first and subsequently the GSFI standards, specifically for food industries, provided a substantial contribution to the spread of a common, organised and coded approach. What occurred at the same time was a process of improvement of the quality of the raw food materials, a process aimed, on the one hand, at "customising" the raw materials

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to meet the needs of processors and, on the other, to make the supplier an increasingly integral part of it.

On the other hand, for the processor the organoleptic test of the incoming raw material became essential for maintaining the finished product's required characteristics, becoming the "key test" for the acceptance of all the ingredients before their processing. Attention then shifted from the compliance of health and hygiene requirements, by now more than consolidated and standardised in the current food industry, to a growing attention to respecting the desired organoleptic characteristics.

A new quality of the production processes had to be added to these two aspects.

With the advent of "soft" technologies, aimed at preserving the product as much as possible and therefore the use of targeted treatments, aimed at generating the minimum impact on the product, whilst providing the utmost result, they moved on to the use of single pasteurisation, filtered air and the cooling of the product before packaging (always in filtered air) carried out in isolated chambers, with a pressure that is higher than that in the surrounding areas.

All of this, always validated by "in-line" cooking tests of the product, carried out at different stages of the process: after shaping, after pasteurisation and after packaging. Therefore, the concept of "customis-

ing" the process depending on the desired finished product also applied to the finished product.

At the same time, innovation and research resulted in the identification of ad hoc recipes for the creation of the semi-processed vegetables; recipes capable of enhancing the characteristics of the raw materials and reproduce them faithfully in the fillings of filled pasta. This was in addition to the development of technologies targeted, on the one hand, to enhance the filled pasta sheet, through the creation of a rough pasta (the so called "Sfogliagrezza" line) and on the other, to enhance its filling, with the development of a very thin sheet (the so called "Sfogliavelo" line) The creation of different thicknesses of sheet made it possible to offer consumers products to suit different needs (products with thin sheets with far quicker cooking times than those of classical pasta) and palates (products with thin sheets with a higher percentage of filling, making it possible to taste the fillings that are more creamy or with pieces). The constant search for new flavours lead to the proposal for different fillings and therefore finished products. As a result, this saw a move from specific vegetable fillings, to provocative ones (like "chocolate filled ravioli"), to products containing two different flavours in the same package, ending up with products inspired by the cu-

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Qualità ed innovazione tecnologica nel rispetto dei caratteri organolettici, parametri fondamentali del successo della pasta fresca

PARMA, 29 SETTEMBRE 2017

linary traditions of different countries around the world.

There was also talk of innovation even from a packaging point of view, where the classical plastic bags or tubs were added to with paper packaging.

Innovation and research also led to the segmentation of the ranges into different categories. This saw a move from the traditional lines (dedicated to families with young children, with classical creamy fillings), to more fancy products (large shapes with a combination of particular flavours), to others that increasingly turned to a concept of vegetable-rich nutrition (for adult consumers who are more mindful of these aspects).

Innovation and research also aimed at satisfying the different tastes of different coun-

tries: pasta with a “duck filling” or “Comté cheese” for France; “tuna and tomato” or “goat’s cheese and onion” for Spain; with a variation of “chicken” fillings, for the United Kingdom, through to totally different alternative ideas for eating fresh pasta, in a kit of 3 elements (pasta, sauce, chicken) to be cooked together in the microwave, aimed at the US market.

It can be said that Quality and Innovation in fresh pasta led (and still do so today), through the use of specific technology, to the creation of an idea of a product that by fully complying with its own organoleptic characteristics, has resulted in increasingly greater consumption and distribution around the world.



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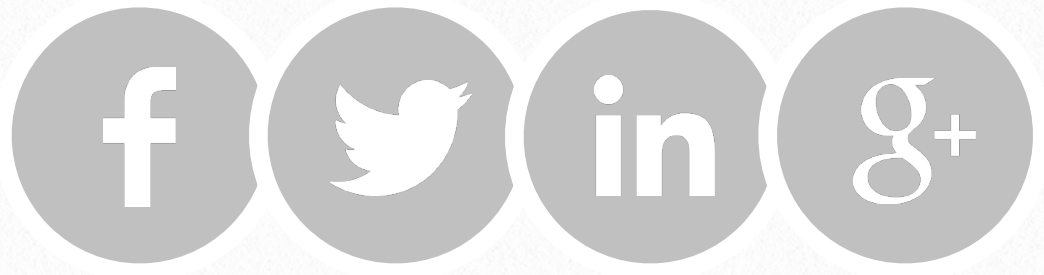


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6



Italian pasta: exports are flowing to overseas countries

Centro studi economici
Pastaria



But the EU is curbing the turnover, which has lost almost 3 percentage points over nine months.

Exports of Italian pasta to Germany and the United Kingdom are disappointing. But the balance of sales abroad is up in overseas markets, with significant progress made in the US, Japan, Canada and China.

ISTAT data from September 2017 provides an overall reassuring picture for the sector, which is increasingly exposed, however, to pressure from new competitors, especially Egypt and Turkey.

If we look at volumes, exports of Italian pasta have only suffered a fractional decrease compared to the first nine months of 2016. This 0.8% decrease, however, amounts to 3 percentage points in terms of currency, with a decrease in over-the border turnover over three financial quarters, dropping below the threshold of 1.7 billion euro.

It could have been even worse, considering the unsurprising decline in FOB prices (net of freight and insurance) in a year that has seen grain and semolina cost less on average than the previous year.

In other words, the 3% turnover loss may be more than two-thirds due to the decrease in the unit values of the exported pasta, down on average from 1.17 euro/kilo to less than 1.15 euro.

The lopsided trend, confirmed by a contraction in sales volumes in the EU countries (- 4.2%) and an increase of more than 6 percentage points in other countries, induces some reflections that seem primarily to highlight the need to strengthen, where possible, promotional efforts in those traditional outlets (Germany and the United Kingdom remain the two main markets of reference) in which Italian pasta is losing significant market shares. In this regard, consider that the export to Berlin has recorded a heavy 12.3% drop in volume and a 16% loss in turnover. Physical shipments of Italian pasta across the Channel have decreased by 4%, which is roughly analogous to the drop in cash revenues.

Only France has remained steady for both revenues and quantities exported. Performance in Belgium, another important commercial outlet, is positive, with exports showing a strong 13% in real movements, which, nevertheless, left the turnover unchanged.

In the USA, which remains the fourth-largest market for Italian pasta, despite the unfavourable exchange rate, shipments have experienced a

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ITALIAN PASTA EXPORTS IN THE FIRST NINE MONTHS OF 2017

	Jan-Sept 2016 (tons)	Jan-Sept 2017 (tons)	Variation	Jan-Sept 2016 (.000 euros)	Jan-Sept 2017 (.000 euros)	Variation
World	1,464,083	1,452,862	-0.8%	1,720,406	1,669,951	-2.9%
EU-28	977,381	936,035	-4.2%	1,145,231	1,080,653	-5.6%
Outside EU-28	486,702	516,827	6.2%	575,175	589,299	2.5%
Germany	293,879	257,760	-12.3%	299,469	251,687	-16%
United Kingdom	197,791	189,842	-4%	236,533	226,471	-4.3%
France	182,910	182,795	-0.1%	223,154	223,197	0%
United States	128,189	133,832	4.4%	193,803	200,667	3.5%
Japan	53,121	56,224	5.8%	58,048	54,935	-5.4%
Belgium	37,559	42,503	13.2%	51,155	51,030	-0.2%
Sweden	38,823	37,311	-3.9%	49,978	47,426	-5.1%
Spain	29,246	36,093	23.4%	56,486	69,645	23.3%
The Netherlands	38,095	32,601	-14.4%	48,513	39,918	-17.7%
Austria	26,436	26,449	0%	30,870	30,145	-2.3%
Switzerland	24,285	25,185	3.7%	38,629	39,570	2.4%
Canada	19,732	20,476	3.8%	27,632	28,933	4.7%
China	16,710	20,338	21.7%	14,970	17,125	14.4%
Poland	18,790	20,049	6.7%	21,133	20,816	-1.5%
Israel	19,400	19,724	1.7%	16,331	15,414	-5.6%
Australia	21,949	18,765	-14.5%	27,575	23,904	-13.3%
Brazil	14,361	16,620	15.7%	15,547	18,205	17.1%
The Czech Republic	18,795	16,599	-11.7%	17,329	14,300	-17.5%
Russia	16,308	15,322	-6%	14,192	13,723	-3.3%
Denmark	17,409	15,120	-13.1%	21,751	17,983	-17.3%
Venezuela	4,157	8,332	100.4%	3,362	5,533	64.6%

Source: Istat



growth of over 4% (+ 3.5% cash revenues). The results were also positive in Japan, even if a 6% growth in volume corresponded to more than 5% drop in turnover. Sales were also up across the board in Switzerland and Canada. But the real boom was in China where the entire range of Italian pasta products is enjoying great success, attested to by a 22% increase in physical shipments (over 20 thousand tons) and 14% higher revenue compared to January-September 2016, which jumped to over 17 million euros.

On a final note, the results have been excellent in Brazil (+ 16% in volume, + 17% in value), while the balance of sales has been negative in Sweden and the Netherlands, in three quarters that have also seen a negative result in Australia and Russia.

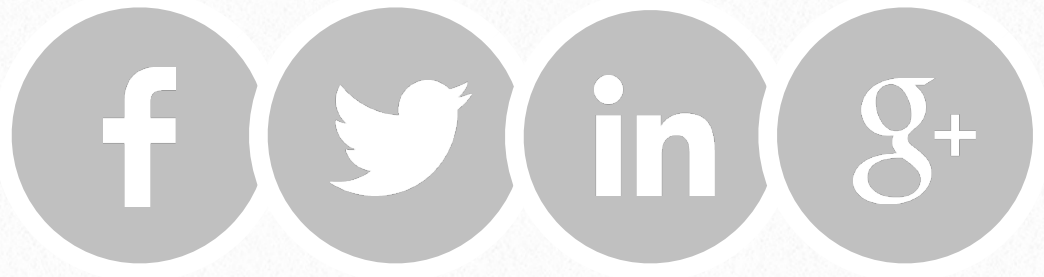


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TRAFILE

7



Beyond the wheat war: a memorandum of understanding has been signed to increase the availability of quality Italian durum wheat

Press release



Farmers, cooperatives, pasta-makers and the milling sector sign a memorandum of understanding to increase the availability of quality Italian durum wheat.

A supply chain agreement to reinforce the competitiveness of Italian pasta by increasing the availability of Italian durum wheat suitable for pasta-making and providing incentive to sustainable production and traceability, and supporting those farmers who choose to put quality first. These are the main points of the memorandum of understanding to improve Italian durum wheat that was recently signed by AIDEPI – Italian Association of Confectionery and Pasta Industries, Alliance of Italian Agrifood Cooperatives, CIA – Italian Farmers’ Association, Confagricoltura, Copagri – Confederation of Italian Agricultural Producers and ITALMOPA – Association of Italian Millers.

The signatories represent, overall, just under half of the entire Italian agrifood industry, with a value of around 60 billion euros. In terms of agriculture, this translates into over 3 million members in the farming sector, 1.1 million farms and 5,000 agrifood cooperatives located throughout all of Italy. In terms of the milling sector, over 80% of the total processing capacity of wheat in Italy; and for the pasta-making industry, 80% of an established sector comprised of 100 companies that employ 7,500 people in Italy and generate 4.7 billion euros.

The memorandum of understanding is, therefore, a concrete response that is voluntary and a “team approach” to a number of problematic aspects of the supply chain that hinder growth in the sector. Italy is first in the world in pasta production (3.6 million tons per year) and export (2 million tons), but its #1 position is at risk for three reasons. Firstly, strong international competition, especially from Turkey and Egypt which are eating into the market share of the Italian pasta industry, also as a result of support from their respective governments. Secondly, weak support from Italy’s economic system has, over time, noticeably contributed to digging a furrow between the Italian agrifood pasta sector and those inside and outside Europe in terms of competitiveness, growth and support for exports. And, finally, the supply of Italian wheat, already penalized by excessive fragmentation, is often not fully suited to the quality requirements of millers and pasta-makers, and the lack of adequate storage facilities renders difficult



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the exploitation and classification of the raw material with the result that foreign markets are turned to for its supply.

Five areas of intervention were identified by the wheat-pasta supply chain organizations to promote the quality of Italian durum wheat, each linked to concrete measures and medium-term initiatives, and all put into black-and-white in the agreement that was recently signed.

1. Increase the availability of high-quality Italian durum wheat produced using sustainable methods to meet the needs of the milling and pasta sectors.

Today, domestic durum wheat production (on average, 4 million tons per year) is sufficient to meet only 70% of pasta-maker demand. But Italian wheat does not always, and not every year, meet the quality standards required by pasta purity law. According to analysis by Crea (for the period 2011-2016), about 30% of Italian wheat was not sufficiently suitable for pasta-making, while only 35% was of high quality. Overall “improvement” in the quality of Italian wheat is not only a guarantee of an even better plate of pasta, but also greater sustainability of Italian fields, greater opportunities for farms and lower utilisation of the more costly foreign raw material.

2. Provide incentive and support to exemplary farming methods, with production

bonuses for attaining quality standards of the wheat and the characteristics of the area of production.

Farming methods and the environmental conditions of the area (climate, soil composition, etc.) influence the quality of durum wheat (including its protein content) and have a differentiated impact on the profitability of the farmer itself. The agreement focuses on farming contracts that take into account the range of geographical and climatic variables in Italy to provide incentive for quality production, including in more hostile and drought-prone areas. With this approach, already employed by a number of players in the supply chain, pasta-makers are guaranteed wheat that is suitable and farmers a secure profit, in line with their efforts and specific environmental and climatic conditions, while also providing protection from market fluctuation.

3. Gradually consolidate durum wheat supply and undertake a census of the storage centres suitable for the preservation of quality durum wheat.

Fragmentation of supply and lack of suitable storage facilities have, to-date, made it difficult to classify and make full use of Italian durum wheat. In Italy, there are around 1,000 storage centres, but durum wheat accounts for only 26% of



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all preserved grains. A third party will be assigned the task of evaluating these facilities to assess if there is an adequate number of silos to meet the current and future needs of farmers, millers and pasta-makers, and if they are capable of guaranteeing storage differentiated by the level of grain quality.

4. *Foster training, research and innovation in the Italian wheat/semolina/pasta supply chain.*

The question of the quality of Italian wheat and pasta also depends on innovation and capitalizing on the strengths of specific geographical areas, for example, by providing incentive for collaboration with innovative startups and companies in the agronomy and agrifood sectors. The agreement also provides for professional training and refresher courses for farmers and those in the sector, as well as computer resources to promote the adoption of more sustainable farming methods. The supply chain is also committed to initiating collaboration with research bodies to calculate the point-of-parity for farms in different areas of production and to develop new certified seeds which meet market requirements and reflect the heterogeneous nature of Italy itself, as well as specific programmes to promote local grains.

5. *Promote and defend in a concerted manner a strong image of Italian pasta and guarantee its safety, including through computer-based traceability of the various phases along the supply chain.*

Only the best wheat, the tastiest, healthiest and safest, can “become”, through expert industrial processes, the best pasta in the world – Italian pasta. But the quality of this product is called into question on a number of fronts, including as a result of debatable media and political controversy. The result: Italian consumers who are disoriented and a dangerous loss of competitiveness in international markets. With this agreement, all those involved in the supply chain also commit themselves to talking about the quality of Italian pasta in a clear and cogent way on both a national and international level, and clarifying aspects regarding the security and reliability of pasta in general in order to stem the tide of fake news about this product that is the symbol of Made in Italy and the Mediterranean diet.

In order to implement this supply chain MoU, the organizations involved will create three working groups that will be active, respectively, in issues regarding agronomics, research and development and communications.

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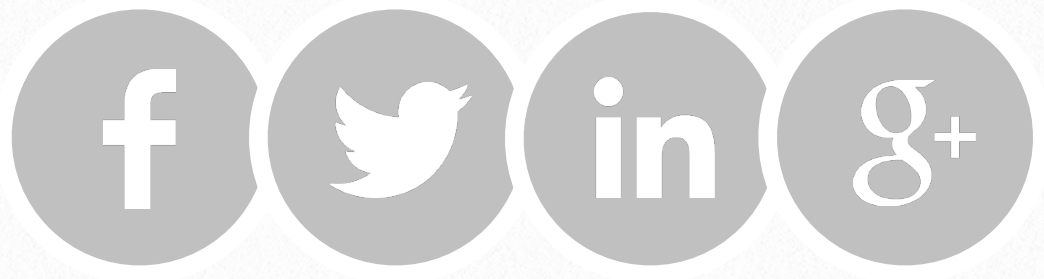
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***Proceedings of the
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Daniela Ampollini
Trevisan & Cuonzo

**food has IP: how to use it to protect
your business and make it grow**



Lawyer Daniela Ampollini's contribution at the workshop dedicated to *Industrial and intellectual property rights in the food sector: patents and more*, run as part of Pastaria Festival 2017.

Even food has IP: how to use it to protect your business and make it grow.

I am an expert in industrial law. In other words, I deal with consultancy and protection concerning industrial and intellectual property, otherwise known as “IP” for short. I have been doing this job, with the Trevisan & Cuonzo law firm (Parma, Italy), for around 18 years and a good part of my time is spent in court, where the practical side of protecting IP takes place.

Unfortunately, in Italy, also due to the fact that the legal system isn't one of the best, with areas of inefficiency and court cases going on for exceptionally long periods of time compared to European standards, operators have developed a certain lack of faith in the idea of litigation as an effective tool available to companies. This is probably one of the reasons why there is a general tendency in Italy to limit investments in IP. This does not mean that Italian companies do not invest in innovation, but even when they do innovate they tend to invest in a limited - often insufficient - way in the adoption of measures (be it filing a patent, cultivating a registered trademark, etc.) which should protect their innovation in a concrete manner, mainly due to their belief that “in any case, it won't make much difference”, or “we're better off keeping away from the courts and the red tape of legal proceedings”. This is especially true in sec-

tors, such as the food industry, perceived as having a lower vocation towards IP than others, such as the pharmaceutical and chemical industries, mechanical engineering, electronics and information technology sectors, for example, where talking about innovation is without doubt more immediate.

In spite of what these premises might lead us to believe, the truth is that IP also exists in the food sector, so much so that there is no lack of cases in which food companies (not always Italian, it has to be said) have used it to repress violations and, therefore, as a valid competitive tool to their advantage. One by one, I will be taking a brief look at the various IP titles available to companies operating in the food sector, for each one citing an example of one or more cases which actually went through the Italian courts.

Patent

Let's start with the patent, i.e. the main tool in the IP field. In short, a patent confers the exclusive rights to exploit a brand-new invention, unlike any known to that date, for 20 years. In the food sector, in the first instance a patent can be used for all those inventions concerning industrial processes and machinery. The example given in this regard refers to a case definitively

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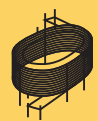
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decided by the Court of Cassation in 2011 concerning Barilla versus Pastificio Fazion. Barilla held a patent for an application used to dry pasta where the pasta, unlike the machinery known at the time of filing the patent, was not laid down horizontally on the surface of the drying oven, but was placed between two perforated plates that held it vertically in relation to the conveyor belt so that the pasta was hit transversely by the hot air, thus making it possible to dry larger amounts of pasta simultaneously while at the same time reducing the risk of deformation. The counterparty had adopted a similar system - with the pasta positioned vertically - but with plates that were grooved as opposed to perforated. Said counterparty therefore maintained that the difference in design was sufficient not to fall within the scope of patent exclusivity. The judges eventually came down in Barilla's favour by reasoning that the solution adopted by Fazion did not really differ from Barilla's invention, given the position of the pasta placed vertically between two plates. Barilla thus obtained a cessation order against its opponent. (Barilla Vs. Pastificio Fazion - Court of Cassation, 30 December 2011, No. 30234).

In the food sector, a patent can also be used to protect a recipe, including the process for preparing an industrial product. Here the example given concerns a dispute

between two multinational food sector giants – Unilever and Star – which often come up with similar products and, as a result, often end up in litigation. In this case, Unilever owned the patent for an invention concerning the preparation of the Knorr brand “Cuore di brodo”, the “jelly” stock cubes which dissolve more easily than traditional stock cubes, and succeeded in obtaining an injunction from the Court of Turin against Star relative to a similar product, made based on the same recipe, called “Fondente in padella” which is, in fact, currently no longer available on the market, at least not in Italian shops (Unilever Vs. Star – Court of Turin , 22 July 2015).

Speaking of recipes, it should be mentioned that the patent is not always the right tool. It is well-known, if not legendary, that the famous formula for Coca Cola is a secret and has been since the product first came onto the market at the end of the 1800s, making it impossible for anyone to faithfully reproduce it to this day. In fact, it should be borne in mind that whenever you decide to protect an invention with a patent, the invention must necessarily and irremediably be disclosed, i.e. described in detail in the patent application which will be subject to publication (publication being the requirement requested by the system in return for conferment of exclusive rights). Since the exclusive patent is of lim-

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ited duration (20 years from filing - which cannot in any way be extended) it is clear that at the end of the exclusivity period competitors will freely be able to reproduce the product, knowing how to do so thanks to the patent. It is therefore necessary, before proceeding, to ask oneself how likely it is that third parties will be able to reproduce the formula or recipe by simply acquiring the product on the market, as well as about the type of protection conferred by a patent on the one hand and industrial secret on the other; easier, but short-lived the former; more difficult to obtain in practice, but potentially perennial the second (as proved by Coca Cola). Always of a patent nature - even if with significant differences that would take too long to list and discuss here - is the so-called Plant Breeders' Rights (PBR) Act. The breeder is the individual who, through various methods, ranging from traditional selection to so-called "genetic engineering" which affects the phenotypic and genetic make up of plants, creates a "new plant variety" requiring protection under the aforementioned PBR. In this field, for many years there were very few cases presented before the Italian courts. This situation is now changing, and there are increasingly more frequent cases in which individuals who have identified new plant varieties - be they vegetable varieties (such as let-

tuce, tomato, etc.) or agrarian (such as wheat, rice, barley, etc.) - and have obtained property rights, are turning to the courts to defend these rights against anyone marketing seeds in violation thereof. The case reported in this regard concerns one that ended in 2012 before the Court of Milan, in which the Dutch company Rijk Zwaan obtained PBR for a particular variety of lettuce, against an Italian company which was marketing seeds obtained from propagating the variety, and moreover, misleadingly giving it the name of another variety. In this case the Court of Milan, overcoming a number of obstacles related to the identification and acquisition of alleged counterfeit seed samples and verification - also based on molecular investigation - of the fact that the acquired seeds did in fact belong to the protected variety, finally issued an injunction and an order to pay compensation. (Rijk Zwaan Vs. Agriseeds - Court of Milan, 12 November 2012).

Trademark

Moving on to the trademark, possibly the IP tool which first comes to mind in relation to the food sector. First of all, the trademark - and in particular its registration - serves to protect a name, be it the name of the company or the name of a product, on the assumption that if a com-



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petitor were allowed to use the same or similar trademark to that of others, the market would be confused as to the manufacturing origin of the products. Here is another Unilever case, this time as a defendant for alleged trademark infringement against a competing company. The lawsuit was filed by a company which produces ice-cream preparations, holder of the rights for a figurative mark containing the word “Cookies” (in the sense of biscuits) and a logo whereby the two “O”s in “Cookies” were shaped like two biscuits. Unilever, which had launched the cookie-flavour “Cookie” Cornetto and had put the word cookie on the wrapper using the same idea, i.e. two biscuits in the place of the two “O”s in “Cookie”, was accused of having violated the exclusive rights of the adversary. Unilever, however, was acquitted, since the court sentenced that a trademark consisting of the word “Cookies” for a biscuit-flavoured product was to be considered a trademark having a limited capacity for being distinctive and was therefore “weak”, and that the simple fact that Unilever had also used the representation of cookies instead of letter “O”s was not enough to create confusion on the market, the two trademarks respectively used by the two opposing parties being sufficiently different. The lesson learnt in this case is that the trademark – an apparently simple

tool to use – must in fact be evaluated and studied carefully in order to create exclusive rights that can effectively be protected in practice. (Unilever Vs. Optima - Court of Milan, 7 August 2012).

The trademark tool can also be used to protect the shape of a product. In which case it is known as a “shape trademark”. The example given here concerns Ferrero which tried to obtain protection against a competitor who had launched its own chocolate-based products of a shape respectively similar to the well-known products of the Piedmont manufacturer, namely Ferrero Rocher and Kinder Bueno, based on it having registered the shape trademark for these two products: the round shape of Ferrero Rocher and the bar with domed segments of Kinder Bueno. This case is particularly interesting because it discusses the requirements of the shape trademark with reference to those of patent protection. In essence, Ferrero obtained protection against the imitation of Kinder Bueno, while it failed to obtain protection against the imitation of Ferrero Rocher. In particular it was noted that Ferrero had initially requested and obtained patent protection for the shape of Ferrero Rocher which had since expired, thereby attributing a value eminently functional to the shape itself and for this reason considered not capable of constituting a shape

trademark. (Ferrero Vs. Sanges - Court of Milan, 11 August 2014).

Geographical indications

Geographical indications are, in the food sector, contiguous to the trademark.

These, as the words themselves say, are those indications attached to products to identify their geographical origin. In a broad sense, even the expression “Made in Italy” is a geographical indication. Those which normally attract most attention however are the so called “certified geographical indications, i.e. registered and recognized. In brief, in the world of food products there is a community-based regulation, dating back to 1992, by which products that can be defined as “typical”, the typical nature of which derives from some level of connection with a given territory, can be protected, for example as PDO (Protected Designation of Origin) or PGI (Protected Geographical Indication), based on a procedure by which production specifications are submitted and approved so that only products which comply with these specifications, (and consequently subject to monitoring by the appropriate authorized bodies) can boast PDO or PGI status. The interesting case given here is the Italian party in a complicated dispute involving Bud beer. The Budweiser and

Bud trademarks have for many years distinguished an American beer, produced in Saint Louis in the United States since the mid-1800s when the brewery was founded by a German migrant who had the idea of calling his beer with the name – “Budweiser” – indicating origins in the Bohemian city of Ceske Budejovice, a city which, due to its being on the German border and its geopolitical past, also has a German name, Budweis. Problems began when the Czech Republic joined the EU in 2004 and obtained the PDO for its own beer which really is produced in the city of Ceske Budejovice, Budweiser Budvar. This led to a series of lawsuits all over Europe, with different outcomes. In Italy, the Czechs won after a long dispute which concluded in the Court of Cassation in 2013 according to which today, the beer from Saint Louis can only be marketed under the Bud brand in Italy since the Budweiser trademark was held to be a misleading indication due to the fact that the product is actually manufactured in the United States (Anheuser-Busch Inc. Vs. MIPAAF - Court of Cassation, 19 September 2013, No. 21472).

Unfair competition

Another contiguous theme is that of unfair competition, which often comes to the aid

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of manufacturers where intellectual property rights fail. In fact, the Italian legal system contains regulations imposing correct behaviour among competitors. Among other things, it is forbidden to demeaningly imitate competitors' products in such a way as to create confusion on the market or behave like parasites, in other words following in the wake of competitors, copying their ideas or commercial strategies, thus unduly benefiting from the investments of others. For example, the institution of unfair competition helps in those cases of imitations where the trademark tool or other registered rights either don't exist or aren't effective. This is the case of "lookalikes", i.e. products that avoid copying registered trademarks entirely while clearly recalling a competitor's product, often a market leader, in the mind of the consumer. Cases of this type which have actually been dealt with by the courts are few and far between, and there is a reason for this. Often those making products which in some way resemble those of market leaders are the large-scale distribution outlets, with their "private labels", consequently the balance of power in the commercial arena probably suffices in stopping the onset of inconvenient legal proceedings. However, there are some cases. One is the case which involved a Nestlé product sold under the Galak trademark. A competitor had put on

sale an Easter egg called Ciocolak, the overall image of which strongly resembled the Galak brand Easter egg, while still remaining on the outskirts of trademark infringement: the use of the letters "lak" in the name "Ciocolak" did not seem sufficient in itself to damage the exclusivity of Nestlé's "Galak" brand. The latter, however, won the case, as the judge considered that, although there was no trademark infringement, the overall similarity in "appearance" of the competitor's product should be sanctioned as an act of unfair competition. (Nestlé Vs. Wal-Cor Corsanini - Court of Milan, 9 June 2015).

Copyright

Finally, copyright should be mentioned, i.e. the exclusive right given to the author simply for being the creator, in the case of works of a creative nature usually belonging to the fields of literature, visual arts, music or cinematography. Well, it may seem strange, but copyright can be relevant even in the field of industry and, why not, also to the food sector. Two examples can be made in this regard. The first is not a real case, but a one created specifically for study purposes, for a so-called "mock trial" that was held in Milan in 2015. To be precise, a fake court was set up in which the imitation of a famous "signature dish"

by one of the Italy's greatest chefs, Gualtiero Marchesi's "Riso, Oro e Zafferano" (gold leaf saffron risotto) was put in the spotlight. The way in which this dish is presented is very characteristic, so much so it is even familiar to the general public, thanks to the design of the black plate holding the yellow rice topped with a square of gold leaf placed in the centre. In this case the "fake" judge (played by a real judge from the Court of Milan) declared that the dish of the famous chef could in fact avail of copyright protection and, therefore, imitation of the dish's outer appearance could be prevented. ("Riso, Oro e Zafferano" by Gualtiero Marchesi Case - Mock Trial of 13 November 2015). The other example does not really concern the food sector, but could fairly easily be applied. In this case the two opposing parties were the cosmetic companies, Kiko and Wycon, both of whom had adopted two similar distribution formulas. Kiko succeeded in obtaining, at first instance, an injunction and compensation for damages against the competitor, considered to have illegitimately reproduced the format of Kiko's store, based on the assumption that this format deserved protection under copyright. I understand that an appeal has been filed so we shall have to see how it develops. The lesson learnt is without doubt that even copyright could be a useful tool,

from a competitive viewpoint, in protecting the investments made by companies also in the creation of the format, for example, a restaurant or a cafeteria ("Riso, Oro e Saffron" by Gualtiero Marchesi Case - Mock Trial of 13 November 2015).

In conclusion, experience shows that even companies in the food sector can use intellectual property tools to defend their investments and from a pro-competitive perspective. Obviously, when choosing the right tool and how best to use it, it is always advisable to seek professional advice...



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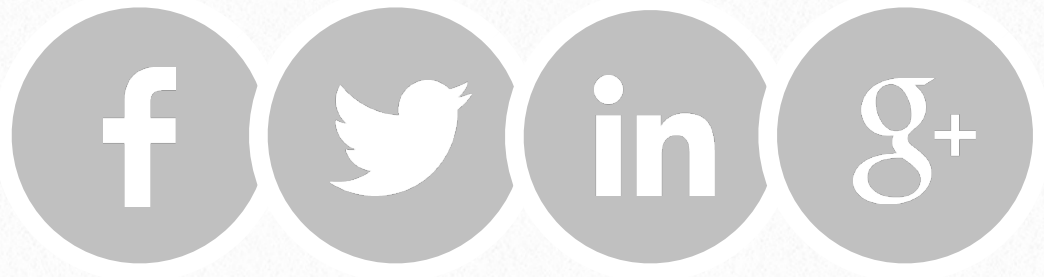


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Workshop, meeting and association dinner for APPF



The end of 2017 was crammed full of initiatives for the Italian Association of Fresh Pasta Producers (APPF) that closed the year with numerous events: a workshop, the association's meeting and traditional Christmas dinner.

Third APPF workshop

The third workshop organized by APPF (Italian Association of Fresh Pasta Producers) took place on 20 October 2017 at the Molino Casillo headquarters in Corato (Bari, Italy).

The event was well-attended and taking part were APPF President Cav. Giovanni Rana and Pasquale Casillo, President of the Casillo group.

Francesca Zecca of “Food” offered a brilliant presentation on “Consumption macrotrends in the fresh pasta market”, Beniamino Casillo provided an excellent overview of the “Impact of raw materials on product innovation”, followed by Caterina Ambanelli of the Ambanelli Studio in Parma who provided insight into the intricate and uncertain legislative panorama, while Angelo Gemma (Lutosa Italia) outlined what’s new in gnocchi production today and Gabriele Molinari of Calvatis and, finally, Elio Di Curzio offered extremely interesting reports on equipment sanitization and the “deceptive aspects” of the herb and spice market.

There followed an elegant lunch served at the Casillo Group offices.

APPF general assembly and Christmas dinner

On 1 December 2017 the APPF general assembly was held in the new locales of the Ristorante “Famiglia Rana” in Oppeano (Verona, Italy).

On the agenda was the re-election of company officers. Elected as members of the board were Paolo Luinetti of Raviolificio Mylena, Remigio Marchesini of Pastificio Avesani and Roberto Zampedri of Il Pastaio di Brescia. Also elected as auditor was Carlo Crivellin of Crivellin S.r.l.

Among the topics on the agenda that were discussed was the sharp rise in the egg market and the consequent risk of a rise in the price of egg pasta. Of special interest was the status report on the “Fresh pasta and gnocchi market and prospects for the future” presented by President Cav. Giovanni Rana.

At the close of the meeting, the traditional Christmas dinner of company associates was held, also attended by APPF sustaining members.

Late into the evening over fifty people raised their glasses to toast the future of fresh pasta.

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- Per tutelare pasta fresca e gnocchi, anche da un punto di vista legislativo nel loro progressivo inserimento nei mercati europei attraverso **ECFF** (European Chilled Food Federation).

I NOSTRI SERVIZI

- Una guida anticipata sui trend di mercato e su quelli tecnici.
- Un appoggio sicuro su problemi legislativi generali ed aziendali dove A.P.P.F. è tradizionalmente informata.
- Una gestione associativa concorde e non burocratizzata dove il Presidente e gli Associati hanno diritto ad un voto e la segreteria è sempre vicina.

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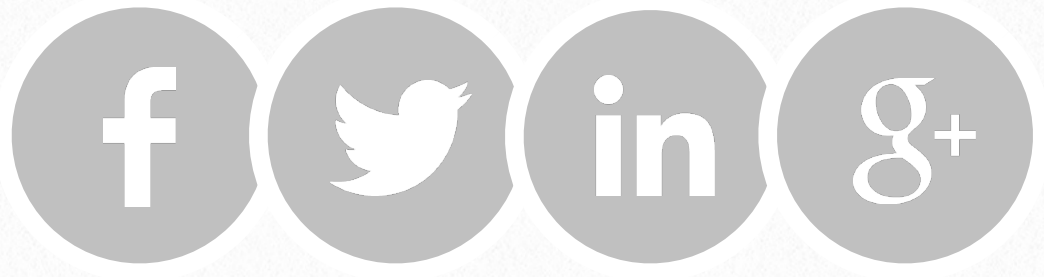
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10



Brussels: almost no change for grain in the medium-term

Centro studi economici
Pastaria



Product development charts show a clear gap in the dynamics of the wheat chain in the EU, with decreases in durum wheat crops.

In the medium-term, grain prices on international markets will not suffer substantial shake-ups to their current lows. This is according to the predictions of the European Commission's statistical experts, who do not see any substantial imbalances in the fundamentals, even given the uncertainties associated with the climate.

The stock-to-use ratio, the ratio between inventories and consumption, which provides a summary indicator of the degree of coverage of needs with inventories alone, will remain at "reassuring" levels both for milling wheats (i.e. those destined for the production of flours and semolina for pasta and bakery products) and for feed grains, intended for feed purposes, upon which the evolution of global corn crops will have a significant impact.

The 2030 projection, which spans a period of just over ten years, outlines a growth scenario for both production and world consumption. Limited to soft and hard grain wheats, Brussels, in the *Agriculture Outlook*, published in December, sets the production bar at the end of the forecast period at just over 169 million tons, foreseeing an increase to the current figure in 2030 of some 12%. However, the charts show a clear divergence in the dynamics between soft and hard wheat, with an increase for the former (production rising from 141.5 to 160.7 million tons), but with a rather marked decline for durum wheat, which, at the end of the forecast period would fall in the EU to 8.4 million tons from the hefty 9 million tons currently estimated.

The lopsided trend of the two types of wheat, should the production scenario outlined by Brussels materialize, foreshadows a lopsided track on the price side as well, considering, inter alia, that the durum wheat consumption levels expected for 2030 (9 million tons) exceed the effective production capacity of European partners.

It should be noted, again with regards to durum wheat, that EU imports from other countries will continue to grow, reaching 2.2 million tons, compared to the one million and a half indicated by the 2017 preliminary forecast.



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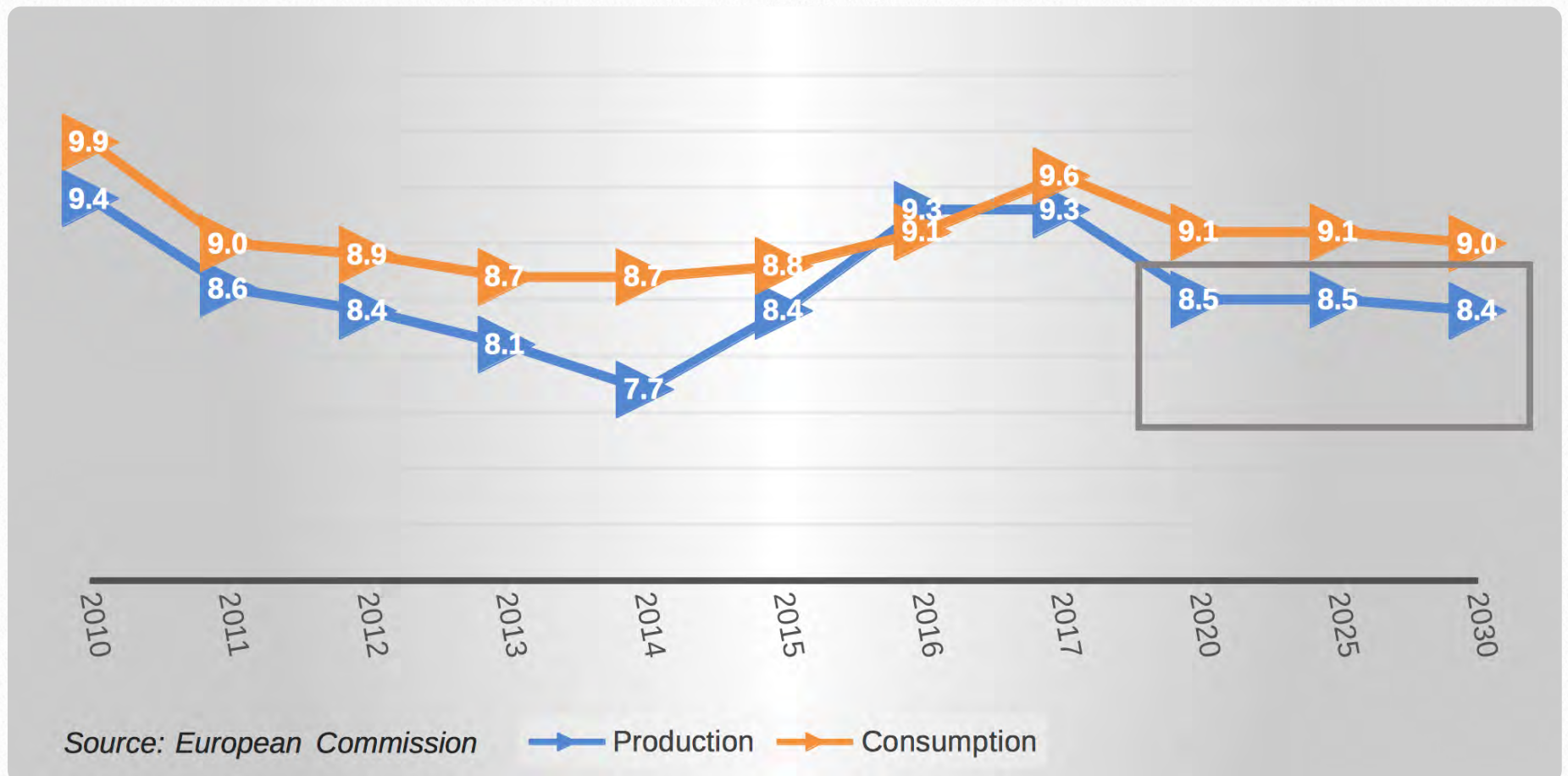


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Chart 1 DURUM WHEAT: FORECASTS FOR PRODUCTION AND CONSUMPTION IN THE EU IN 2030



The forecast – analysts explain – incorporates the loss, by the end of the next decade, of about 400 thousand hectares cultivated with durum wheat, with EU growing areas shrinking from 2.7 million to 2.3 million hectares. As for yields, no substantial improvements are expected in Europe, where growth margins are largely lower than in other areas of the globe.

Returning to prices, the medium-term projection, which, as mentioned, paints a picture of a substantial moderation in the inflationary dynamics of grain commodities, is part of a more accentuated global competition scenario. In particular, Black Sea grain is controlling prices, with Russia taking away market shares in both North Africa and other commercial outlets that are

deemed to be strategic from traditional competitors (France is the country that - more than others - seems to feel the pressure from Moscow), enjoying, among other things, a competitive advantage associated with its currency, which is unfavourable (even prospectively) to the single European currency.



MACCHINE ED IMPIANTI PER PASTA



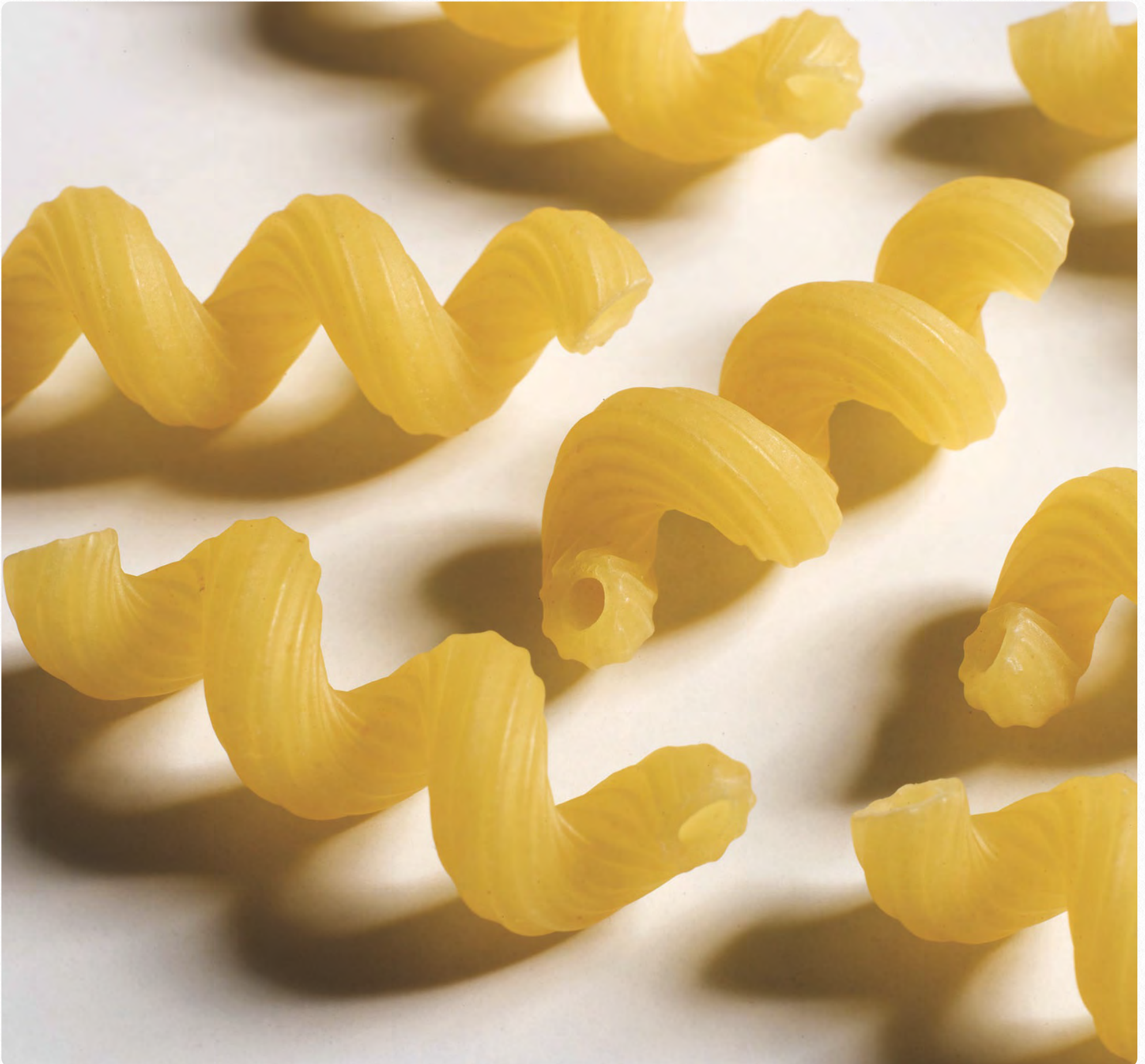
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11

Short news



Editorial staff



Barilla, 200,000 tons of Italian wheat

Over 200,000 tons of Italian durum wheat in two years. This is the purchase agreement between Barilla and farmers in The Marches, Umbria, Tuscany and Lazio. The operation involves 3,000 farms in Central Italy and 20,000 hectares of land. About 80,000 tons (40% of the purchased volume) involve the top-quality varieties Aureo and Svevo whose protein content surpasses 13.5%. The growth in the quality level compared with 2016 will be +1% of protein. Aureo wheat, cultivated without irrigation, replaces the wheat imported from Arizona, a savings of 20 million m3 of water and reduction in CO₂ emissions of 3,500 tons.

Di Martino winner of the “Enogastronomia e Moda” food and fashion award

An award for having contributed to promoting Made in Italy throughout the world. Giuseppe Di Martino, managing director of the Gragnano-based pasta-making company that bears his name, received the “Enogastronomia e Moda” award as part of the Italian Talent Award–ITA promoted by the Italia Talent Association in collaboration with GoodinItaly Web TV and now in its third year. He was awarded for: “Having

given a broad and international profile to the family company, one of the oldest in Gragnano with more than 100 years of experience, but above all for having succeeded in combining tradition, innovation and fashion through its collaboration with designers Dolce&Gabbana who created a special edition of Di Martino pasta.” The D&G pasta was sold online, in the Naples airport and in the London department store, Harrods.

De Cecco, entry in the stock exchange ever closer

Following the April 2016 green light for its entry into the stock market, De Cecco pasta-makers are increasingly closer to being listed on the Italian stock exchange. In light of IPO, a reorganisation plan for the company is being studied, with the entry of outside managers and a new CEO. The outside manager would operate in addition to the three top family managers: Filippo Antonio De Cecco, president, and the two managing directors, Saturnino and Giuseppe Aristide De Cecco. The proceeds from IPO could be used by the group to expand into the United States. Entry into the stock exchange had already been considered in 2008, but then rethought due to the economic crisis. In 2016, De Cecco’s earnings were up 5.7% to 448 million euros.

The banks selected would be Credit Suisse and Unicredit.

Agnesi opens their doors to ICIF students

Open doors for foreign students. The Agnesi pasta-makers welcomed into its plant in Fossano, in the province of Cuneo (Italy), students from ICIF (Italian Culinary Institute for Foreigners), the first school of Italian cuisine for foreigners, founded in 1991. The goal of the partnership signed by the two parties is to foster the pasta culture and knowledge of it through activities promoted by the school. The chefs hail from around the globe: the US, Pakistan, the Philippines, Greece, Nigeria, Korea, Taiwan and Brazil. “The collaboration with this prestigious cooking school,” said Luca Casamatti, director of the Primi Piatti (first course dishes) Business Unit of Colussi, “represents for us an important sign of trust in the quality of our products and the raw materials we utilise.”

La Molisana, earnings up 6-fold

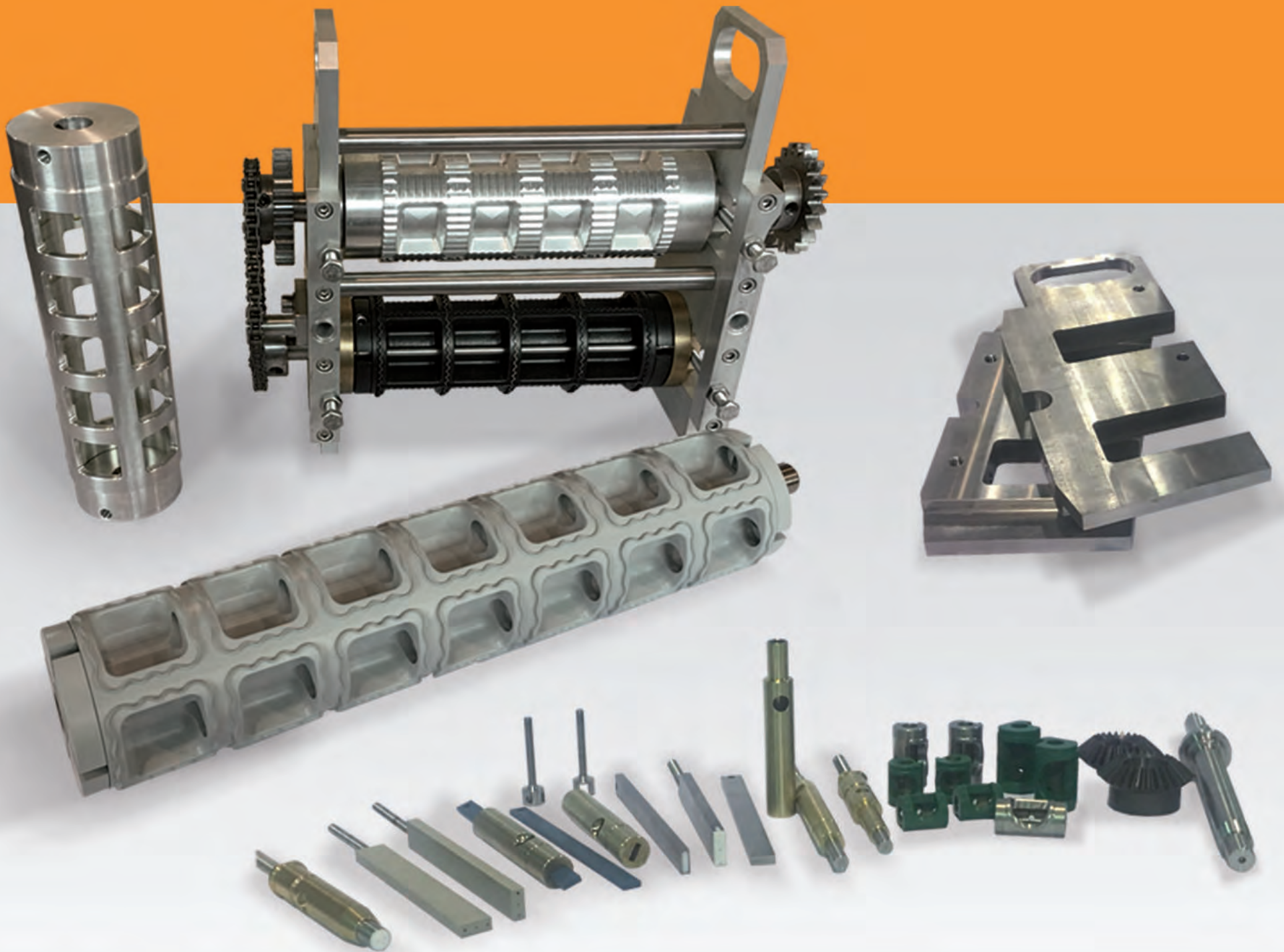
Earnings sextupled in six years. Since its acquisition by the current owner, the Ferro family, the growth trend of the Campobasso (Italy) pasta-makers, La Molisana, has been continuous, with the company

closing the year with earnings of nearly 140 million euros. A full 35% of which is from foreign sales in eighty different countries. The goal for the coming three years, as explained by CEO Giuseppe Ferro to the ANSA press agency, is to reach 200 million euros, above all through growth in international markets. This pasta-maker has recently developed a new recipe that increased the protein level to 14.5%, placing its bets on a new look in packaging. In the future, their intent is to focus on whole-grain pasta and, specifically, a recipe with a fibre content of 7.5%.

Granoro signs the supply chain agreement

The goal is to open dialogue between farmers and producers to their mutual benefit. The supply chain agreement signed by Granoro and the OP producers' organization that is part of Confagricoltura is focussed on fostering dialogue for a unified approach. The agreement, presented to the Italian Chamber of Deputies, brings together 150 producers who are members of a cooperative based in Foggia, and the company whose headquarters is in the heart of Apulia (Italy), in Corato and is one of the leading producers of durum wheat semolina pasta. In the arable lands, grains freely-chosen by the cereal farmers on the

Spare parts and molds for pasta machines



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basis of their needs will be sown, the goal being to provide a level of quality that meets the pasta-maker's requirements. The parameters involve technological-, product- and quality-related aspects (protein, gluten and colour) and contaminants. The market situation will determine the quantity, supply and period (from June 2018 to May 2019). The financial arrangements call for an advance of 200 euros per hectare from Granoro, with the balance to be paid on delivery, with a guaranteed minimum price and bonuses for organic farming methods and higher protein levels. The agreement is designed to be a model for integration and economic and social development of the area that could be replicated in other sectors.

Rummo, wellness programme for employees

A programme to prevent and treat illnesses commonly experienced by employees by focussing on their wellbeing. This is the most recent initiative of the Rummo pasta company in Benevento (Italy) which includes a full-day course dedicated to the prevention of physical and psychological disturbances. The project involves 130 company employees. The course is organized by INAIL and taught by instructors from the head offices of the Prevention,

Prosthetic Rehabilitation Assistance and Central Public Health Office of the INAIL Prosthesis Centre in Vigorso di Budrio (Bologna, Italy). It will examine available treatment for lumbago, lumbosciatica, lumbocrural pain, cervical pain and cervical brachialgia using the approach of the Back, Neck and Bone School.

La Molisana, company medical check-ups

The project is called "*Cura et labora*" and involves a series of check-ups and screening for all employees. It is an initiative of La Molisana pasta-makers in Campobasso (Italy) and is aimed at promoting the health of its employees on the workplace. Thanks to the collaboration of the Fondazione Giovanni Paolo II, it involves in-company screening for tumours and vascular risk. In addition to the medical check-ups, it also includes day-long workshops on healthy eating and proper lifestyles, as well as the creation of a health bulletin board. Eighty employees are involved in the programme. "Promoting the wellbeing of employees helps to improve their productivity and, at the same time, the company also becomes a place where people can take care of themselves," said Rossella Ferro, head of marketing for the company.

Barilla, osteopathy joins the company

Three osteopaths in the company. To treat 450 employees and assess the effects of osteopathy on workers. This is the project already implemented in Barilla through CIO, Collegio Italiano Osteopatia in Parma (Italy). The goal of the initiative is to utilize osteopathic treatment to reduce absenteeism due to illness, as well as improve the physical resistance of employees to stress. The other objective is to reduce the number of requests for specialist medical care and reduce the use of drugs by employees, given that the typical approach of osteopathy is to prevent, and not simply treat an illness. The treatments and data-gathering, which began at the end of November, will continue until April 2018.


Pastificio Mosconi, enters the fresh pasta market

Luciana Mosconi pasta factory makes its debut in the fresh pasta market. This is the challenge from the leading company in the premium dry egg pasta sector which has opened a second plant in Ancona (Italy) for the production of fresh pasta made from 100% Italian durum wheat and eggs. The fillings are prepared using meat selected from Italian breeders, prosciutto from Parma and The Marches, top-quality


mortadella, Parmesan cheese aged 22-24 months, ricotta from Altopiano di Colfiorito (Italy) and fresh spinach, without the use of breadcrumbs, artificial flavourings or glutamate. The new plant also has a retail outlet where the company's products can be purchased.

Divella - Coldiretti - Consorzio: price of durum wheat set


A quality approach to bring to the table 100% made in Apulia pasta. This is the goal of the agreement drawn up between Divella pasta-makers, the Apulia section of Coldiretti and the Consorzio Agrario del Centro Sud that sets the minimum price of durum wheat at 28 euros per 100 kg. The agreement, which provides for an initial delivery of 30,000 tons of durum wheat from Foggia and Bari (Italy), also includes a bonus for grain whose protein content is higher than 14.5% and an increase in the purchase price in the event the market price rises. In the province of Foggia alone, the surface area dedicated to wheat cultivation is 240,000 hectares, with an average durum wheat yield of 720,000,000 kg. A preliminary agreement was put into effect for the last cereal season, with an official price, on average, of 30 euros/100 kg.




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Pastificio Giglio, prison initiative

An agreement has been signed between Giglio pasta-makers and ten inmates of the Ucciardone prison in Palermo (Italy). Located within the facility will be a small pasta-making unit for the production of slow-dried pasta. This small, independent company will produce about 100 kg/hour of dry pasta in a range of shapes and types: using whole-grain semolina, Sicilian durum wheat or stone-ground semolina from local wheat varieties. The initiative is called Giglio Lab, an experimental social, cultural and educational laboratory, and not just one involving food production and methods. The pasta will bear the “Ucciardone” brand of the prison that will also be used for other initiatives.

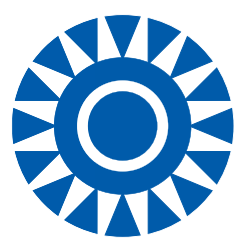
Pasta in 3D: new look for the fusillo shape a winner

The new *fusillo* is a winner. A sort of oval-shaped spiral conceived by Italian Andreas Anedda. This is the result of the Barilla “Smart Pasta” competition for designers from around the world. The concept was to award new pasta shapes with unusual designs to be created using the 3D pasta printer that was presented by the Parma-based company during the 2016 CIBUS trade fair. Anedda won against 680 interna-

tional designers who were predominantly Italian, but also American (14.1%) and Mexican (13.7%). Numerous universities took part, including the New School of New York, Purdue University, Savannah College of Art and Design, UDEM and De La Salle – College of Saint Benilde.

Filotea, italian organic goji pasta

Filotea, the pasta-making company based in The Marches and famous for the high quality of its artisan pasta in designer packaging, has launched its organic Italian goji egg pasta. The new product was tested in its Ancona (Italy) plant by adding puréed goji to the pasta dough to create a product with an intense colour and flavour, with ORAC values (used to measure the antioxidant properties of food products) of over 5,000 per 100 grams of pasta. This specialty pasta was unveiled in December at The Pasta Experience Store in Turin (Italy). “In the store,” reports Pietro Giugliarelli, owner of Filotea, “we wanted to offer a new approach to pasta that would be a total experience for consumers and pasta lovers, as well as sector professionals.”



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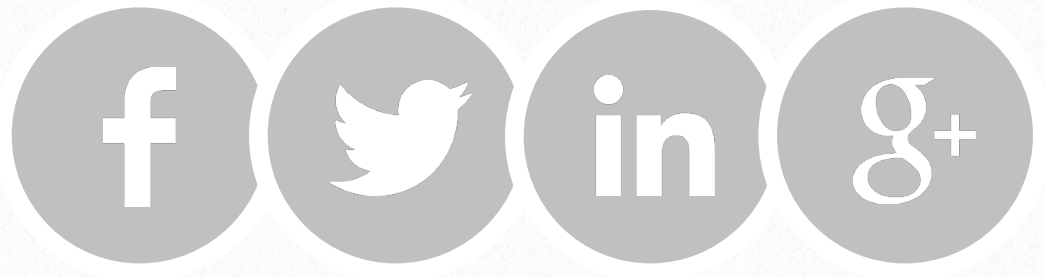
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12



Gluten Free Expo & Lactose Free Expo

Press release

2017: positive results for the international meeting point for gluten free and lactose free sectors



The sixth edition of Gluten Free Expo and the first edition of Lactose Free Expo, both finished yesterday at Rimini Business Space under the auspices of Italian Exhibition Group, obtained a positive result.

The two fairs, organized by Exmedia – a company of IEG – dedicated to gluten free and lactose free products, respectively, confirm themselves as the only and privileged meeting point not only for the Italian market but also and above all for the international one.

For Lorenzo Cagnoni, IEG President, “Quality and innovation, supported by the dimensions, are the best evidence of the value of these two fairs. These exhibition have a growth prospects and development, thanks to the interest confirmed by the consumers and professionals. “

This edition has obtained a growth of 15% of exhibition area. 243 brands, and also some multinational corporations, attended the 2017 edition of Gluten Free Expo and Lactose Free Expo. More over there were a lot of foreign companies from France, UK, Spain, Germany, Czech Republic, Denmark, Holland, Belgium, Norway, Romania, Greenland, Peru, Pakistan, Malaysia and Korea, (from which a large group of The Korea Rice Foodstuffs Association have participated).

The incoming program for foreign buyers has been strengthened thanks to the support of ICE – Agency for the Promotion and internationalization for Italian Companies, that gave its support to the fairs for the first time.





There were 480 business meetings organized with buyers invited by the incoming program from France, Spain, Germany, United Kingdom, Austria, Denmark, Poland, Finland, Slovenia, Ukraine, UAE and Russia. From Russia, the president of The Russian Guild of Bakery and Confectioners visited the exhibitions with a delegation of bakery companies. Thanks to this cooperation, the Organizers have already planned some initiatives for next editions.

150 events, such as market data presentations, training courses, workshops and show cooking, have actively involved professionals during the fairs.

Finally, said Juri Piceni, CEO of Exmedia, “the exhibitions confirm themselves as global reference for the gluten free and lactose free market, that are a young and very dynamic sectors and have a great potential development to catch the interest of professional and international audience. “ Save the date: next edition of Gluten Free Expo and Lactose Free Expo will be held from 17th to 20th November 2018 at Rimini Business Space.



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