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The professional information network magazine for pasta manufacturers

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2019

Colophon

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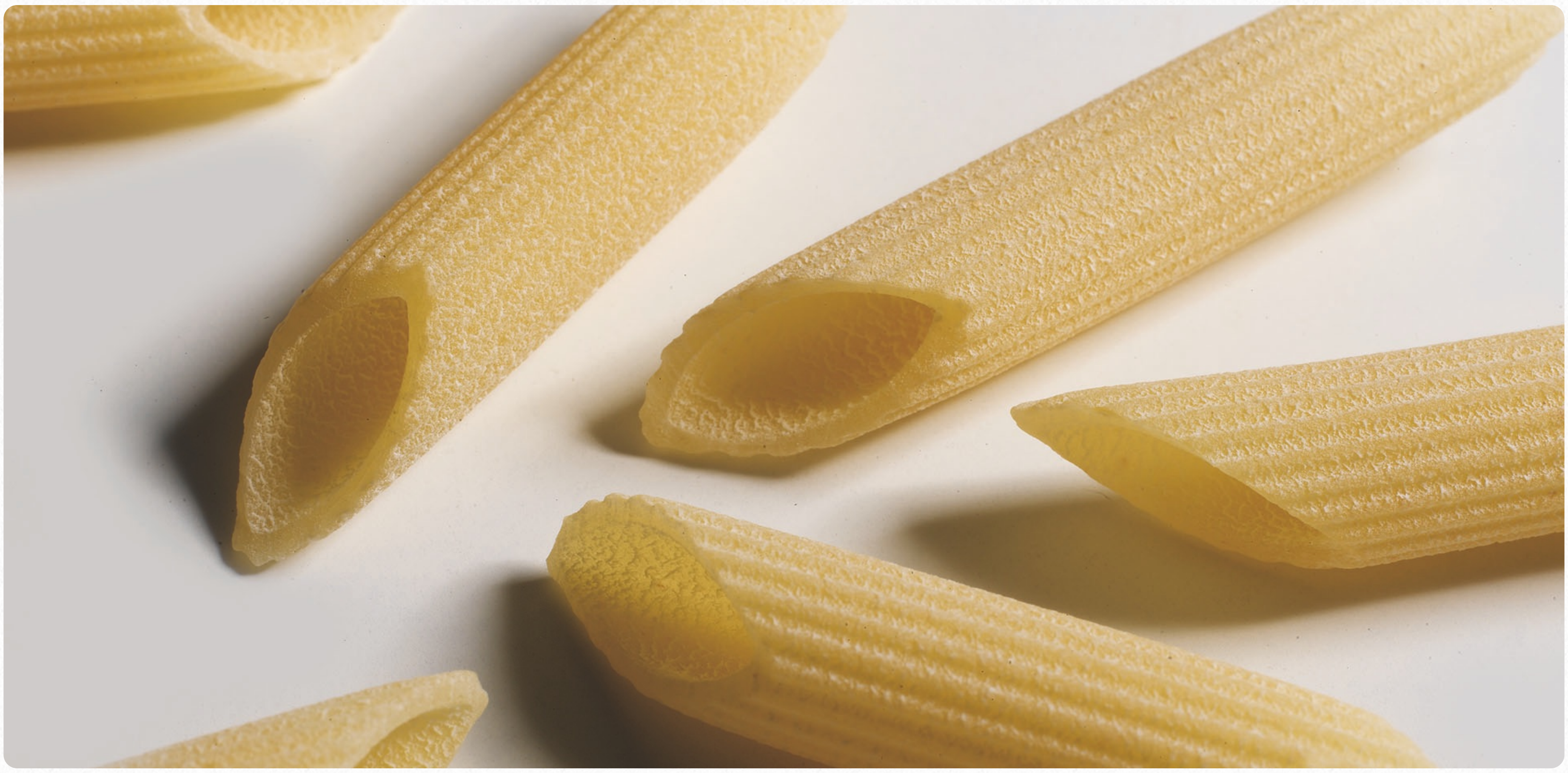

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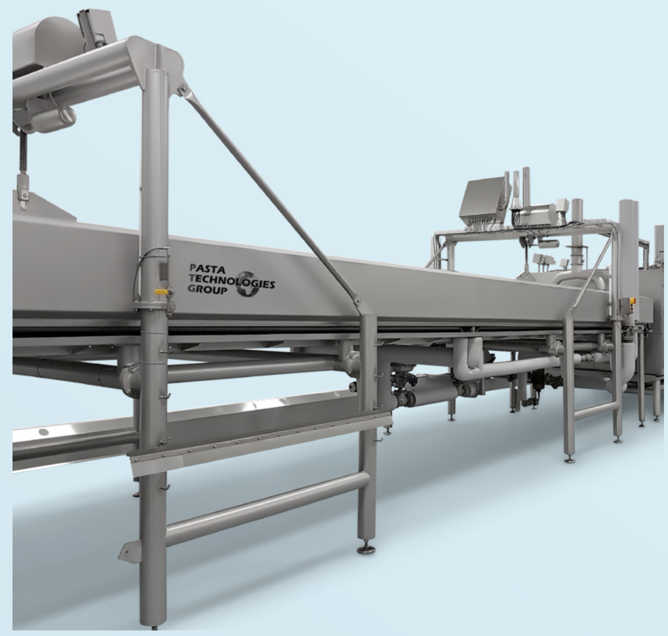

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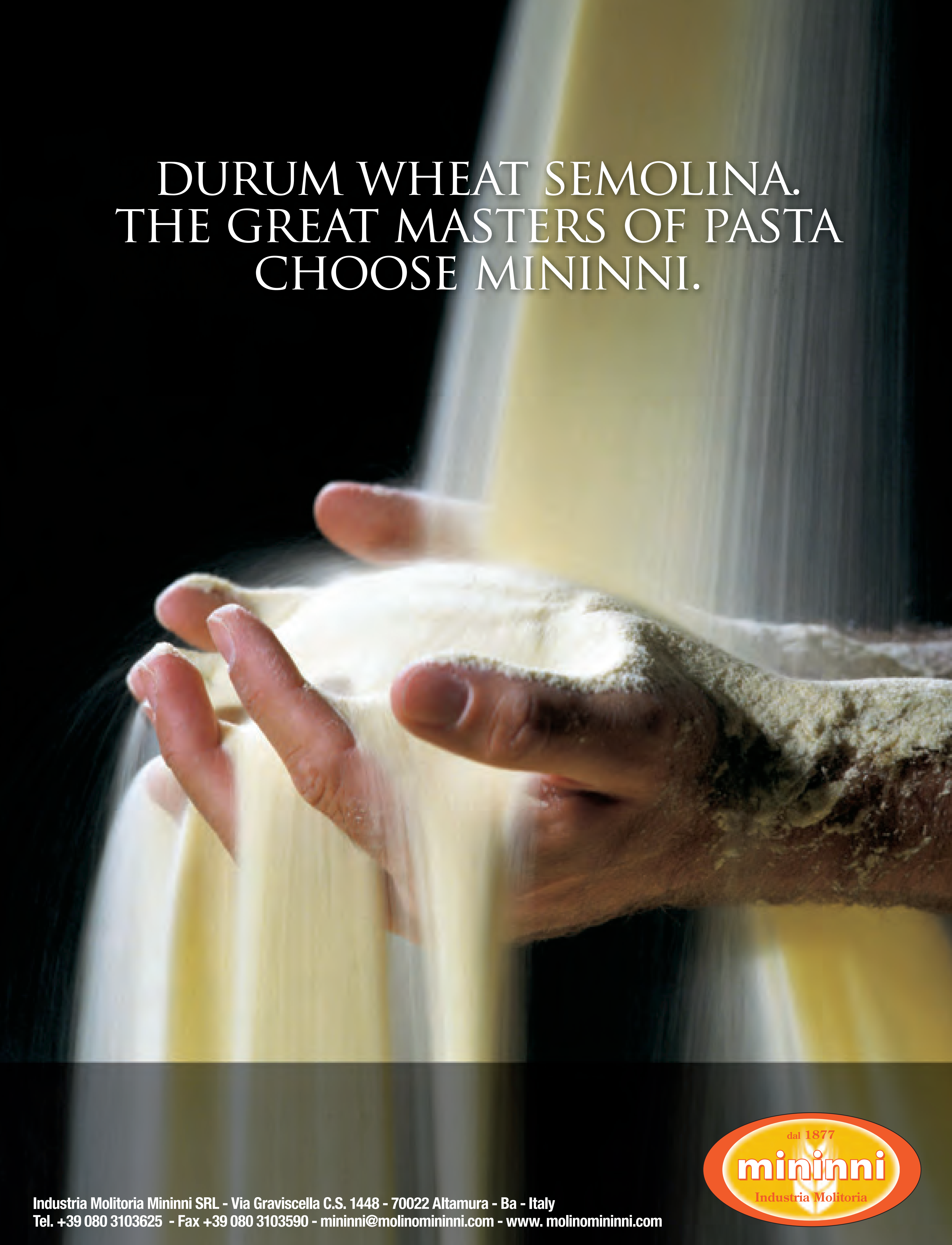
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1

Proceedings of the Pastaria Festival 2018. Thermostable resistant starches: new ingredients amid technology and nutrition

Gianluca Giuberti
Department of Food Science & Technology for a Sustainable agrifood supply chain (DiSTAS)
Università Cattolica del Sacro Cuore, Piacenza

The study was presented during the conference entitled *Pasta: innovative ingredients, health and nutrition* organised as part of the 2018 edition of Pastaria Festival.

It is well-known that the susceptibility of starch to enzyme attack depends on its chemical/physical structure, on the type of heat treatment to which it is subjected and on a series of interactions between these factors. In the field of nutrition, this susceptibility is generally classified by being divided into fractions of rapidly digestible starch (RDS), slowly digestible starch (SDS) and resistant starch (RS) (Magallanes-Cruz et al., 2017). In particular, the RS fraction has been defined as "the sum of starch and products of starch degradation not absorbed in the small intestine of healthy individuals, but fermented in the distal sections of the intestine" (Raigond et al., 2015). As underlined in a Scientific Opinion issued by the European Food Safety Authority (EFSA, 2011), foods rich in RS (at least 14% of the total starch) can promote hypoglycemic effects and act as a functional substrate for the selective growth of microorganisms of the gut microbiota known to be beneficial for human health. Additionally, thanks to its physiological properties, the RS fraction, considered a "functional fibre" has been included, since 2001 in the definition of dietary fibre (Raigond et al., 2015).

As a general rule, the majority of commonly used starchy foods contain a portion of RS, but in very variable quantities, ranging from maximum values of over 15-20% of total starch for legumes to values close to 2-4% of total starch for durum wheat pasta and for the main oven-baked products. Moreover, great similarity is reported in the bibliographical references between wholewheat foods and their refined flour counterparts (Magallanes-Cruz et al., 2017).

Starting from these assumptions, and considering the functional role of this fraction, one of the most common approaches used for the creation of foodstuffs containing a high percentage of RS is based on the selection of ingredients with a high nominal content of resistant starch, derived from cereals having distinctive characteristics in terms of starch chemistry (chiefly with a high amylose content), from legumes and/or native starches. It is, however, important to clarify one point. By definition, the RS fraction is, in turn, divided into 4 sub-categories: RS1 (physically inaccessible starch), RS2 (native granular starch), RS3 (retrograded starch) and RS4 (chemically

modified starch). Very often sector operators, who focus mainly on research into native (raw) flours, only consider the RS2 fraction. However, if the final aim is to create a functional foodstuff rich in RS, this choice is not competitive, since the RS2 fraction is almost totally lost (up to values of almost 80%) following the heat treatment (cooking) to which the food has to be subjected (Haralampu, 2000). In fact, during the process of gelatinisation of starch during cooking, the RS2 fraction is converted into starch available for enzyme attack (Thompson, 2000).

An innovative approach is based, on the other hand, on the use in recipes of ingredients with a high content of RS3 (retrograded resistant starch). We have seen how the process of cooking starch in adequate volumes of water contributes significantly to increasing its degree of gelatinisation and its digestibility. However, with cooling, the gelatinised starch undergoes a phenomenon called retrogradation, leading to the creation of crystalline regions poorly accessible to enzymatic hydrolysis. In other words, in order to maximise the RS content of our foodstuff, we have to subject the native ingredient source of RS2 to a series of technological processes based on the use of effective time/temperature/moisture diagrams in order to convert the RS2 fraction (unstable during cooking) into RS3 (stable). This means that we have to exploit the process of gelatinisation and retrogradation to our advantage, controlling and optimizing the various process parameters in order to create RS3 resistant starch directly in our ingredient, prior to its use in formulation. RS3 starch has greater thermostability than the RS2 fraction (approx. 4-5 times higher) and therefore guarantees the same amount of RS in the finished products obtainable only with higher quantities of native ingredients containing RS2. Moreover, similarly to RS2 resistant starches, their RS3 counterparts are flavourless, usually white, and if appropriately added to formulations, they do not give rise to technical or sensory problems (Giuberti and Gallo, 2018).

In order to generate RS3 from native sources (RS2), the most commonly used technological processes include, but are not limited to, hydrothermal treatments, the application of heating-cooling cycles and/or enzyme-catalyzed changes. These procedures guarantee irreversible changes in the structure of the native starch, contributing, not only to optimizing the thermostability of the resistant fraction, but also to increasing its portion, thanks to the formation of retrograded starch structures packed between them and to the higher resistance (Hoover, 2010; Pratiwi et al., 2018). In particular, hydro-thermal treat-

ments are procedural patterns during which low levels of moisture (< 35 %) and high temperatures (90-120 °C) are employed, while the procedures defined as "annealing" refer to treatments conducted with higher levels of moisture but with the use of lower temperatures, usually lower than those required for gelatinisation (Hoover, 2010). Additionally, partial enzymatic hydrolysis can contribute to the formation of RS3, thanks to the creation of highly mobile short linear chains that can contribute to the formation of portions of RS3 through interconnected processes of rearrangement and recrystallisation of the starch during cooling (Thompson, 2000). Although these procedural schemes used to convert RS2 into RS3 are based on the application of appropriate heating/cooling cycles (time/temperature diagrams) in the presence of adequate volumes of water, various indications suggest how the response to treatment data could be substrate-dependent. In other words, each type of starch, characterised by distinct physical/chemical properties (amylose/amylopectin ratio, shape and size of starch granules, different distribution of amorphous and crystalline areas etc.) will have a different response, in terms of generating RS3 and the thermostability of the fraction created) if subjected to the same type of treatment.

Starting out from these assumptions, at DiSTAS (Department of Food Science & Technology for a Sustainable agrifood supply chain) in the Faculty of Agricultural, Food and Environmental Sciences of the Università Cattolica del Sacro Cuore (Piacenza, Italy), a series of experimental tests is being conducted for the purpose of evaluating these treatments on various starch matrices in order to create functional ingredients rich in RS3. Up till now, 4 distinct sources of native starch have been tested (high amylose corn starch, rice starch, sorghum starch, soft wheat starch) modified through hydrothermal treatments (at different levels of temperature, moisture and process times), enzymatic hydrolysis catalysed by de-branching enzymes at different concentrations (pullulanase) and/or a series of heating cycles in autoclave followed by cooling in optimised conditions. All the ingredients obtained (both in native form and after the application of the treatments) were evaluated in terms of final content of RS and in function of the stability of this fraction (in terms of amount of RS retained) in the subsequent heat treatment (cooking in boiling water).

The data collected indicate that the various treatments proved to be effective for the purpose of increasing the amount of starch quantified as the RS fraction. In particular, increases of approx. 25%, 50%, Dies and inserts for pasta production

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30% and 60% were obtained comparing the content of RS in high amylose corn starch, rice starch, sorghum starch and soft wheat starch, before and after the application of different treatments, respectively. From the data, moreover, it can be deduced (in line with the bibliographic data available so far on the subject) that the thermostability of the RS fraction of the native ingredients is markedly lower (thermostability RS2 < 20 %) compared to the values recorded by the counterparts subjected to specific treatments (thermostability RS3 > 70 %). In any case, both the thermostability values and the relative values of RS proved to be substrate-dependent, in function of the native characteristics of the starches used at the outset. Optimising the various process parameters (time/temperature/moisture) in function of the chemistry of the starch is, therefore, of crucial importance. Additionally, at the same laboratories, evaluations are being carried out to estab-


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lish whether these procedural schemes can be applied to other matrices (barley, pseudocereals and legumes, for example), either in the form of pure starches or directly in flours or whole grains.
Verifying the applicability in business of such technological processes, the costs connected with their implementation, and the planning of the correct set-up in terms of machinery and process conditions could present a new, pursuable path of scientific research and development aimed at widening the range of value-added functional ingredients and products.

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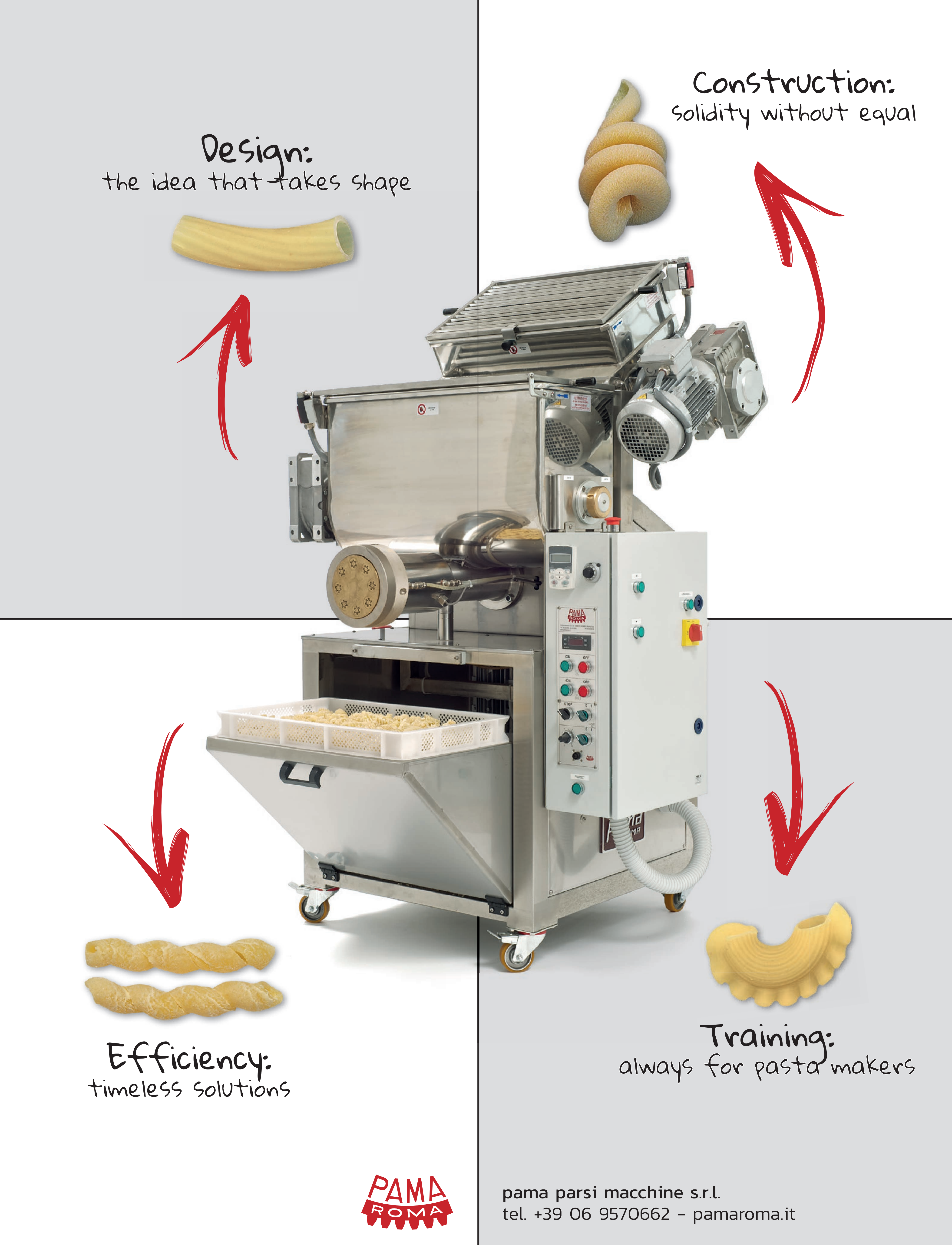
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Commodity price observatory 1/2019

Centro studi economici Pastaria

Pastaria's four-monthly feature on the prices of the main raw materials used by pasta manufacturers.

The slump in oil prices has imposed generalised reductions in the list prices of the main industrial commodities, although this has had a fairly minor impact on the production costs of manufactured goods until now.
After the collapse of the stock market at the end of the year and the rush to purchase safe-haven assets (mainly gold, other precious metals and reserved currencies), 2019 has begun with a maxi-rebound of the indices on the main financial markets, but the general sentiment is still affected by the negative forecasts on the developments of the world economic cycle, associated with uncertainties regarding the evolution of international trade and the sudden deceleration of Chinese growth.
In Europe, the main risk factors can be traced to the standstill of industrial production in Germany and to the concrete possibility of a hard Brexit, with the risk of Britain leaving the EU without reaching an agreement with Brussels (the so-called “no deal” scenario) which contributes to creating an extremely uncertain state of affairs.
Against this backdrop, agricultural and food commodities are still moving haphazardly, albeit with a predominant tendency towards reduction. And looking ahead - according to the analysts – share prices will be further affected by the predictable weakening of Chinese demand and by a further adjustment of the crosses between currencies, with the strengthening of the US dollar which will tend to favour the low cost exports of the emerging countries.
World Bank forecasts are oriented towards a moderate rise in soft commodity prices in this year’s budget.
A forecast that incorporates an inflationary dynamic of the energy component which does not seem however to have materialised yet, after the drastic fall in crude oil prices experienced in the last quarter of 2018.
The current situation of the food sector commodities, which shows an overall loss of almost 4 percentage points year on year, reflects a rather complex picture, with cereals - rice excluded - still marked by an upward trend, thanks first and foremost to the positive dynamic of wheat, which makes a year on year progression of 13%.
With specific reference to the pasta industry, no substantial imbalances have emerged in a market that has not experienced problems in obtaining semolina and products in kernels, manifesting, in contrast, the implications of increasing competitive pressure between international players, which is still keeping a tight rein on durum wheat share prices.
For Canada, the largest world exporter, December forecasts for 2018/19 predict a rise in production of 16% (5.7 million tons), while at a global level the durum wheat harvest, according to the evaluations of the Interna-

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PRICES AND TRENDS OF CERTAIN FOOD RAW MATERIALS (DECEMBER 2018)				
National fine common wheat	Price (€/ton)	Monthly variation	Annual variation	Forecast
	224	2.3%	16.7%	=
Fine durum wheat from central Italy	Price (€/ton)	Monthly variation	Annual variation	Forecast
	218.5	2.1%	-2.4%	=
00 type common wheat flour	Price (€/ton)	Monthly variation	Annual variation	Forecast
	410	1.2%	n.a.	=
Semolina above min. leg. req.	Price (€/ton)	Monthly variation	Annual variation	Forecast
	417.5	0.9%	-2.3%	=
Eggs M	Price (€/100 pcs)	Monthly variation	Annual variation	Forecast
	10.6	-19.7%	-29.8%	▲
Pork hams for Prosciutto 12 kg and over	Price (€/kg)	Monthly variation	Annual variation	Forecast
	3.2	n.a.	-21.2%	▲
Beef – veal meat half-carcass, prime quality	Price (€/kg)	Monthly variation	Annual variation	Forecast
	4.88	1.9%	-4.1%	=
Raw milk	Price (€/100 kg)	Monthly variation	Annual variation	Forecast
	45.82	-1.7%	151%	▼
Churned butter	Price (€/kg)	Monthly variation	Annual variation	Forecast
	2.3	-7.3%	-20.1%	▲
Grana Padano aged for 9 months or more	Price (€/kg)	Monthly variation	Annual variation	Forecast
	7.2	5.7%	11.5%	▼
Extra virgin olive oil	Price (€/kg)	Monthly variation	Annual variation	Forecast
	5.3	2.9%	27.7%	▼

Source: Centro Studi Economici Pastaria elaboration based on various data sources. Grain, flours and semolina: Granaria, Bologna; Eggs: CCIAA, Forlì; Pork and beef: Commodity Exchange, Modena; Milk: CCIAA, Lodi; Butter and Grana Padano: Commodity Market, Milan; Olive oil: CCIAA, Bari.

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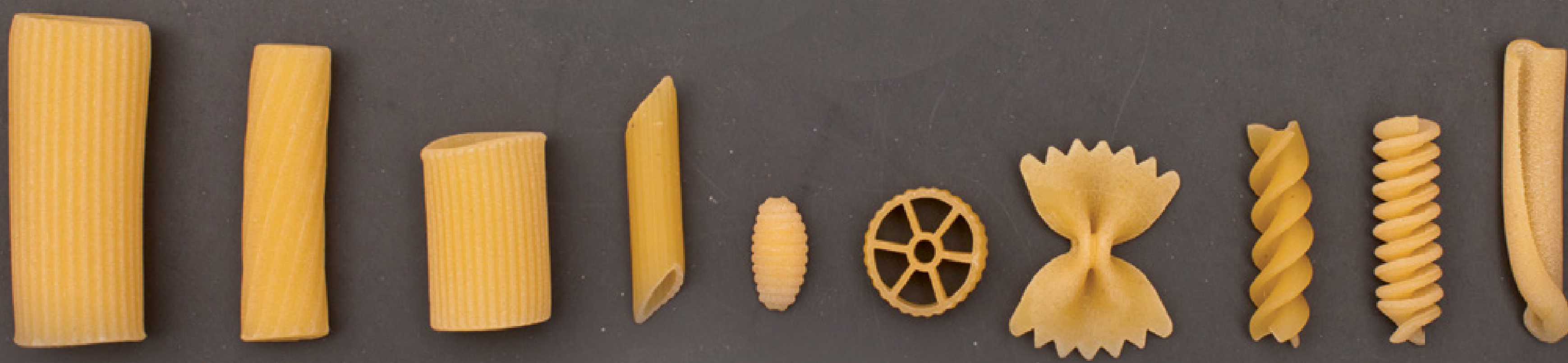

11
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PRICE MONITORING				
IMF Commodity Food Price Index	Price (2005=100)	Monthly variation	Annual variation	Forecast
	84.89	-1.6%	-4.8%	=
Soft Red Winter FOB Gulf of Mexico	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	210.85	0.8%	20%	▼
Mais, U.S. No. 2 Yellow FOB Gulf of Mexico	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	160.69	0.3%	8.1%	▼
IMF Index, Soft Red Winter, Mais: November 2018				

tional Grains Council, has allegedly reached 38 million tons, a year on year growth rate of almost 3 percentage points.

There should be a drop in the price of Canadian durum wheat with 13% protein from 265 dollars per ton to 245 dollars per ton ex-works, on average, during the 2018/19 season, with the current values (slightly under 220 dollars/ton) showing a negative year on year gap of 18%. In Italy, prices range from around 225 to 240 euro per ton, depending on the market, showing, on average, a slight drop compared to the previous year.

Cereals apart, for the other raw materials in the food sector the final balance data calculated by the FAO analysts, show an overall negative balance in 2018. The Food price index, the summary indicator of world prices for agrifood commodities shows a year on year drop of 3.5%, confirmed by the statistics of the International Monetary Fund.

To the 9% revaluation of cereal prices, there have been on average over the last twelve months particularly sharp drops in the prices of vegetable oils (-14.7%) and sugar (-21.9%). A minus sign in 2018 also for meat and dairy products, with reductions of 2.2 and 4.6 percent, respectively, compared to 2017.

Olive oil proves to be an exception to the rule, moving in Italy in marked contrast to the trend of the other vegetable oils. For extra virgin olive oils, current values have greatly exceeded the threshold of 5 euro per kilo, with a year on year rise of almost 30%. This upward trend is likely to continue over the next few months, after one of the worst production results of the last few decades. The prices of Spanish oils are moving in the opposite direction, with Madrid being able to benefit from a satisfactory and more plentiful production result than the previous year.

3

Proceedings of the Pastaria Festival 2018. The opportunities and pitfalls deriving from the rules governing PDO and PGI

Nazario Malandrino

Nazario Malandrino's address to the conference entitled *Typicality and territory as a tool for enhancing the small and medium sized fresh pasta enterprises*, organised by APPAFRE as part of Pastaria Festival 2018.

More than twenty-five years have now passed since the enactment of EEC Regulation 2081/92 relating to the protection of geographical indications and designations of origin of farming and food products. Over this period the renown of PDO and PGI products has undoubtedly increased, attracting great appreciation from consumers. There is a widely held belief among those working in the field that they represent an important resource not only for the individual countries holding such recognition but for the European Union as a whole.

The success of PDO and PGI products confirms the public's interest in foodstuffs which have special quality characteristics linked to their origins.

What this trend confirms in effect, is the increasing conviction according to which the quality of some food products is connected with their geographical environment (climate, fauna, flora, soil and sea) and to human factors (production and processing techniques) as demonstrated by an extensive bibliographical literature.

On this latter point one only needs to think of the 4th century BC Ancient Greek gastronome and poet, Archestratus of Gela with his work on the pleasures of the table, *Hedypatheia*. In addition to providing suggestions on how to organise a banquet, he also recommended a number of places where it was possible to taste the highest quality fish. It seems that, in order to write his poem this chef *ante litteram* had travelled throughout the then-known world to taste first hand the food referred to in his book in the places where it was produced. This widespread opinion has stimulated many countries throughout the world to issue specific rules on the origin of goods. In more recent times we find traces of rules on the origin of goods in the *ius mercatorum* and in particular, in the mercantile Statutes and subsequently in various international treaties and conventions.

It is also interesting to note how, as early as the 1883 Paris Convention concerned with the protection of industrial property, signed by 170 countries, the adoption of safeguarding measures in the form of seizure by customs authorities was already envisaged in the case of the direct or indirect use of a false indication in relation to a product's origin. For example, the display of the image of a particular country's flag or of historic buildings on a label denoting a place or country which was not the product's place of origin, was enough to trigger the application of such a measure.

These are principles still used and applied today by the current control authorities.

The intuition of the 1992 community legislators to regulate quality products was undoubtedly perspicacious. In effect, pres-

sure to enact laws providing effective regulation and protection for protected designations of origin and geographical indications had been building up from a number of different parties.

At that time it had been observed that consumers tended to prefer quality over quantity in what they ate and their research tended to be directed towards farming or food produce with a specific geographical origin. Furthermore, demand was growing. The need thus arose to help consumers to make their decisions by the provision of truthful, clear and succinct information precisely giving details on the local origin of such products. Indeed, there was a multitude of products on the market displaying a flood of information. This took the form of promotional messages which were essentially self-serving in that there was no guarantee of the truth of their contents.

It was thus a matter of importance to create rules allowing consumers the appropriate information on which to base their choices in the best possible way.

During the 1980s a number of Member States had also enacted their own laws protecting the quality of some product types such as, for example, the recognition of the "Controlled Designation of Origin", a concept which became fairly widespread, being much prized by producers. Indeed, while food sector operators' adhesion to protected production cycles on the one hand entailed greater commitment including costs, on the other it led to increased earnings, compensating for the additional efforts made to achieve quality.

Undoubtedly there was a risk that the national initiatives in the establishment and assignment of designations of origin and geographical indications would lead to the creation of national laws with conflicting content within the Community market.

It thus appeared necessary to draw up a legal framework applying to all Community Member States in this field able to ensure an adequate protection regime and guarantee equal competitive conditions for all producers of food products showing the related quality marking.

It was no accident that the Community legislators chose the "Regulation" as the legislative instrument to govern a matter of such sensitiveness, directly enforceable in all European Union Member States once enacted. In effect, it was realised even in 1992 that the related rules were destined to increase the credibility of the products concerned in the eyes of the consumer.

Subsequently, having fulfilled its function with distinction for almost fifteen years, EEC Regulation 1182/92 was repealed and replaced by EC Regulation 510/2006 making the procedure for the recognition of geographical indications more streamlined

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with a shortening of the time allowed for oppositions and greater co-ordination between national and community institutions. The changes in the recognition procedures were also made necessary by the sheer number of applications by the interested associations and the European Union's delays in registrations.
Under the subsequent EU Regulation 1151/2012 there was a consolidation of the rules governing quality products, bringing together the new or updated provisions of EC Regulation 510/2006 mentioned above and EC Regulation 509/2006 regulating traditional and guaranteed specialities.
EU Regulation 1151/2012 introduced a second order of provisions governing quality regimes concentrating on the wording giving added value to products: "the optional quality terms".
In substance, it established a regime relating to special optional quality terms used to assist in the communication by producers of the characteristics and properties of agricultural produce. More specifically, optional quality terms refer to a characteristic of one or more product categories or to a manner of agricultural production or processing applicable to specific areas. The use of the term confers value to the product with respect to other products of a similar type and has a European dimension. Articles 31 and 32 of EU Regulation 1151/2012 govern the optional terms "mountain product" and "product of island farming". Like geographical designations and indications, optional quality terms communicate the existence of a connection between the product and its environment.
Returning to the issue of interest here, it should be noted that PDO and PGI products have a significant role in the defence of cultural heritage, traditional production methods and the natural resources of the Member States, representing a significant resource for the European Union's entire economy.
The strong points deriving from producers' membership of the quality regimes are clear. They increase the value of the product, encourage fair competition between producers, guarantee the provision of correct information to consumers and stimulate exports.
While it is undoubtedly true that the rules governing quality products provide many advantages and opportunities, it should also be noted how they represent a potential pitfall for operators in the food sector.
For example, the use of geographical references on food product labels in breach of the laws enacted to protect quality products may foreshadow the arrival of difficulties of not insignificant dimensions.
Of the different regulations that need to be highlighted, Legislative Decree 297/2004 is

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undoubtedly of particular importance in this context, containing penalising provisions in application of EC Regulation 2081/92. The Decree poses not inconsiderable difficulties in its interpretation and sets up procedures and penalties intended to defend PDO and PGI products.
Of the various theoretical cases attracting penalties set out in the Decree, the following are worthy of notice:

- the illegitimate use, whether directly or indirectly, of a protected designation or indication or its registered distinctive marking or trademark;
- the modification of a protected designation or indication or its distinctive marking or trademark for sale and marketing of products or their release to consumers;
- the usurpation, imitation or evocation of a protected designation or indication, its distinctive marking or trademark, in the designation and presentation of the product.

Another provision of particular interest, it too designed to protect PDO and PGI products, is Article 517 *quater* of the Italian Penal Code entitled “counterfeiting of the geographical indication or designation of origin of food and farming products”. The provision in question imposes punishment on anyone guilty of counterfeiting or in any case altering geographical indications or designations of origin of food and farming products and who, in order to profit from the same, brings such products into Italian territory, holds them for sale, puts them on direct sale to consumers or in any case releases such products into circulation with such counterfeited indications or designations.
One of the most frequent of the administrative proceedings initiated by the control body is in the area of compound foods where PDO or PGI products are ingredients, the producer then displaying their presence on the label outside the list of ingredients without, however, having requested the necessary authorisation from the reference consortia or the Ministry of Farming, Food and Forestry.
Article 1, paragraph 1, letter c) of Legislative Decree 297/2004 states as follows: “Anyone who uses a protected designation, its registered distinctive marking or brand, whether directly or indirectly, on a commercial basis, will be subject to the administrative penalties indicated below: [...]; c) A monetary administrative penalty will be imposed for compound, transformed or processed products displaying a reference to one or more protected designations on their labelling, presentation or advertising, of between € 2,500 and € 16,000. Reference to the protected designation will not be covered by this letter:

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1) when the users of the compound, transformed or processed food have been authorised by the consortium set up to defend the recognised protected designation [...];
2) or when the reference to the protected designation is only set out as one of the ingredients of the packaged food which contains it or in which it is transformed or processed".

Many food sector operators have been charged with breach of this provision who, in complete good faith, while effectively having used PDO or PGI products ingredients in the mixed food product, have found themselves subjected to administrative penalties either for failing to request authorisation in advance from the reference consortium or by indicating the designation or indication of origin of such ingredients outside the list of ingredients.

Thus, if they have not requested such authorisation, food sector operators who use PDO or PGI ingredients in their compound foods may only refer to the presence of such products in the special list of ingredients, avoiding mention on other parts of the labels or in the presentation and advertising for the food.

Indeed, with reference to the mention of the ingredients on the label, we would note the fairly widespread but nonetheless wrongful practice of following an ingredient in the list by geographical references or adjectives not forming part of the ingredient's sale designation but which in actual fact represent a promotional message. The control body has imposed penalties as a consequence of such practices particularly in cases it considered were capable of misleading the consumer by the evocation of protected geographical designations or indications.

For example, if a compound product uses red onions and such ingredient is described in the list of ingredients followed by the adjective "*calabrese*", (Calabrian), the control body might consider that this represents a breach of Article 7 of EU Regulation 1169/2011 in that the adjective "*calabrese*" tends to evoke the geographical indication "*cipolla rossa di Tropea Calabria IGP*" (PGI red onion from Tropea Calabria). The use of the geographical term is thus capable of misleading potential consumers who might be induced to think that it is precisely the PGI product which has been used in the compound food.

Without prejudice to the fact that promotional messages must be truthful, demonstrable and expressed in compliance with the reference law (see for example, Article 7, Information fair practice) the fact is, not something to be underestimated, that if they express geographical references or

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suggestions making associations with quality products, this may be particularly risky. Operators should thus be advised against using a form of wording or nouns on labels which recall or evoke quality products. Officials from the Ministry of Food, Farming and Forestry charged a producer with the breach of Article 7 of EU Regulation 1169/2011 with the imposition of the related penalties defined by Article 3 of Legislative Decree 231/2017, on the grounds that the description on a food label of a pasta stated it was "*pasta doc*", (CDO pasta), suggesting that the pasta met particular characteristics whereas in reality all pasta made from durum wheat flour is required to comply with the parameters laid down by Presidential Decree 187/2001.

It should also be noted that on a number of occasions the control body has adopted a wide, and hence erroneous, interpretation of the law providing protection to PDO and PGI products in some cases by a surprising extension of its scope.

By way of example, the wording "*aceto balsamico*" (Balsamic Vinegar) found on the labels of many compound products has several times been subject to censure by the control authorities in that wrongly considered to be a usurpation, imitation or evocation of the PGI product "*Aceto balsamico di Modena*" (Balsamic vinegar of Modena).

In this case, the European Commission, in EC Regulation 583/2009, containing the registration of the protected geographical indication "*aceto balsamico di Modena IGP*", clarified the situation at Recital 10: "Individual non-geographical components of that term may be used, even jointly and also in translation, throughout the Community, provided the principles and rules applicable in the Community's legal order are respected."

The control body's conclusion was thus unfounded, not finding support even from the reasoning behind the European regulation recognising the PGI product for which protection was requested.

In the context of the cases concerned with the application of the penalising provisions of Legislative Decree 297/2004 it is also worth mentioning the charge made by the control body relating to the breach of the first paragraph of Article 2 imposing penalties on anyone altering the protected designation, its registered distinctive marking or trademark.

The charge under consideration was made against a retailer for having indicated on a publicity leaflet the name of a PDO product with an incorrect version of the protected designated origin product. The leaflet listed the products offered at a discount, mentioning among these a PDO product. This latter had been displayed with the ge-

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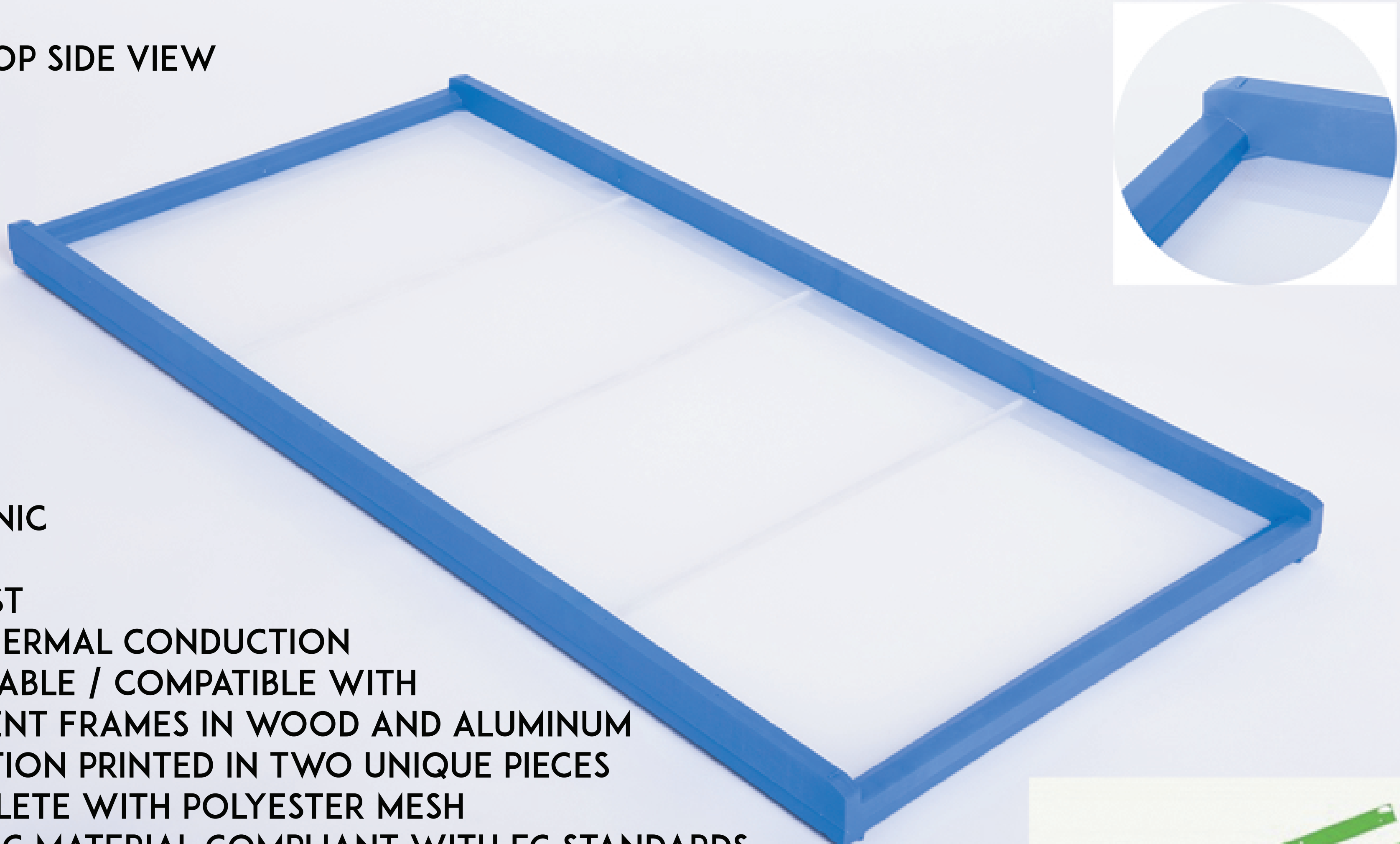

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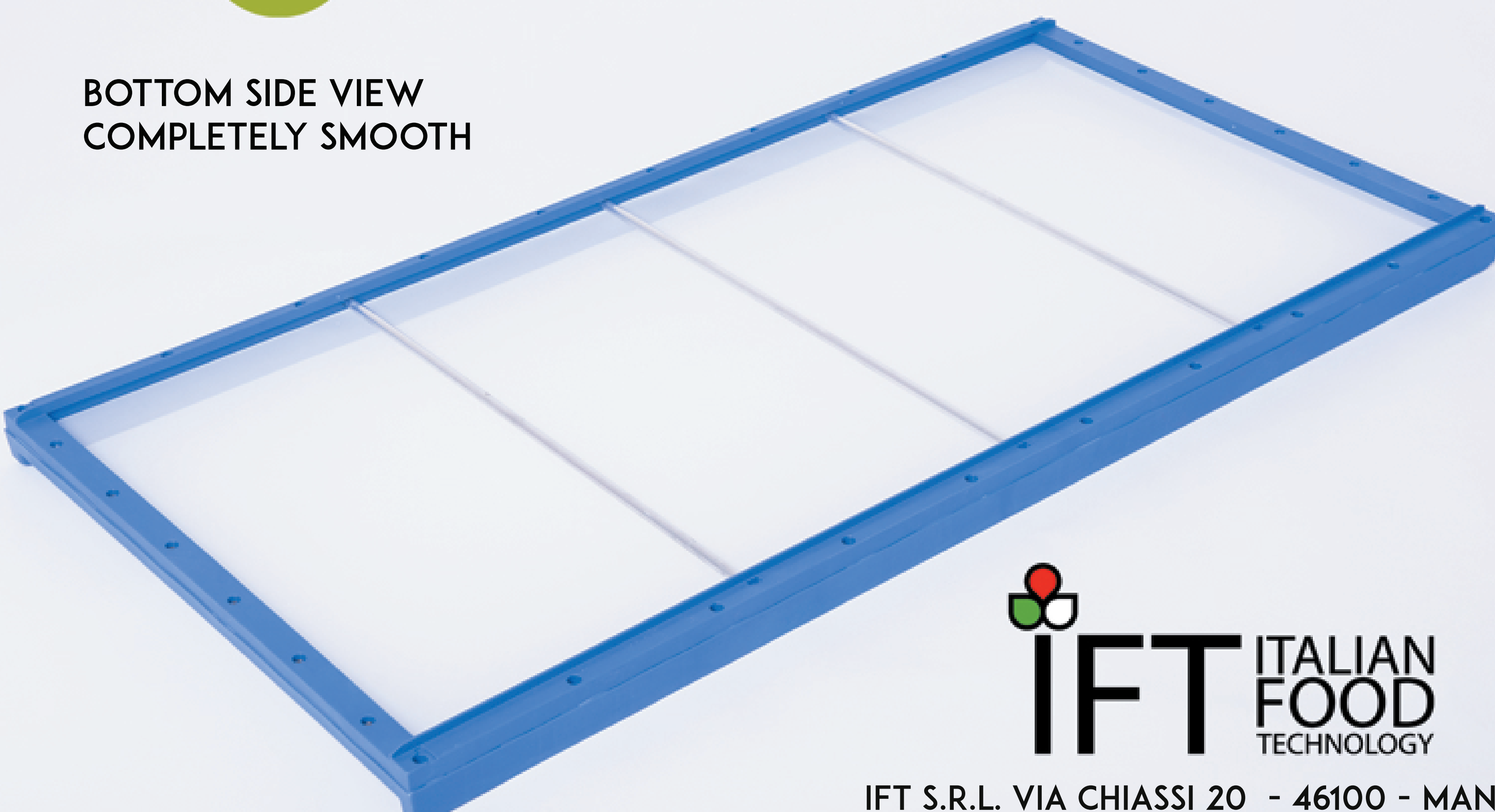

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neric name of the product followed by the name of the producer and the PDO acronym. An example might be: "*prosciutto Rossi DOP*" (PDO Rossi ham) rather than "PDO (Parma, San Daniele etc.) ham". In the view of the control body such wording represented an alteration of the protected designation, confirming the breach penalised by the first paragraph of Article 2 of Legislative Decree 297/2004. In reality, it appears clear that the wording forming the subject matter of the criticism did not represent an intention to amend, change, transform or alter the protected indication or the PDO trademark. Its sole purpose was to inform customers of the possibility of buying some quality products displaying particular trademarks at a good price. In addition the leaflet was found at the point of sale and thus there was no danger of equivocation for the consumer who would thus be able to ask for further information about the leaflet. In effect, it could be argued that no dam-

age was inflicted.
It also needs to be emphasised how the provisions of our legal system protecting quality products also apply to PDO and PGI products from other Member States which are held, marketed and sold in Italy. Food sector operators who thus buy products or raw materials from other countries belonging to the European Union must be very careful over how they are mentioned on the label to avoid imitating or evoking protected designations recognised in other countries.
It appears for example, that officials from the Ministry of Food, Farming and Forestry initiated administrative proceedings resulting from the offer on sale of products bearing the words "*olive Kalamata*" (Kalamata Olives) on their labels, alleging that this represented an unlawful usurpation of the Greek protected denomination "*Olive di Kalamata DOP*" (PDO Kalamata Olives) under paragraph 2 of Article 2 of Legislative Decree 297/2004. The same control authority has however abandoned a number of these administrative proceedings given that, from the investigation carried out, at the time the allegedly unlawful acts were identified, the Argentine varieties register included a variety of table olives called "Kalamata". Given that the registration in the above register had been effected prior to the recognition of the Greek PDO, this meant that the term "Kalamata" could be used freely including for non-PDO olives so long as the product labelling system made no further mention of the territorial origin of the Greek protected designation product.
In conclusion it can be stated that in practice, in the cases of the breaches of administrative and criminal law in the matter of the origin of food products and products bearing quality trademarks, food labelling has been of considerable importance in the assessment of whether or not to lay charges for such alleged breaches.
We would thus suggest unhesitatingly to operators that care should be taken when formulating such labelling. In particular, a degree of caution is required in the use of optional terms, signs, drawings and images which represent territorial references or which evoke geographical origins. A correct and well-thought-out formulation of the obligatory and optional elements used in labels and presented in advertising will undoubtedly reduce the risk of unpleasant disputes in the future.

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4

Proceedings of the Pastaria Festival 2018. Challenges and opportunities in the global pasta market

Ewa Kania
Euromonitor International

A summary of Ewa Kania's address to the conference entitled *Pasta: trends and consumption in Italy, in Europe and around the world, in 'away from home' and retail sales channels*, held as part of Pastaria Festival 2018.

IIn 2018, the global pasta market is worth USD25 billion, and is predicted to see a CAGR of 2% at constant 2018 prices, to 2023. Western Europe dominates among all continents in terms of pasta consumption with 4.5 billion tonnes of pasta sold in 2017. However, the volume growth of pasta in Western Europe is predicted to slow, with a CAGR of less than 1% between 2017-2022, which strongly indicates maturity.

Fast growing markets such as the Middle East and Africa and Asia Pacific are predicted to see value growth over the forecast period, with Middle East and Africa 5% CAGR and Asia Pacific 4% CAGR between 2017-2022.

In the Middle East and Africa region: Morocco, Nigeria and Egypt are the fastest growing countries in terms of pasta volume sales. In those countries sales are driven by the influence of western countries; young consumers experimenting in the kitchen, and pasta being used as a replacement for rice. Egypt significantly contributes to the growth of Middle East and Africa, with 25% of total pasta volume sold in the region. In 2018, pasta became an important staple food among Egyptian consumers. For the first time, pasta was on the government ration card for consumers who receive food subsidies. The government took an important step in introducing Egyptians to pasta as an alternative to rice, and slowly changed Egyptians' dietary habits. In terms of competitive landscape, Maleka is the leading pasta brand with 9% of retail value sales growth, followed closely by Masreya which saw only slightly slower value growth between 2016 and 2017. Both brands are known for their relatively lower prices and are mainly purchased by middle- and lower-income households, which represent a significant percentage of the Egyptian population.

In Asia Pacific, pasta volume sales are mostly driven by China and India, which are predicted to see CAGRs of 16% and 7%, respectively, over the forecast period. In China and India, pasta is relatively small as the pasta is considered as a 'new' staple food and substitution to rice. Consumers embrace western lifestyles and access to a variety of pasta brands is easier through expanding shelf space in grocery retailers. However, Japan generates 40% of pasta volume sales in Asia Pacific, and is predicted to see

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stagnant growth over the next five years. This slowdown from one of the biggest contributors to pasta sales in Asia Pacific will hinder growth in the region. Consumers in Japan look for convenient solutions when planning their daily meals, which is evident in the increased popularity of single serve packs of dried pasta, called “hayayude”. Interestingly, despite being convenient and quick to cook, chilled pasta is unpopular in Japan and has an unhealthy image among Japanese consumers. In terms of the competitive landscape, Nisshin Seifun Group Inc, owner of the Mama and Ao No Dokutsu brands, remained the leader in the Japanese market with value growth of 1% between 2017 and 2018. In 2018, the company continued to actively promote both brands by launching various promotional activities such as Pasta Life Community and pop-up illumination events. Marketing campaigns and promotional activities are the key drivers encouraging Japanese consumers to buy pasta products.

In terms of absolute growth, the Middle East and Africa leads, followed by Western Europe. However, the ratio of dried pasta vs chilled pasta differs between fast growing and developed countries and indicates in which direction the marker is moving. In Western Europe, over half of the growth of




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pasta comes from chilled pasta, whereas in the Middle East and Africa, dried pasta sales drive growth.

Italy leads in terms of absolute growth of both chilled and dried pasta in Western Europe. In France, 90% of pasta growth will come from chilled pasta, whereas in the UK, over the forecast period, dried pasta will decline in favour of chilled pasta, which is predicted to see growth. In Western Europe convenience and premiumisation are the drivers of chilled pasta sales. As demand for premium and convenient products grows, manufacturers will extend their portfolios with new more exotic flavours and premium ingredients. Chilled pasta manufacturers detected the importance of healthy attributes and extended their ranges with free-from alternatives, as shown by Ugo Foods in the UK.

In 2017, health & wellness pasta was worth USD3 billion, what accounts for 12% of total pasta sales by value. Health & wellness pasta is predicted to see a CAGR of 8% at constant 2018 prices over the next five years to 2023, and the growth will mostly be driven by Western Europe and North America. Italy leads in terms of value growth, followed by the US, France and the UK. Health & wellness pasta in Italy is predicted to reach USD1 billion by 2022, whereas in the US the estimated value is USD70 million, and in France, USD38 million. Gluten-Free Pasta is driving growth of the HW market in most of Western Europe and North America. As demand for Gluten-Free Pasta increases, manufacturers explore alternative ingredients to corn and rice, such as legumes.

The growth drivers of pasta depend on how developed the country is. Volume growth is driven mostly by fast-growing markets, where dried pasta is increasingly used as a staple food to replace rice in diets. Developed countries boost value sales with the introduction of more expensive premium, convenient and healthier pasta products. Chilled pasta continues to grow as time-pressed consumers look for easy solutions, while Gluten-Free continues to lead in the health & wellness space.

5

Italian pasta export share rises to 33%

Centro studi economici Pastaria

With more than two billion kilos shipped abroad in 2017, Italy consolidates its leadership on the world market. Turkey also in the running, topping 17% of the share for the first time.

Out of every three packs of pasta exported in the world, one is Italian. This is what emerges from the latest figures, updated to 2017, published by UN Comtrade, the United Nations Commodity Trade Statistics Database, which confirms Italy's leadership on a global scale, both in terms of production and in terms of foreign sales, with over two billion kilos of pasta shipped to around 200 countries.

Undoubtedly, the most significant aspect of this is that Italian pasta consolidated its market share in 2017, rising to 33.4%, from the 32.9% share of the previous year.

A few tenths of a percentage point, nibbled away from smaller competitors, but which have not however affected the shares of other world leaders, starting with Turkey, which in 2017 topped 17% of the share of the world pasta market, for the first time.

Looking at absolute values, Ankara's foreign sales have topped the one billion kilo threshold, but only five years ago Turkey had not even reached a share of 700,000 kilos. Although a long distance away from the top two, the third largest exporter is still China, but in this case the majority of the exports are noodles, a product which is not in direct competition with traditional pasta products, having different characteristics and preparation methods. Beijing has also slightly increased its share, reaching 8.7% in 2017. Ranking fourth is Belgium with 3% of the share, followed by the United States with 2.9%.

South Korea, Germany, Spain, Mexico and Indonesia follow on their heels, and this completes the top part of the classification (that of the first ten exporters).

The Russian Federation has also shown a positive development, exporting close on 113 million kilos of pasta in 2017, overtaking France and breaking cleanly away from Tunisia, the Netherlands, Oman and Egypt.

The winning duo, which accounts for more than half of the world exports, does not, in any case, seem to overlap in terms of trade partners. Italy sells predominantly to Germany, the United Kingdom, France, the USA and Japan, while Turkey exports its pasta mainly to Africa and to some areas of the Middle East, with the bulk of its volumes destined for Angola, Benin, Somalia, Togo and Iraq.

The only overlapping market is Japan, to which Italy ships over 70 million kilos of pasta and Turkey at least 50 million (but this is nearly twice the figure of five

THE WORLD PASTA EXPORT RANKING (DATA IN KG)

	2013	2014	2015	2016	2017
Total, of which:	**6,046,024,608**	**6,132,431,884**	**5,828,588,406**	**6,118,030,304**	**6,122,719,326**
Italy	2,003,469,769	2,055,788,495	1,947,639,748	2,013,076,248	2,045,867,557
Turkey	693,212,361	735,285,629	672,105,277	831,370,393	1,055,256,494
China	501,938,617	510,669,460	501,770,369	523,784,186	534,822,930
Belgium	156,611,667	138,977,149	148,974,949	163,006,669	183,180,206
United States of America	202,523,463	210,844,292	213,060,649	179,130,659	177,328,578
South Korea	95,053,671	96,525,481	104,867,235	134,466,480	170,180,955
Germany	97,987,954	101,407,785	116,428,300	117,462,372	123,623,856
Spain	59,931,011	87,946,285	103,482,541	110,055,938	120,496,728
Mexico	69,466,446	71,629,659	72,909,449	72,599,471	117,944,266
Indonesia	128,244,440	135,746,231	120,635,147	130,686,074	115,463,856
Russian Federation	77,666,442	97,049,986	103,376,402	103,397,232	112,862,241
France	108,598,543	111,938,838	113,859,575	108,328,921	111,909,737
Tunisia	103,504,783	71,162,325	84,835,657	75,837,052	101,726,809
The Netherlands	59,078,938	75,329,524	61,750,766	72,182,250	81,130,076
Oman	75,187,828	92,408,923	62,723,889	62,735,827	80,175,522
Egypt	65,755,159	78,435,935	54,007,881	41,047,376	64,446,825
Austria	53,076,456	46,541,485	51,681,901	56,002,238	61,531,259
Greece	55,324,977	51,994,188	52,010,178	53,112,378	55,986,598
Canada	61,671,329	67,203,175	72,825,593	61,877,817	55,746,142
Peru	46,037,809	47,446,737	48,439,703	51,416,256	49,566,471
Malaysia	45,724,913	57,723,089	46,626,067	40,274,309	41,220,752
Czech Republic	42,304,393	41,041,342	34,293,180	42,202,700	40,869,971
Japan	26,393,434	28,183,510	31,908,197	36,504,357	39,264,151
Poland	26,618,188	25,394,807	29,684,248	32,924,048	38,322,365
Hong Kong	34,853,652	31,463,663	n.a.	n.a.	34,881,357

Source: UN Comtrade

THE WORLD PASTA EXPORT RANKING (DATA IN US$)

	2013	2014	2015	2016	2017
Total, of which:	**9,130,135,768**	**9,356,326,542**	**8,579,227,220**	**8,624,273,459**	**8,374,100,037**
Italy	2,880,980,901	2,971,118,211	2,647,961,617	2,595,694,853	2,628,181,540
China	811,901,058	838,953,072	819,875,032	837,766,228	865,366,124
South Korea	320,812,952	320,231,481	330,726,183	409,646,742	514,390,128
Turkey	494,026,710	507,051,276	418,183,194	422,170,478	490,647,116
United States of America	364,001,536	376,662,299	389,551,820	337,918,412	348,386,594
Belgium	326,758,679	305,586,759	273,161,672	284,919,036	312,541,778
Germany	216,608,263	227,962,072	224,816,806	230,954,810	252,775,776
The Netherlands	191,844,428	218,537,173	177,254,935	206,306,668	238,831,809
Indonesia	204,533,717	224,587,489	191,382,392	193,801,058	229,457,777
France	225,137,184	238,018,227	217,960,594	200,785,225	216,311,217
Mexico	78,017,089	69,971,930	82,363,002	76,369,219	181,340,579
Austria	159,698,107	155,182,098	140,872,915	151,761,372	168,912,485
Canada	175,914,141	167,606,924	179,582,655	151,450,153	138,395,768
Spain	110,404,737	130,060,130	122,680,829	125,970,572	132,356,167
Japan	87,602,384	90,731,479	94,775,411	122,102,397	129,682,700
Russian Federation	109,998,796	130,209,551	106,292,951	94,155,885	108,820,829
Hong Kong	81,679,819	84,526,836	93,939,188	94,457,784	95,469,621
Poland	42,803,367	49,746,105	55,278,791	62,494,283	76,535,847
United Kingdom	65,396,705	81,075,331	72,020,914	64,867,048	73,636,244
Malaysia	88,229,660	110,586,898	82,722,740	69,520,480	73,089,632
Hungary	39,884,989	50,727,707	38,540,628	49,489,015	70,659,271
Egypt	65,274,468	53,540,851	76,244,608	52,974,078	67,721,644
Switzerland	95,485,577	97,271,933	66,366,687	66,136,708	64,914,548
Singapore	50,295,546	56,729,922	51,505,360	52,460,699	56,785,600
Tunisia	77,285,268	51,020,173	57,978,205	45,988,314	52,583,117

Source: UN Comtrade

years before).
Other common trade outlets - albeit of lesser importance - are Canada, where Turkey is growing at an exponential rate, and Germany, where Italy's leadership does not, however, seem to be feeling the repercussions, considering the fact that every 385 million kilos shipped by Italy corresponds to little more than 11 million from Turkey.
In monetary terms, with 2.6 billion dollars of exports in 2017, Italy gained a share in the world market of over 31%, an increase compared to 2016, but a slight drop if compared with the levels of five years before.
In terms of turnover, Turkey is only in fourth place with 6% of the share, preceded by China and South Korea.
A cross comparison of the data on the volumes exported and their economic values shows a substantial difference in price between Italian and Turkish pasta: a ratio of approx. three to one. In 2017, a kilo of Italian pasta sold on the international markets at an average price of 1.28 dollars FOB, against 46 cents for the Turkish product.
It is also important to keep in mind that in the five-year period 2013-2017 prices fell considerably. Nevertheless, while Italy managed to limit its discounts to little more than 10% in the five years, Turkey adopted a decidedly more aggressive approach, selling at 35% discounts.
Ankara's policy has indisputably attracted new purchasers, but at the expense of a reduction in proceeds to 490 million dollars, less than a fifth of the foreign turnover for Italian pasta.
The dynamics of real exports (i.e. based on physical volumes) in the five-year period under examination shows a CAGR (compound annual growth rate) of only 0.4% for Italy, against 8.8% for Turkey. In terms of monetary payments, the average annual variation of the exports is negative for both countries, with Italy at -1.8% compared to only a fractional drop for Turkey (-0.1%).
Finally, with regard to imports, the United Nations data confirm the leadership of Germany and the USA, with volumes, in both cases, topping 500 million kilos. France comes next, at a short distance, followed by the United Kingdom, Japan, Belgium and the Netherlands.
With regard to more recent developments, ISTAT data updated to the first three quarters of 2018, confirm a growth trend, albeit slight, in Italian pasta exports. From January to September, foreign sales topped one and a half billion kilos (+0.2% compared to the same period of 2017), while in terms of value, the increase appeared decidedly more significant, with 2.5% of annual growth, raising the turnover of these first three quarters to close on 1.8 billion euros.

6

Pastificio La Ginestra

Editorial staff

“Falling in love with pasta” is the slogan used by Pastificio La Ginestra to encompass, in one single concept, its own work philosophy, and it alludes to the fact that it is impossible for customers not to fall in love with the product the moment they taste it, in the same way as the owners of the company were captivated by it, when they launched the business. It couldn’t be any other way for a product that is closely linked to the territory, that expresses the best flavours Italy has to offer and that, at the same time, takes into account a number or demands set by the market.
The company was founded in 2001 by two brothers and their respective families and now, even though employs a number of people, it is primarily a family run concern. The partners of this limited liability company, who at one time were businessmen in the catering sector, decided to venture into the world of frozen pasta, retaining the traits of those who work in a kitchen and know full well what the needs of sector operators and the end customer are. Years later, catering continues to be a key element in the work of Pastificio La Ginestra, representing a really important part of the reference market. The company focuses in particular, and with a great deal of satisfaction, on the HORECA market, and the La Ginestra product is also marketed in the HORECA sector with a private label. The product can be found in many points of sale in the large-scale retail sector in the north-west of Italy, where it is present under the Ginestra brand in 500g packages. In all cases, what characterises La Ginestra’s pasta, is its high-quality and a close link with the territory. As the owners explained, “We always try to buy from companies that are geographically closest to us, and when this is not possible, we make a point of not going beyond our national borders”. And even a simple glance at the company’s catalogue will reveal an obsessive attention for the individual product.

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www.pastificiolaginestra.it

The number of products totals around sixty, and include gnocchi, as well as filled and plain pasta. The company has an average daily production of more than 1,800 kg of pasta.

But if we revert our attention to the product, it is in La Ginestra's range that one becomes aware of the regional specialities, that demonstrate the strong ties with Italy's lands: borage, Piedmont PGI Hazelnuts, PDO Gorgonzola, Raschera PDO cheese, Sardinian PDO pecorino cheese, Bianchetto truffle from Valbormida, typical of the Ligurian Langhe and the Ponente Savonese, to name but a few. One needs only to look at the company's website to confirm not just the ingredients that characterise every single product, but also the name of the farm that supplies the raw material. Mushrooms, chestnuts, artichokes, rosemary, leeks, pesto, fresh potatoes: the reference to the territory is clear to see in every line and with increasingly different variations. Even when it comes to flour, the range is extensive: classic semolinas produced in Italy, as well as type 2 flours, buckwheat and chestnut flours.

The shapes range from regional ones, from Italy's deep south to the north: they include trofie, cavatelli, scialatelli, orecchiette, but also tortellini, cappelletti, ravioli,


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tagliolini and agnolotti. All the fillings are prepared in-house and contain no semi-processed products.
For a company that is perched between Liguria and Piedmont, the prince of corporate production can only be the ‘Plin’, that is offered here in the classic shape with meat and vegetables or in a more innovative version, such as mullet and basil. The price list also includes so much more: simple egg or egg-free pasta, gnocchi, filled pasta and pasta for vegans and vegetarians. And it is in these last two, provided in many other products that differ from each other (20 for vegetarians, 4 for vegans) that the innovative spirit of the company emerges. And even though its starting point is tradition and whilst wanting to respect it in every way, the company is also keen to provide an innovative approach to its work, looking to new sectors of the market.
The pasta produced by Pastificio La Ginestra is available in many points of sale in the large-scale retail sector in the north-west of Italy, and in many mini-marts or specialist stores, as well as in fine restaurants. The company is also gradually consolidating its commercial relations in Spain, Portugal, France and England.
Another element that the owners are keen to highlight is their attention to the environment. The company’s electricity and

gas supplier guarantees it only uses TUV SUD certified green energy and the company itself uses photovoltaic panels to ensure the minimum waste of resources.
The consistency and tenacity in offering a quality product, without ever overlooking the seriousness of its relations and prompt deliveries, are being rewarded by the market. The current premises are beginning to become too small for a production that is increasing in quantity and quality every day. There is a need for new spaces, so it is no coincidence that the transfer to a new, larger plant, still in VALMORBIDA in the municipality of Murialdo in the province of Savona, will be happening shortly. It is possible to see the beginnings of new challenges: the consolidation of a line of ready sauces and the acquiring of a number of certifications. What will remain is the attention paid to the environment, to hygiene, to the product's safety and the obsessive search for customer satisfaction, introducing increasingly new product elements or processes, but without ever betraying Italy's tradition.

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7

Durum wheat, imports from Canada close to zero

Centro studi economici Pastaria

Having (practically almost) lost the Italian market, Ottawa is now focusing on strengthening its presence in the United States and North Africa.

There are at least three reasons behind this dramatic reduction in Italy's imports of Canadian durum wheat. First and foremost, the reputational crisis associated with glyphosate residues, which was widely reported in the mainstream press. But not less damaging was the impact associated with the poor quality of last year's harvest, with frequent cases of mycotoxins being found in Canadian silos, and the passing, in February 2018, of the law on the labelling of pasta, which introduced the obligation to indicate the origin of the raw materials used in the manufacturing process.

The fact remains that Canada, the world's leading exporter of durum wheat, has practically become a "desaparecido" on the list of Italy's suppliers. Already last year imports from Ottawa had fallen by roughly by a third, dropping from over a million tonnes, to 720,000. But the real collapse took place this year, with imports from Canada, in the first six months of the year, at just over 40,000 tonnes, against almost 400,000 tonnes in the same period of 2017 (-90% approx).

The phenomenon is also associated with the overall negative dynamic in the imports of durum wheat in Italy, a trend that has been going on for three years now and which seems to be continuing in 2018.

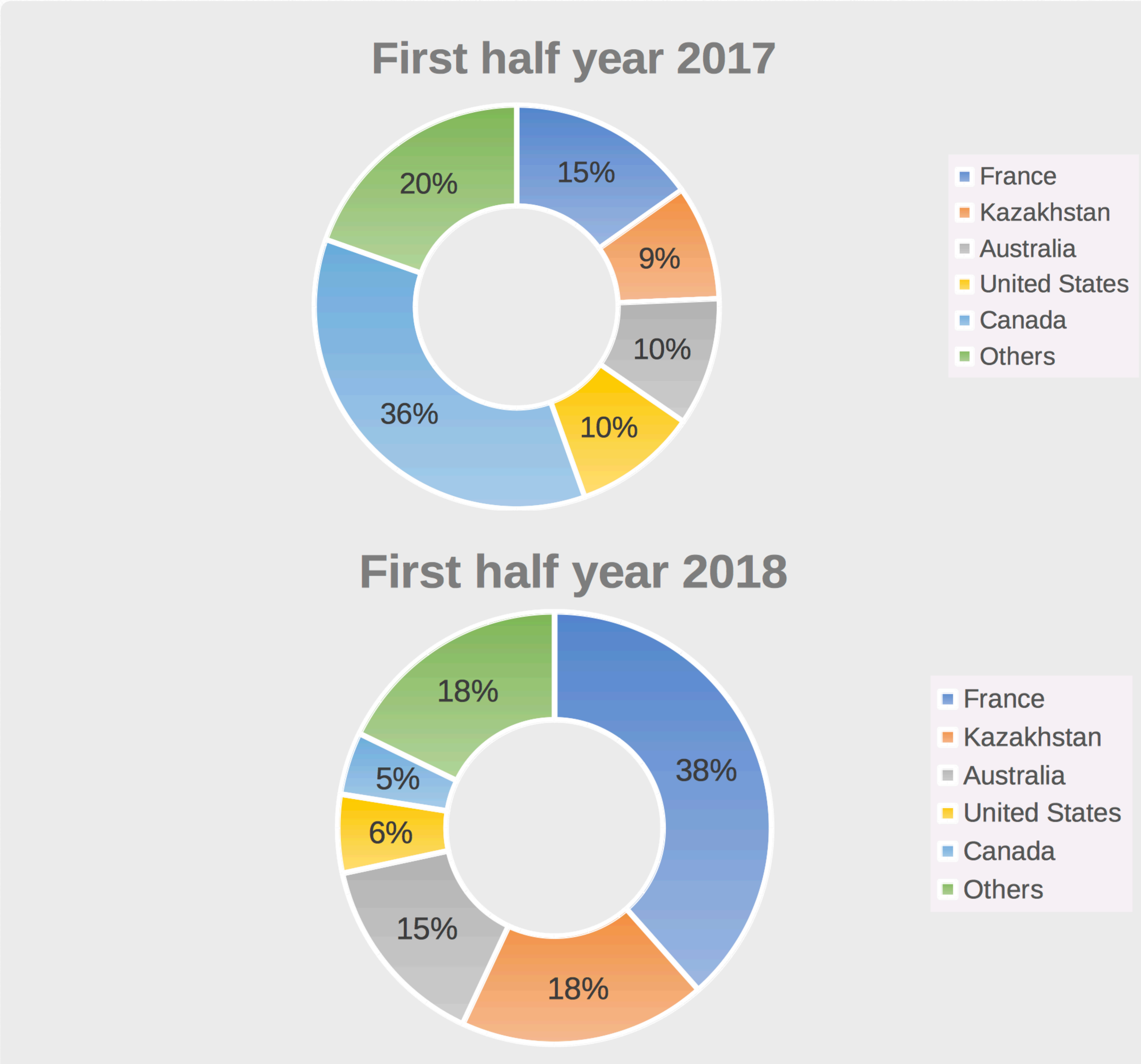
Purchases from abroad, which physiologically cover a quota of 30% of Italy's durum wheat requirement, estimated to be around 6 million tonnes, have also been limited due to the decidedly good production results enjoyed by Italy over recent years, thanks to improved yields that have amply compensated for the loss of surface area, which has dropped in the meantime to under 1.3 million hectares, the lowest in the past five years.

With over 5 million tonnes, 2016 was a record harvest year, and although the two years that followed produced less brilliant results, they were nonetheless more than satisfactory, with volumes well over the threshold of 4 million tonnes, both last year and this year.

Returning to importation, Canadian durum wheat has been ousted first and foremost by wheat varieties from the other side of the Alps. The statistics referring to the first six months of 2018 speak for themselves, certifying – at a distance of only 12 months – more than double the volume for French grain imports, with 359,000 tonnes recorded from January to June 2018, already more than the 272,000 tonnes recorded by ISTAT for the entire year of 2017.

Significant increases also in wheat imports from the Black Sea, in particular from Kazakhstan, and from Australia, with year on

Chart 1 **ITALIAN IMPORTS OF DURUM WHEAT**



year increases of 71 and 22 percent, respectively.

Looking at the current composition of wheat provenance, France's share is 38%, but a year ago it only accounted for 15% of Italian durum wheat imports. Canada, which had a share of 36%, has spiralled down to 5%, while Kazakhstan has risen from 9% to 18%. Australian wheat imports are at 15% (against 10% in the first six months of 2017), while the USA has dropped to a quota-volume of 6%, against 10% a year ago.


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Table 1 **ITALIAN IMPORTS OF DURUM WHEAT (TONNES)**

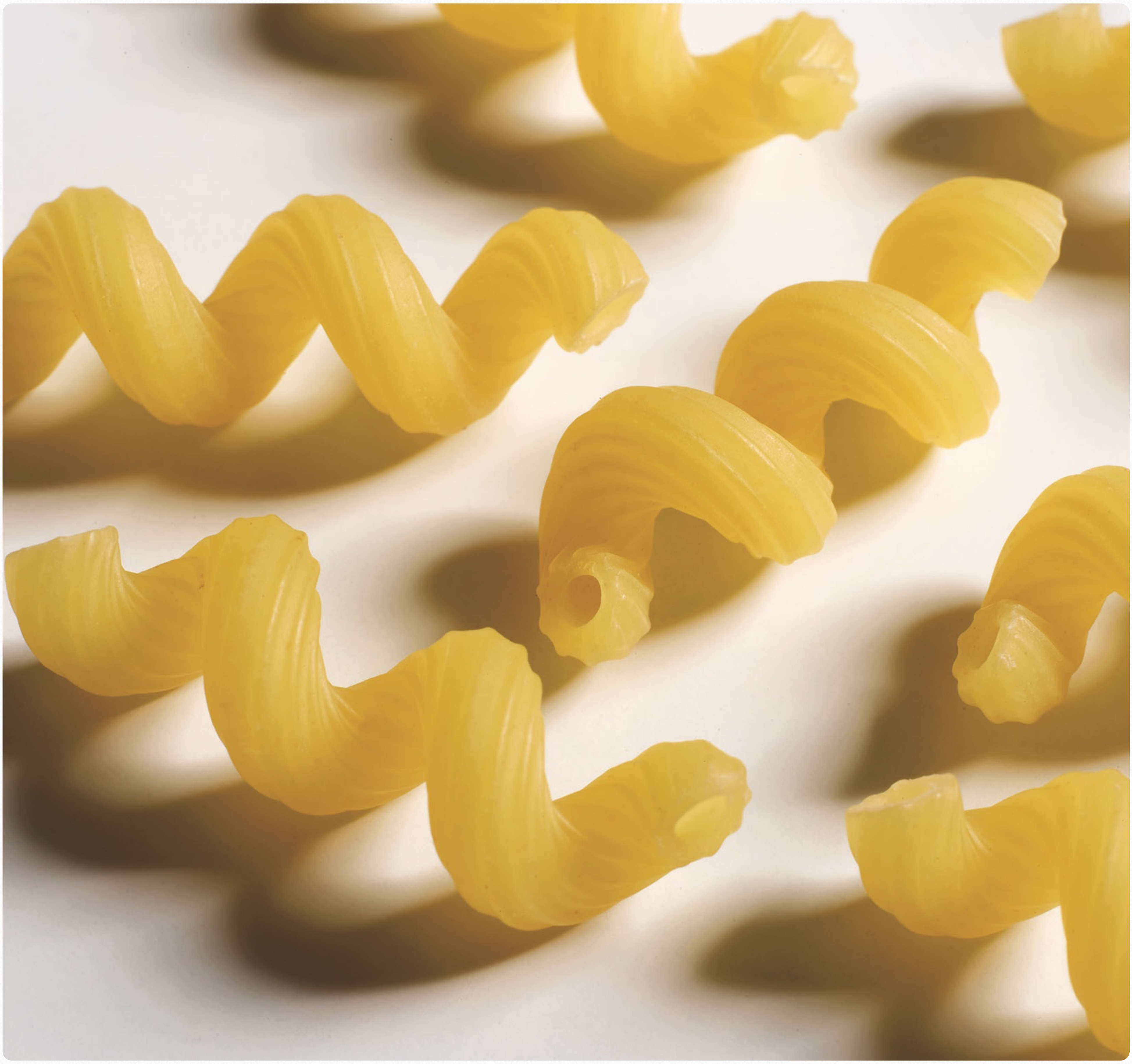
	1st Half year 2017	1st Half year 2018	Variation
World	1,098,515	934,623	-14.9%
France	166,497	359,483	115.9%
Kazakhstan	100,907	172,85	71.3%
Australia	112,793	137,11	21.6%
United States	109,202	55	-49.6%
Canada	394,126	43,818	-88.9%
Others	214,991	166,362	-88.9%

Seen from Ottawa's standpoint, the loss (or almost) of the Italian market will not have a significant impact on the export potential of the Country, which is seeking to strengthen its presence on the international markets.
Analysts' forecasts, which predict an increase in exports of around 5% by the end of the 2018/19 season, expect a positive trend in Canadian sales, especially in North Africa, chiefly to Algeria and Morocco.
The North-American Country will also have plenty of crops available this year, thanks to a massive 19% increase in planted surface areas. Based on the October calculations, the output should increase by 15% compared to last year, notwithstanding the drop in yield caused by negative climate trends.
Considering stocks from previous harvests, estimated at almost a million and a half tonnes, supply should settle around an overall figure of 7.2 million tonnes, almost two-thirds of which will be exported abroad.
In the entire 2017/18 season, notwithstanding the sharp increase in shipments to the USA (+260%), Canadian durum wheat exports have dropped by approx. 8%. Algeria, Canada's first outlet market, has absorbed over a quarter of its volumes, followed by Morocco with 21% and the USA with 19%. Italy, in the meantime, has dropped below the 10% threshold, even although it stood at 17% during the last season, and at 28% only two seasons ago. Among Ottawa's target markets, Peru and Japan are assuming a certain importance followed, albeit at a considerable distance, by Nigeria, Haiti and Venezuela.

8

Short news

Editorial staff



Pasta Armando features in a new movie

A short feature entitled "*Attenti al Gorilla*" (Look out for the Gorilla) is Pasta Armando's latest venture into the world of movies. The De Matteis pasta factory (Avellino, Italy), not new to cinematographic collaboration, has decided to sponsor a new comedy produced by Warner Bros Pictures and Wildside, directed by Luca Miniero and starring Frank Matano, Cristiana Capotondi, Lillo Petrolo, Francesco Scianna, Diana Del Bufalo and the voice of Claudio Bisio. The movie will be in theaters from January and is based on an American court's decision to recognize the status of gorillas as "non-human persons". The pasta factory had already worked with the same Neapolitan director on a series of short features called "*Il sogno di Armando*" (Armando's Dream) that told the story of Armando De Matteis's love for his land and "*A capotavola ci sei tu*" (Invitation to Sit at the Head of the Table), which celebrated the 25th anniversary of the De Matteis Agroalimentare company.

La Molisana reaches an agreement with Milan and Sampdoria

Pasta and soccer are a match made in heaven for La Molisana. After launching its packaging dedicated to the Rome team, the company has reached agreements with Milan and six other professional soccer teams: Sampdoria, Genoa, Palermo, Pescara, Bologna and Atalanta. The success of the pasta devoted to fans of Rome's red-and-yellow team was enormous, with 300,000 euros sales in the first month after it appeared in the stores.

La Molisana was founded in 1912 and continues its phenomenal growth after the spurt that came with the invention of square spaghetti and the decision to focus on the wholegrain market. In the last seven years, explains CEO Giuseppe Ferro, the company has become co-leader on the Italian wholegrain pasta market, and its sales have grown from 16 to about 150 million (35% of the company's turnover comes from sales abroad, in 80 countries). The company has likewise experienced increased employment, growing from 91 to 240 workers. The company has invested over 60 million euros in technology, particularly for its new production lines.

Granoro, new website

A new internet website provides all the company's supply chain details. It's called granorodedicato.it, and it's the virtual space of the Granoro pasta factory, devoted to exalting the production of grain in

Puglia, illustrating the labor and passion of 250 farms in the region, where 15,000 tons of grain are produced every year.
The project, undertaken 7 years ago, wants to involve the consumers, also thanks to social network It shows people how grain is selected in Puglia, hulled and slowly stone-ground, how the resulting coarse semola meal is mixed with pure spring water from Caposele and Cassano Irpina, how the pasta is shaped using bronze dies. The website describes more than grain and pasta, however, it also tells the personal stories of the farmers in videos that narrate their devotion to the land and shared passion.

Barilla takes over the Pasta Zara plant

Pasta Zara says 'yes' to Barilla. The company based in Riese Pio X (Treviso, Italy) has accepted the Barilla's offer to acquire the business division relative to its plant at Muggia (Trieste, Italy). The Board of Directors of Pasta Zara, with the sole shareholder (the Bragagnolo family), defined Barilla's offer "the best industrial, social and economic solution for its employees and creditors […] because, in addition to guaranteeing the current job levels, it provides the best economic settlement for the creditors of Pasta Zara and also allows the group to acquire the pasta produced by Muggia plant". The Zara brand and the other plants remained excluded from the transaction; a production agreement will also be provided for the transition period.
For Barilla, the Muggia plant gives them a site with high production capacity, well placed to serve European and overseas markets. The agreement was reached almost simultaneously with the date on which Pasta Zara would have had to present its plan for settlement with its creditors to the Court of Treviso.

Pasta Rummo, okays the relaunch plan

It all started back in October 2015, when the river Calore flooded the production systems of the pasta factory causing tremendous damage and forcing the company to suspend production, that it was able to resume only in part. After that came insolvency proceedings with continuous efforts to settle with creditors, later interrupted by the Court of Benevento.
Now Pasta Rummo will see the light again thanks to an agreement on the debt reached with 18 creditor banks to relaunch the company before Christmas. The industrial plan calls for return to business with sales of about 100 million euros on reaching full capacity, and the development of

sufficient cash flow to ensure repayment of the bank debt and interest over a period of eight years to eliminate a debt exposure of about 80 million euros; the plan also includes provision of financial support by MBFacta, the Mediobanca group's factoring company. The company has already passed the critical stage, and was able to finish 2018 with sales of about 90 million and Ebitda of 12%.
The operation is focused on developing the "Slow Processing" brand with marketing and trade activities as well as investments for improving the security of the pasta factory and increasing its production capacity. Rummo would also like to develop its legume pasta made with Tuscan chickpea flour and red lentils in four shapes.

De Cecco, minibond for 25 mln euros

The De Cecco Group has received two loans for a total of 25 million euros. It plans to use the funds for research and development, innovation, environmental safeguards and energy efficiency. In this specific case, the company issued an unsecured senior bond loan for 21 million underwritten by 15 investors and admitted for quotation on the Stock Exchange. Anchor investor of the operation was the Cassa depositi e prestiti SpA, which underwrote the bond to the extent of 12.5 million euros; other underwriters were Ersel SIM SpA, Consultinvest Asset Management SGR SpA, Confidi Systema! SC, Volksbank and Banca Popolare di Bari ScpA. The bond will expire in six years and has a tailor-made repayment program; an unsecured senior loan bond for 4 million is not quoted, and was underwritten by a single professional investor, issued at par for a term of five years. De Cecco currently has sales of 450 million euros, Ebitda of about 50 million and profits of about 13 million. It exports 50% of its production to over 100 countries in the world.

Retropasta Roma, presents its new 3D pasta factory

Pasta shapes designed and created with the 3D printer and eight new ideas to choose from every month. This is the formula applied by Retropasta Roma, the new pasta factory of the Retrobottega restaurant, inaugurated recently by two businessmen who are also chefs, Alessandro Miocchi and Giuseppe Lo Giudice. Customers can choose between long pasta (tagliolini and fettuccine) or gnocchi made from organic red potatoes from the Bologna hills; between the basic shape of pasta made from water and burnt wheat

flour from Puglia, or four shapes of filled pasta (tortellini with Parmigiano Reggiano cheese aged 30 months with a capon version for the winter months, agnolotti al pin filled with braised oxtail and pecorino romano, ravioli filled with creamed salt cod and tortello with double closure filled with squash and caciovallo cheese from Abruzzo). A corner of Retropasta is also devoted to organic Italian preserves, where customers can also buy flour, eggs and tomatoes.

Pasta di Camerino, special mention

Special mention “for the social impact of the passage of generations on an Italian territory stricken by earthquake”. The award went to Entroterra spa at the event “Un affare di famiglia” (An Enterprising Family) assigned by the promoting committee on the occasion of the meeting of the National Council of Young Entrepreneurs at the headquarters of Confindustria in Rome.
The Maccari family business, in its second generation with Federico and Lorenzo Maccari, now has 68 employees and sales of almost 18 million euros a year. In addition to distributing egg and semolina pasta on the Italian market with the brand La Pasta di Camerino, Entroterra spa has also started distribution of its Hammurabi pasta made from ancient stone-ground einkorn wheat

Giovanni Rana, first shop in London

It was a brief experience but highly successful. A few months ago, Giovanni Rana opened the first temporary store in London, “Famiglia Rana Grocer” at no. 51 of Marylebone High Street, right downtown. The shop was totally devoted to Italian products and gave curious customers the opportunity to taste fresh pasta, but also tortelli and ravioli. The store was designed to be a little tour of Italian style and taste, with six corners, each devoted to the types of tortelli and ravioli that the Italian company already sells in English with the “Famiglia Rana” brand. Other ingredients for preparing recipes were also on sale, as well as utensils, hand-painted tablecloths and plates created by ceramists for a real Italian pasta experience.

Correggio, Pastificio Barbieri is focusing on spirulina

An alga with interesting characteristics worth discovering will be the focus of the Barbieri pasta factory’s new launch. The company, based in Correggio near Reggio

Emilia (Italy) has wagered its future on spirulina, “the food of the 21st century” according to the World Health Organization, and the product chosen by Nasa for the astronauts, defined by the U.N. as the “food of the future”. This highly nutritious alga is also grown in nearby Novellara, also in Reggio Emilia province, by the Sabar company which cooperates with Barbieri. Spirulina is an important wager for the pasta factory which went through a difficult period but has now moved on, thanks to the support of a group of entrepreneurs and an ambitious development plan. In addition to the spirulina pasta, Barbieri also presents a new organic line and a new line of organic wholegrain pasta.

Moro compie 150 anni

A hundred and fifty years of passion, territory and tradition. The Moro pasta factory of Chiavenna, in Sondrio province (Italy), was founded as a flour mill and pasta factory in 1868 (the old mill has been restored and is now a museum of industrial archeology, open to visitors every day).
In the 1960’s the company made an important decision, flanking its production of semolina pasta to a line of specialties of the Valtellina district known as “pizzoccheri”. Now the company has 50 employees and sales of 15.5 million euros annually. It produces 8.5 million kilos of pasta, of which 40% is exported.

The Chiesa pasta factory receives an award in Venice

The Chiesa pasta factory has received another award. The Tuscan company was awarded the Silver Lion in Venice in recognition of its distinguished business career of 55 years. The award was assigned during the International Grand Prize ceremony at the Cornoldo military presidium to Roberto Chiesa and his son Valerio, the recognized face of the company. It is not the first award won by the company: it has also won the RAI Horse award, a parchment received at Montecitorio and the “blessing” of Giovanni Rana. The pasta factory’s most noted invention is the gold tortello, which became a huge success on the social media thanks to a photo posed by Briatore and to a strategy aimed at various social network picturing the pasta with VIPs.

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