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*registered office*

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*operational headquarters*

Via Dall'Aglio 21/2 • 43122 Parma (Italy)

tel. +39 (0)521 1564934

fax +39 (0)521 1564935

Email [redazione@pastaria.it](mailto:redazione@pastaria.it)

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## **EDITOR-IN-CHIEF**

Lorenzo Pini

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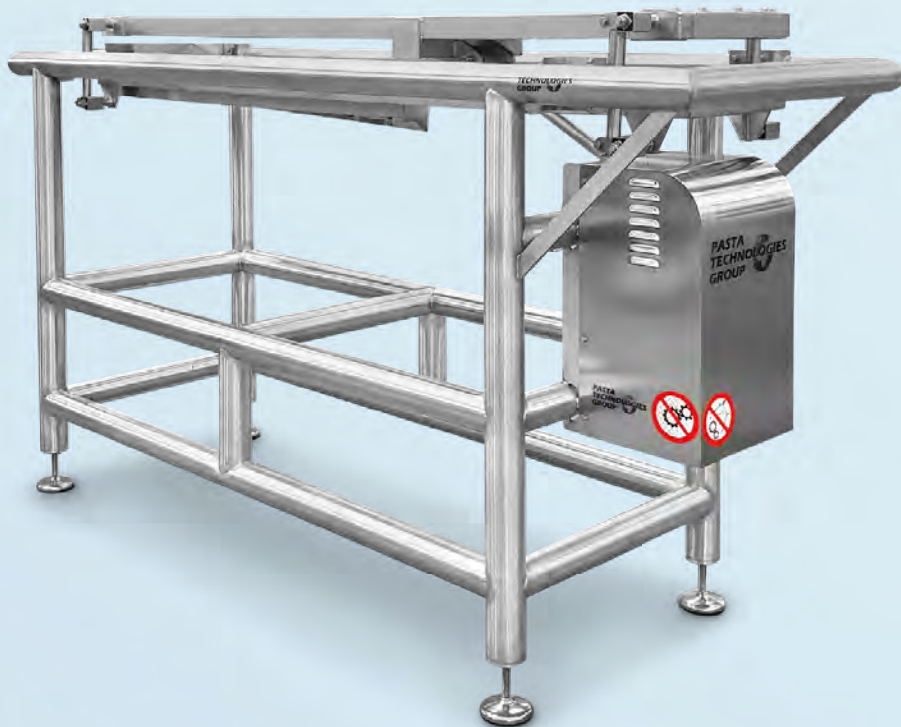
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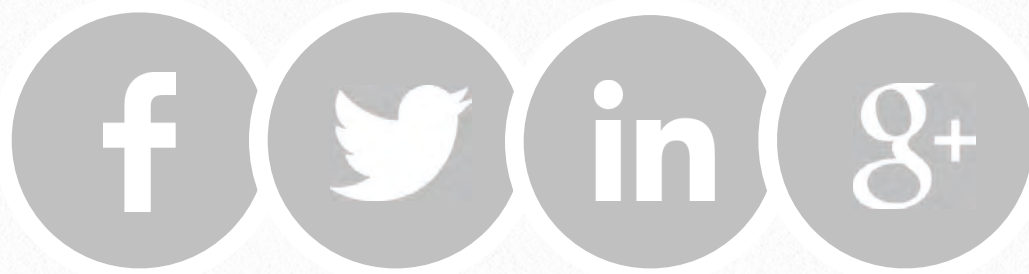
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1



# ***Proceedings of the Pastaria Festival 2018.***

## **New strategies for gluten intolerance: moving towards low-impact wheat for the prevention of celiac disease and other related disorders**

**Barbara Prandi**

Department of Food and Drug, University  
of Parma

Department of Human Sciences and  
Quality of Life Promotion, San Raffaele  
University of Rome

**Stefano Sforza**

Department of Human Sciences and  
Quality of Life Promotion, San Raffaele  
University of Rome



**A summary of Barbara Prandi's address to the conference *Pasta: innovative ingredients, health and nutrition* which took place as part of the Pastaria Festival 2018.**



Adverse reactions to wheat proteins can be divided into four macro categories: celiac disease (CD), wheat allergy (WA), non-celiac gluten sensitivity (NCGS) and non-celiac wheat sensitivity, NCWS). Celiac disease is an autoimmune enteropathy that develops in genetically susceptible individuals following the ingestion of wheat gluten or similar proteins present in rye and barley. Between 85 and 90% of celiac sufferers have the HLA-DQ2 haplotype and the remaining 5-10% have the HLA-DQ8 haplotype. The frequency of these genes in the population stands at around 30%, but fortunately the occurrence of celiac disease is much lower (about 1%). Of late, blood tests to detect the presence of gluten-related autoantibodies (antiendomysial, anti-tissue transglutaminase, deaminated anti-gliadin peptides IgA antibodies) are widely used to diagnose celiac disease. However, the reference method remains the duodenal biopsy which rates the condition of the intestinal lining using the Marsh Score system. At present, the only treatment available to people with celiac disease is the complete elimination of gluten from their diet. Gluten is a protein which acts as a nitrogen reserve and is present in quantities ranging from 6 to 13% of the weight of the wheat. Gluten is a complex mix of proteins which can be grouped into  $\alpha$ -,  $\gamma$ - and  $\omega$ -gliadin types (1/3 of gluten) and LMW and HMW-glutenins (2/3 of gluten). The amino acid composition of gluten has a high content of glutamine and proline (36-45% and 15-30%), and a low content of glutamic acid (2%), histidine, lysine and arginine (3%). Consequently, gluten has a low nutritional value (PDCAAS 0.25) On the other hand, its technological value is very high in that it gives viscoelasticity as well as starch and gas retention properties to doughs. An important characteristic of gluten proteins is their very high variability in sequencing (>40 types of gliadin in a single wheat variety). As with IgE-mediated allergies, in celiac disease it is not the whole protein which triggers the immune response, but a small portion of it (called an epitope). It is important to underline that the different isoforms of gluten proteins have a different content of these epitopes. As stated above, the genes responsible for celiac disease (HLA-DQ2 for 85-90% and DQ8 for the remaining 5-10%) are present in about 30% of the popu-



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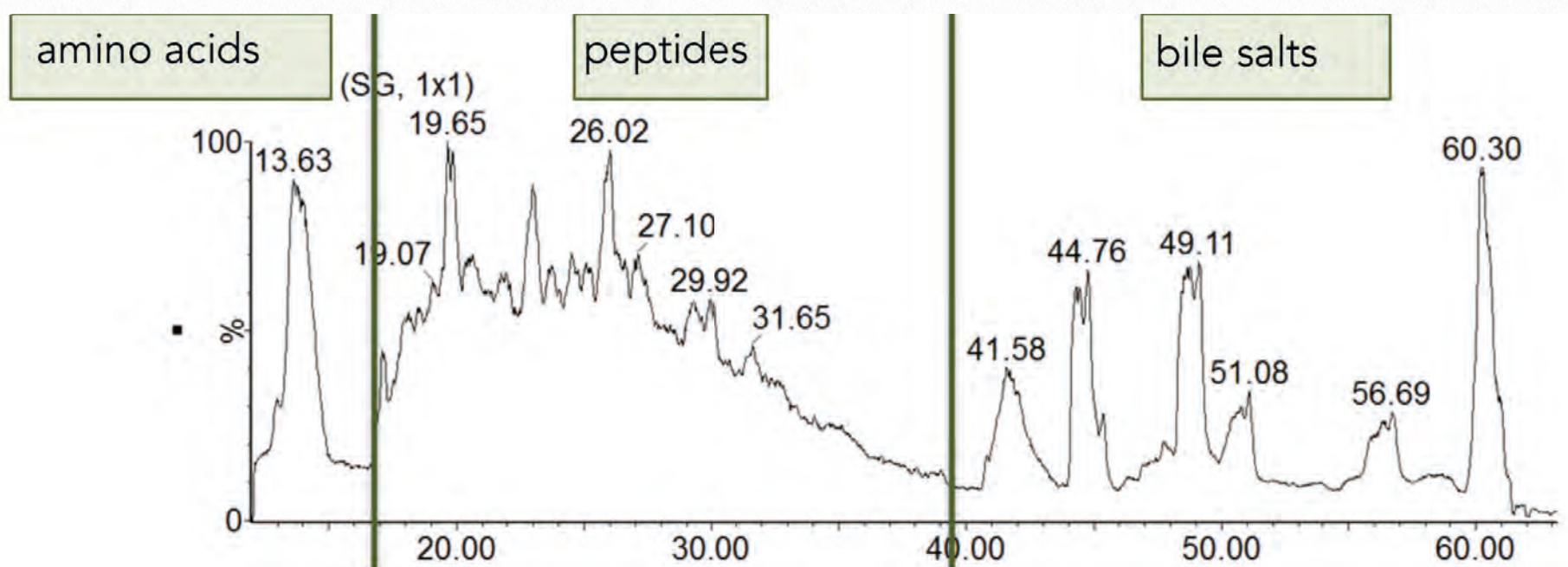
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**Figure 1** EXAMPLE OF A CHROMATOGRAM OBTAINED BY ANALYSING A SAMPLE OF DURUM WHEAT SUBJECTED TO IN VITRO DIGESTION



lation, though the incidence of celiac disease is much lower (about 1%). To date, it is not yet clear what triggers are involved in the tolerance/immune response balance. Several hypotheses have been developed, including the quantity and quality of gluten ingested, the type and duration of fermentation in wheat-based doughs, changes in intestinal flora, intestinal infections and stress.

The high sequence variability of gluten proteins means that different wheat varieties have a different content of celiac disease epitopes. Therefore, a reduction in the exposure of genetically susceptible individuals may lie in the selection of wheat varieties with good rheological properties but with a reduced content of epitopes. Furthermore, production techniques for bread, pasta and wheat-based products

could be selected to minimize the production of peptides containing epitopes during digestion.

During in vitro digestion of products containing gluten, the gluten is broken down into smaller peptides, which can be identified and quantified by liquid chromatography techniques combined with mass spectrometry. An example of a chromatogram obtained by analysing a sample of durum wheat subjected to in vitro digestion is shown in Figure 1.

By submitting more than 100 genotypes of durum wheat to simulated gastrointestinal digestion, seven peptides containing epitopes triggering the adaptive immune response were identified along with 3 peptides containing sequences that trigger the innate immune response. After synthesizing a standard isotope labelled pep-





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**Figure 2 FACTORS INFLUENCING EPITOPES IN GLUTEN**



tide, this was used as a standard for quantifying peptides deriving from gluten digestion. In this way it was possible to evaluate the different factors which could influence the quantity of these peptides, for example the variety of wheat used, the production process of the end product (bread or pasta), the region and year of cultivation (and consequently the agronomic practices adopted and climatic conditions) and breeding practices (Figure 2). The amount of peptides produced during in vitro digestion containing sequences that trigger innate immunity turns out to be fairly stable among the different varie-

ties of wheat because these peptides derive mainly from fairly conserved regions of gliadins (e.g. the N-term region). On the contrary, there is a strong influence of the genotype on the amount of peptides triggering adaptive immunity, because these derive from a region of gliadins that has undergone many mutations in the course of evolution, and is therefore subject to considerable sequence variability. The use of varieties which generate a lower amount of immunogenic peptides during digestion could therefore reduce the exposure of genetically susceptible people to epitopes. Using in vitro digestion models,





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pasta, for example, the peptide profile obtained after drying at high or low temperatures can be studied, whereas for bread the effect of different leavening techniques (brewer's yeast or mother dough) can be studied. Climate conditions also have a significant impact on the production of immunogenic peptides during wheat digestion. In fact, the same genotype grown in different regions can produce significantly different amounts of these peptides. These differences are even more pronounced when considering several cultivation years, where many

it is also possible to study how the different phases of the production process (such as bread or pasta) can influence the production of peptides involved in celiac disease during digestion. In the case of

weather conditions change, such as rainfall, temperatures etc. Finally, by studying the immunogenic peptide content in genotype digestions developed and filed over the decades, it has emerged that the con-



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tent of these peptides has not increased in modern varieties compared to ancient ones. On the contrary, ancient varieties generally show a higher content. Consequently, the breeding practices implemented over the years do not appear to have contributed to an increase in the immunogenic potential of wheat.

In conclusion, there are wheat genotypes that generate a smaller amount of immunogenic peptides. Furthermore, the environment has a significant impact on the peptide profile generated during digestion. Therefore it is possible to select agronomic practices aimed at minimizing the production of these peptides and select the production processes aimed at minimizing the production of immunogenic peptides during digestion.

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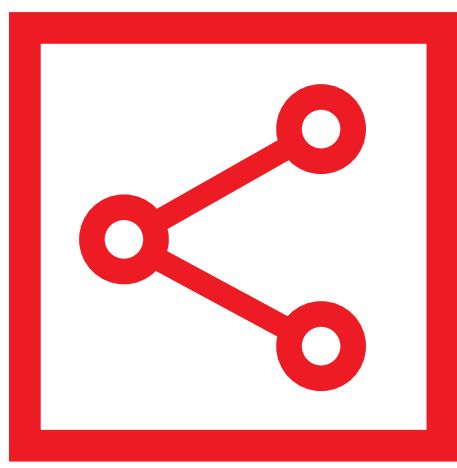
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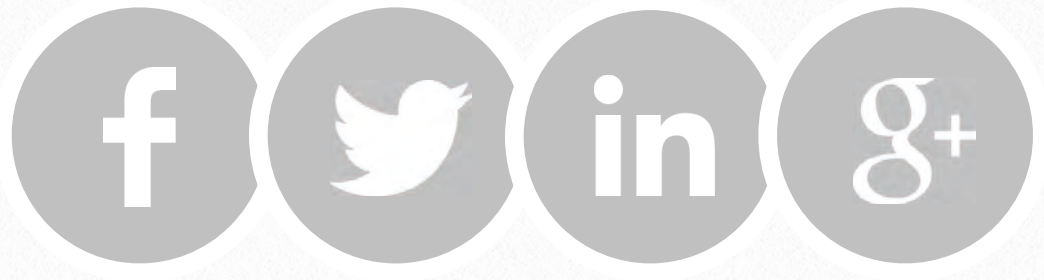


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# 2



## ***Proceedings of the Pastaria Festival 2018.***

Guia Beatrice Pirotti  
SDA Bocconi

## **The importance of being premium in pasta**



**A summary of Guia Beatrice Pirotti's address to the Pastaria Workshop on marketing which took place as part of the Pastaria Festival 2018.**



Beppe Severgnini writes: “Italians speak of food before eating it, while they’re eating it and after eating it”<sup>1</sup>. Never before has the food & beverage sector generated more consumer interest and curiosity than at the current moment. Consumers are ready, receptive, and are writing, reading and speaking only about food. And yet it is not at all easy for food and beverage companies to figure out the best competitive approach. There is a high risk of them all appearing identical to the consumer, all having similar marketing mixes and good quality products, but nothing that really distinguishes one from the other.

So how can we think outside the box? Unilever has announced its intention to launch premiumization strategies. Starbucks has opened “Reserve Roasteries” all over the world and has declared that it is engaged in the premiumization of its own brand. The word premiumization is starting to appear in a variety of contexts and can work as a differentiation strategy, so it is important to give it a clear-cut definition. Forbes describes it as the “bridging of luxury and mass market consumption” which is implemented by “making the “good” better and the “greater” more accessible (Forbes, 2016)<sup>2</sup>. So on the one hand, it involves offering better product and/or service quality to the consumer while, on the other, making this quality accessible. “The real luxury is undoubtedly spending money on quality items, while doing without others,” sustains Oscar Farinetti who, with the Eataly e FICO brands, espoused the strategy of premiumization by meeting the demand for healthier products, more refined but still clearly belonging to Italy’s food and wine culture and tradition. The mechanism is to produce goods and/or services as though they were intended for a niche of connoisseurs, but then to target the highest possible number of people. This brings about a change in the way that consumers manage their budget. Consumers do not necessarily want to spend more, but they do want to spend their money better. Today’s consumers have more sophisticated tastes, they are increasingly better informed and their choices are always in line with this greater awareness. This means that their hierarchy of aspirations is much more sophisticated than before. In other words, when consumers select products and/or services to purchase, they give priority to





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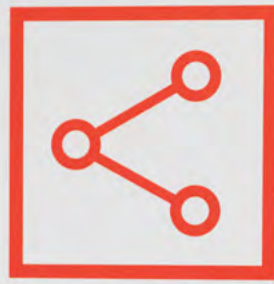
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# PASTARIA FESTIVAL

Sharing know-how on pasta manufacturing

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those that they know will fulfil their aspirations, provided that they are also affordable in terms of their spending budget. Let's consider an example. Consumers once used to drink economically-priced local wine; now they seek out more sophisticated wines or craft beers, products of excellent quality, to be consumed on different occasions. In other words, the brands that appeal to these aspirations - offering high quality but at affordable prices - have adopted a premiumization strategy.

The premiumization trend has impacted a large variety of sectors, from alcoholic drinks, to soft drinks, to cosmetics, to the confectionery sector, to packaging. It is also affecting the pasta sector. What is happening in the pasta sector is the emergence of an increasing premium sector, with the power to combine a quality product, made from carefully selected raw materials, with greater attention to the supply chain on the one hand and to consumer needs on the other. Let's think, for exam-

ple, of the needs connected with well-being - which can, however, now be offered at an affordable price. Pasta producers are seeking ways to become premium, i.e. to offer excellent products while making them affordable to a much larger market segment.

How can this change be brought about? This question provided the basis for a research project conducted by the SDA Bocconi School of Management. According to the outcome of this research, in order to embark upon the road to premiumization, food & beverage companies, especially those in the pasta sector, should focus on five fundamental pillars: menu, service, experience, systems and procedures, and communication. Let's look at this in detail.

1. **Menu.** Premiumization is achieved by enhancing the ingredients, certifying the raw materials and having the ingredients "endorsed" in the same way as designer items. It is no coincidence



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- that Voiello's specialties are endorsed by the chef Antonino Cannavacciuolo.
2. **Service.** Concentrating on the moments prior to and after consumption can also be helpful in terms of premiumization. La Molisana, for example, has opened a temporary store in Milan and in Rome. Video and multimedia stations make it possible for customers to take a virtual tour of the pasta factory, viewing all the various production phases.
  3. **Experience.** The role of production and of the flour mill can be central in boosting a premiumization strategy. Felicia, for example, places great emphasis on the importance of having its own flour mill. As well as being a powerful marketing tool, it also enables the company to continuously improve its R&D and to conduct checking procedures on all steps of the supply chain. Also on the subject of experience, the store can always act as a point or a moment of discovery. Another example is Alibert, which has launched an intensive programme of tastings in LSD chains.
  4. **Systems and procedures.** Another aspect to be sought is artisanship, but through a standardized process. For example, Luciana Mosconi produces its tagliatelle from sheet pasta that is double-kneaded and then delicately

rolled out without mechanical pressing. To this end, investment in training, in order to turn collaborators into artisans, has proven to be a winning strategy in the creation of a more artisanal product, but in a system that offers economies of scale.

5. **Communication.** In the path towards a premium strategy, the customer becomes increasingly more involved in the communication process. Consumers become players: they express their opinions on products and services and are considered by the company as real connoisseurs. Raviolificio Lo Scoiattolo creates events such as "Ingredienti Incredibili" (incredible ingredients), a day with Marco Bianchi dedicated to families with children, including workshops and tastings.

Being premium is imposing itself as a way of standing out from the rest, but in order for it to work well, particularly in high production sectors such as pasta, the five pillars must be taken into consideration.

## Notes

1. B. Severgnini, *La testa degli Italiani*, Milano, BUR, 2008.
2. Forbes, 16 June 2016, *Premiumization: The Most Affluent Retail Trend Of 2016*. The article is available at the following link: <https://www.forbes.com/sites/millystilinovic/2016/06/16/premiumisation-the-most-affluent-retail-trend-of-2016/#67368e8b4416>.



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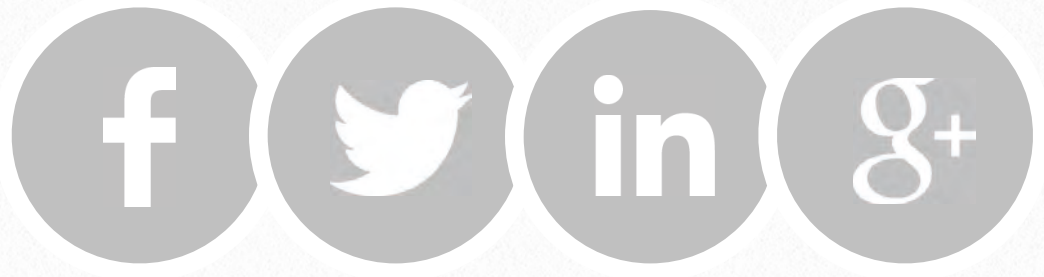
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# 3



## 27 September 2019: Pastaria Festival is back

Editorial staff



The date has been announced for the third edition of Pastaria Festival, the free event dedicated to professional updating on the work of pasta production, organised by Pastaria, in collaboration with associations, universities, professional bodies, sector experts and companies.

The 2019 edition will take place in Parma on Friday, 27 September.



Friday, 27 September 2019 is the date of the third edition of Pastaria Festival, the free event dedicated to professional updating for pasta producers. Once again the event will take place in Parma, the city which, according to UNESCO, is “creative in gastronomy” and where Pastaria itself is based. It is the city in which the sector’s key players (associations, research institutes, universities, professional bodies, companies and experts) will gather together to share their knowledge and skills on the activity of pasta production, in a free day – just as Pastaria’s specialist information is free – of meetings, workshops, conferences, presentations and laboratories. Lorenzo Pini, publisher and editor-in-chief of Pastaria says “We’re expecting to see a significant rise this year, in terms of participants, in the already large numbers of those who attended last year’s edition, that brought over 340 qualified operators to Parma.”

“We will certainly be repeating the original and highly praised format of conferences, workshops, laboratories and presentations in a number of free-to-access rooms running simultaneous sessions. This means that all visitors are at total liberty to choose their own training option, based on their own interests and their position within their company.”

Pini goes on to say “The next issue of Pastaria will reveal the names of

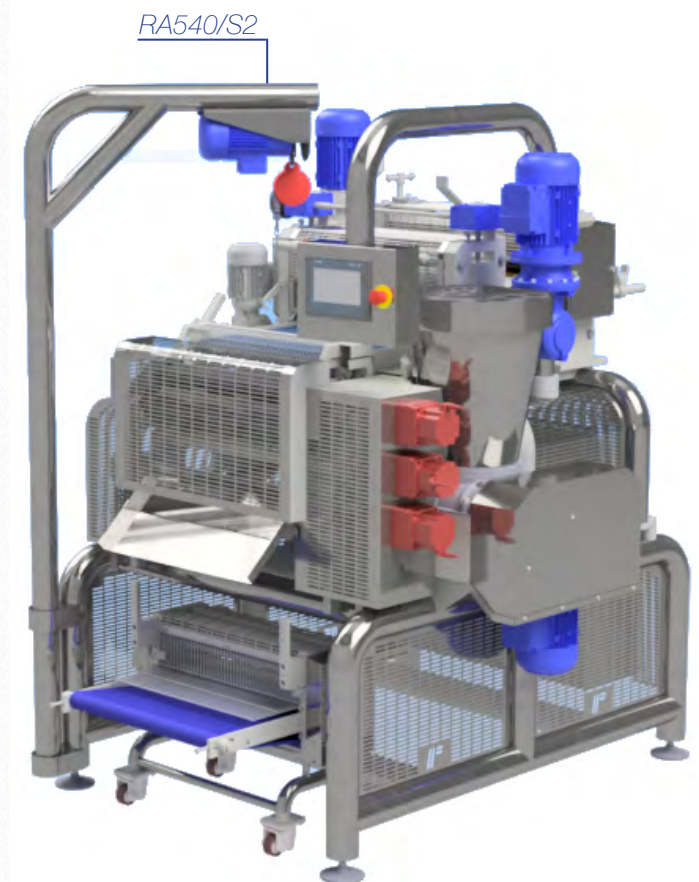




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members of the event's Steering Committee, who will be called upon, once again, to produce a comprehensive, detailed, high quality program that is intended to garner the interest of the different professional figures that work inside a pasta factory and for whom Pastaria Festival is expressly designed: owners, quality assurance managers, purchasing managers (technologies and ingredients), research and development managers, communication and marketing managers, sales managers, production managers and logistics managers”

In addition to the packed programme of conferences and workshops, Pastaria Festival will also provide visitors with opportunities to make contact, in the exhibition

area, with companies supplying machinery, ingredients and services for pasta production.

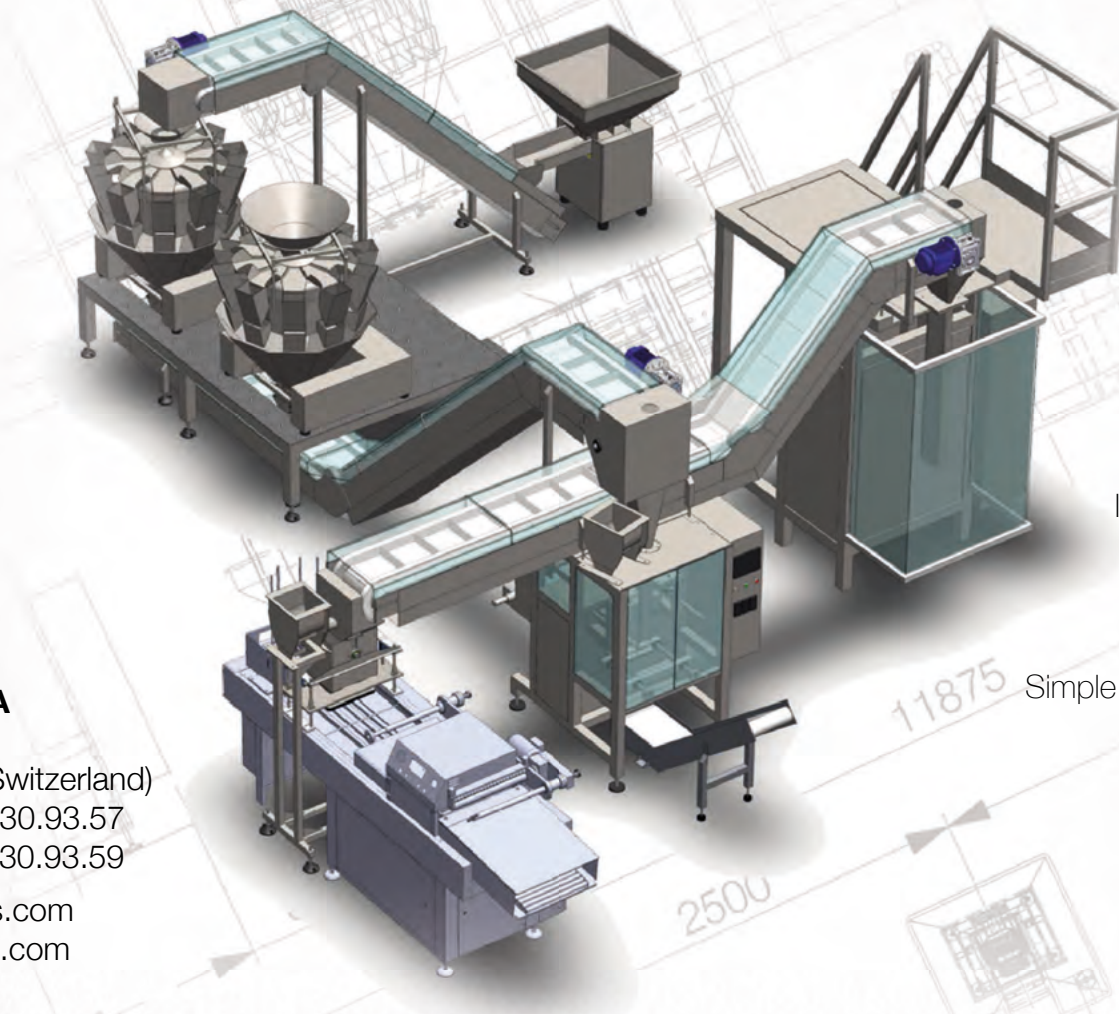
“The 2019 edition will also have lots of new things that we will be pleased to inform all operators about soon, via the pages of Pastaria” concludes Pini.

## To take part

Participation is free, by invitation, and reserved for pasta makers. Pasta factories interested in receiving an invitation can register free on the website [pastaria.it](http://pastaria.it).

Suppliers of equipment, ingredients and services for pasta production who are interested in sponsoring the event or participating in it, are asked to contact the Pastaria editorial offices (tel. +39 0521 1564934).





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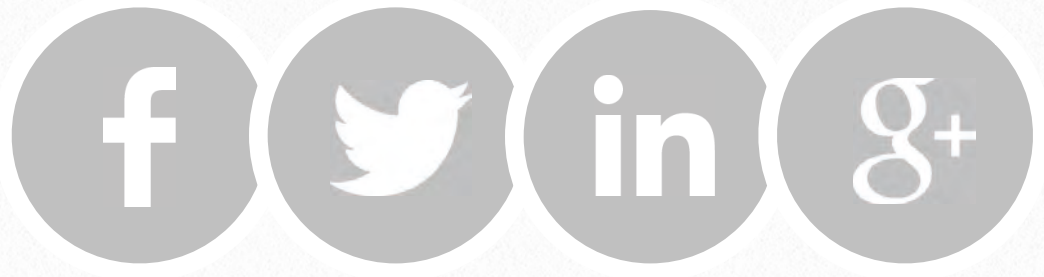
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4



# “Produced by” and “produced for”: when an indication on a label is brought before a Judge

Lino Vicini



**A true case about the seizure of a batch of pasta produced in Turkey for an Italian pasta factory and intended for Africa that had mendacious markings and a false provenance on the label.**



The recent episode described below demonstrates once again what problems a simple indication on a label can cause to an operator.

It should be pointed out immediately that the sentence in question dealt with only the precautionary phase of preventive confiscation of a lot of pasta and does not refer to a complete assessment and resulting judgement of the unlawful act.

Such assessment is, in fact, made by the judge only upon the conclusion of the preliminary investigations conducted by the investigative bodies.

To enable a better understanding of the considerations set out below, it's useful, first, to review a number of points of criminal procedure.

Normally, a period of time, which can also be quite extensive, elapses between the start of criminal proceedings and the passing of sentence.

Naturally, in a trial system that respects the right of defence, this period of time is essential for properly establishing the unlawful act and for allowing the investigated person/entity the possibility to defend themselves.

It is similarly clear that in this period of time dangers may arise for the criminal proceedings and for ascertainment of the facts.

The investigated person/entity could flee and evidence of the unlawful act could be hidden or destroyed.

Precautionary measures have been provided for in order to prevent the passing of time from hindering the investigation of the crime and to ensure the correct application of the law on the part of the responsible bodies.

In general terms, we can say that precautionary measures are instrumental for criminal procedure, that is, they permit the investigation of the crime when there is a risk of tampering with evidence; they are urgent, that is, they are applied when delayed action would compromise the result pursued by the law; they are based on the prognosis of guilt at the current state of proceedings; they are immediately enforceable and provisional.

Without going into detail in the various technical aspects, it's necessary to point out that the prognosis of guilt at the current state of proceedings means that the precautionary measure can only be applied if there are "serious indications of guilt".





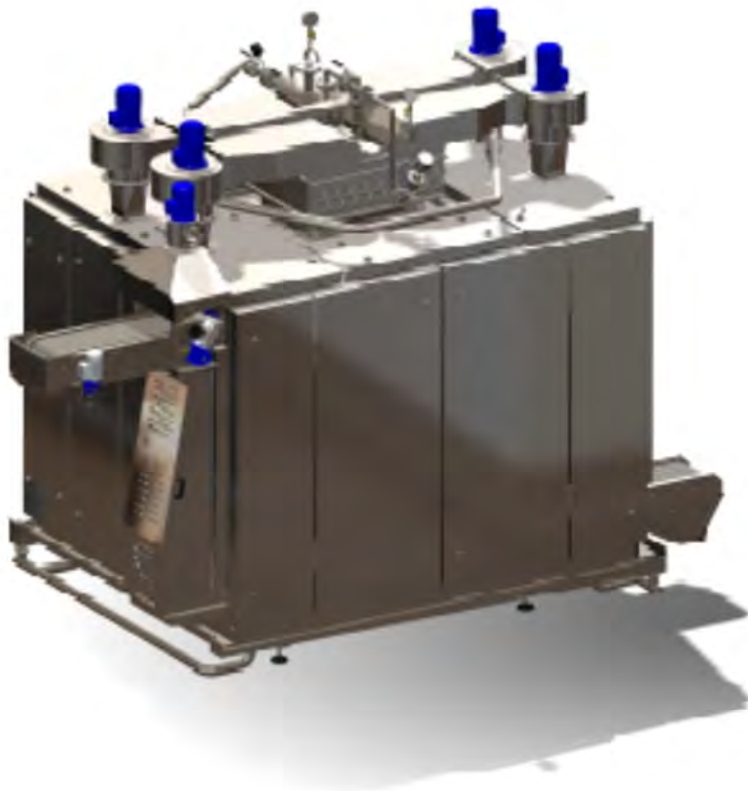
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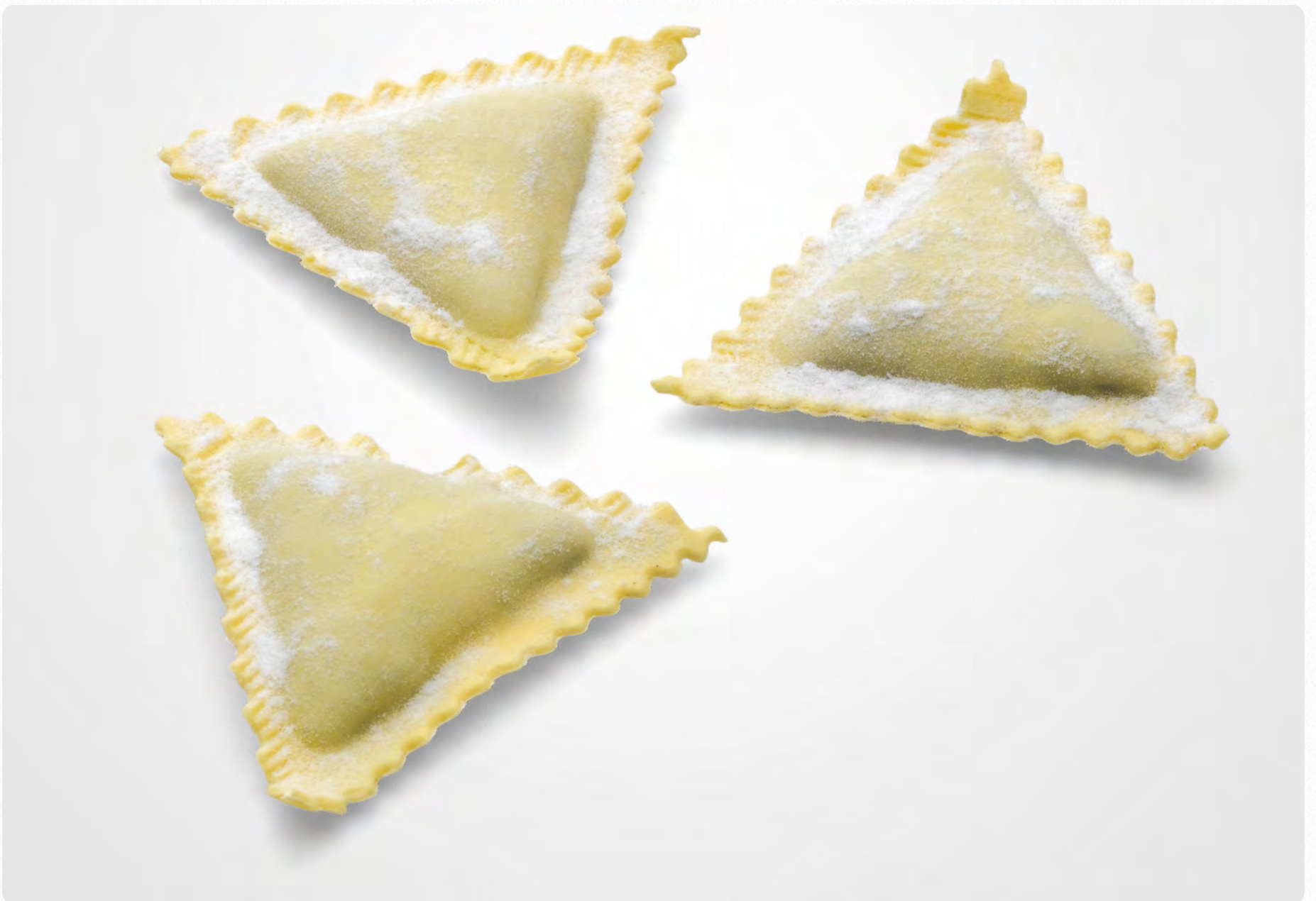


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This assessment is based on the evidence that the Public Prosecution gathers in the preliminary investigations.

The traditional Latin formula “*fumus commissi delicti*” refers to the existence of evidence of guilt attributed to a given person. This requirement is one of the necessary conditions for the application of precautionary measures.

The examination of said evidence occurs at the current state of proceedings, based on relevant evidence susceptible to modification over time on the part of the accused and of the defending counsel.

The precautionary measures, moreover, are immediately enforceable and provisional; this means that the judicial police have the power to enforce the order with force, also against the wishes of the affected person/entity and the effects of the measure must not condition the final decision of the judge.

Having clarified these procedural aspects, we can move on to the details of the case. With relation to the preliminary investigations of the Court of Genoa, the Judge confirmed the confiscation, provided for with urgency by the Judicial Police, of a lot of



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pasta identified as [...] with the [...] trademark clearly visible, followed by the geographical indication “Napoli – Italia – pasta di grano duro prodotta e confezionata per (Naples – Italy – durum wheat pasta produced and packaged for) – produced for [...] Gragano (NA) Italy” and the indication “made in Turkey”.

The goods checked at the port of Genoa came from Turkey and were directed to Africa accompanied by an invoice showing that they had been sold by a French company based in Paris to a company based in Mali.

The control bodies alleged the breach of article 517 of the penal code and of article 4, paragraph 49 of Law no. 350 of 2003.

To help the reader, it should be noted that art. 517 of the penal code sanctions the sale of industrial products with misleading signs<sup>1</sup>, while art. 4, paragraph 49, of the Finance Law 2004, legislation amended on a number of occasions by the legislator over time, punishes the marketing of products bearing false or deceptive indications of source or origin.<sup>2</sup>

Further to the application for reassessment on the part of the company’s legal counsel, the Court of Genoa confirmed the original decree of preventive confiscation.

It should be noted that said measure is provided for when there is the risk that the free availability of objects relevant to the

crime may aggravate or prolong the consequences or facilitate the commission of other crimes.

Objecting against the order of the Liguria Court, appeal was lodged to the Supreme Court based on various motives.

In the first motive the appellant claimed a breach of law with reference to the existence of the offense pursuant to art. 4, paragraph 49 of Law no. 350 of 2003.

As a matter of fact, in the absence of importation, the offence would not have been committed for the following reason: the confiscated pasta was only in transit from Turkey to Mali, both countries outside the European Union, without there being any customs procedures performed with a view to marketing the pasta in Italy and therefore only temporarily deposited in the customs area of the port of Genoa.

With the second motive, the appellant reiterated the inexistence of the *fumus* of the alleged crime and deduced a breach of art. 6 of the penal code.<sup>3</sup>

As a matter of fact, the issue of the invoice by Pastificio L.G. to Franco Africa of Ne-goce sas would not have represented in any way proof of a future marketing of the product in Italy, but only a tax procedure required as part of the sale in which the final destination in Mali was also indicated; the operation was therefore entirely performed abroad.





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The third motive refers to a breach of law since the facts would have possibly only implied an administrative offense, and not a criminal offence, provided for by art. 4, paragraph 49 of Law no. 350 of 2003. As a matter of fact, no deceptive label had been affixed while the source from Turkey was indicated as well as the “produced for” phrase with the trademark of the Italian company registered with the relevant Turkish institute.


Finally, with the last motive the appellant claimed that the Genoa Court was, in any case, lacking sufficient grounds.

The Public Prosecutor at the Supreme Court submitted their conclusion, requesting the dismissal of the claim.


The defending counsel lodged a written statement reiterating the described motives.

Specifically, the erroneous configurability of the crime punished by art. 4, paragraph 49, of Law no. 350 of 2003 in place of an administrative crime provided for by the fol-







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lowing art. 4, paragraph 49 bis of the aforementioned law was underlined.

As a matter of fact, the deceptive indication of the origin or source of products or goods integrates the offence in question as per art. 4, paragraph 49 of the Finance Law 2004 in the event that “the use of signs, figures or anything else that can induce the consumer to believe that the product or the goods are of Italian origin... without prejudice to the provisions of art. 49 bis”.

Said additional clause regulates the relationship between the two provisions.

As a matter of fact, the differential and peculiar element of paragraph 49 bis, which regulates an offense and not a crime, is represented by the absence of “precise and clear indications of foreign origin or source” of the product or goods.

The field of application of the administrative sanction provision therefore applies in the case (less serious) in which the product or goods are marketed in the absence of indications such as to avoid misunderstandings on the part of the consumer.

In the case in point, the inexistence of the crime provided for by paragraph 49 would clearly apply since no misleading label of source had been affixed but, rather, the very clear “made in Turkey” indication on the packets.

In addition, the trademark shown on the front of the packets contained the English wording “produced for” rather than “produced by” Pastificio G., proving the circumstance that the pasta had been produced by a Turkish company and not directly by the Italian pasta factory.

In addition to all the considerations set out, the affixed trademark was completely legitimate, being regularly registered by the Italian company also with the competent Turkish institute.

Completing their case, the defending counsel claimed the erroneous configurability of the alleged offenses with a view to the simple transit of the goods in the Italian territory, being shipped from and to countries outside the European Union.

As a matter of fact, the temporary introduction into the Italian territory of goods produced abroad and bearing misleading indications on their origin and source does not establish the offense punished by art. 4, paragraph 49 of Law no. 350 of 2003, being aimed exclusively as permitting technical stops for re-embarking on another ship with destination (so-called transshipment), there being, in this situation, no customs clearance for marketing in Italy.

Extending the spectrum of forms of conduct punishable by art. 4, paragraph 49, also to the mere transit of goods would lead to a clear breach of the prohibition of



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analogy of criminal law as per art. 25, paragraph 2, of the Constitution, art. 1 of the penal code and article 14 of the preliminary provisions.

The incriminating provision, in fact, which limits punishment to cases of “importation”, “exportation” and “marketing”, does not provide for simple transit in an Italian port.

The Supreme Court held the above-described motives to be without grounds. The starting point for the decision of the judges regarding legitimacy is the applied provision, that is, article 4 of Finance Law 2004 (Law 24 December 2003 no. 350) which, in paragraph 49, states as follows: “the importation and exportation for trading purposes or the commission of acts directed in an unambiguous way towards the marketing of products bearing false or deceptive indications of source or origin constitutes an offense and is punished pursuant to art. 517 of the penal code. False indication includes the printing of “Made in Italy” on products and goods not originating from Italy according to European regulations on origin; deceptive indication, also if the foreign origin or source of the products or goods is indicated, includes the use of signs, figures or anything else that can induce the consumer to believe that the product or the goods are of Italian origin, and including the use of false or de-

ceptive company trademarks in accordance with the regulations on misleading commercial practices, without prejudice to the provisions of art. 49 bis. The offenses are committed from the presentation of the products or goods in customs for release for consumption or free circulation to retail sale. The deceptive indication of the goods can be remedied administratively with the removal of the signs or figures or whatever induces the consumer to believe that it is a product of Italian origin at the care and expense of the offender. The false indication of origin or source of products or goods can be remedied administratively through an exact indication of the origin or removal of the wording – made in Italy -.”

For its part, paragraph 49 bis of the cited art. 4 expressly provides that: “False indication includes the use of a trademark on the part of the owner or licensee in such a way as to induce the consumer to believe that the product or goods are of Italian origin in accordance with European regulations on origin, without being accompanied by precise and clear indications on the foreign origin or source or, in any case, information sufficient to avoid any misunderstanding on the consumer’s part of the effective origin of the product, or without being accompanied by certification, provided by the owner or licensee of the trademark, regarding the information which, under their re-



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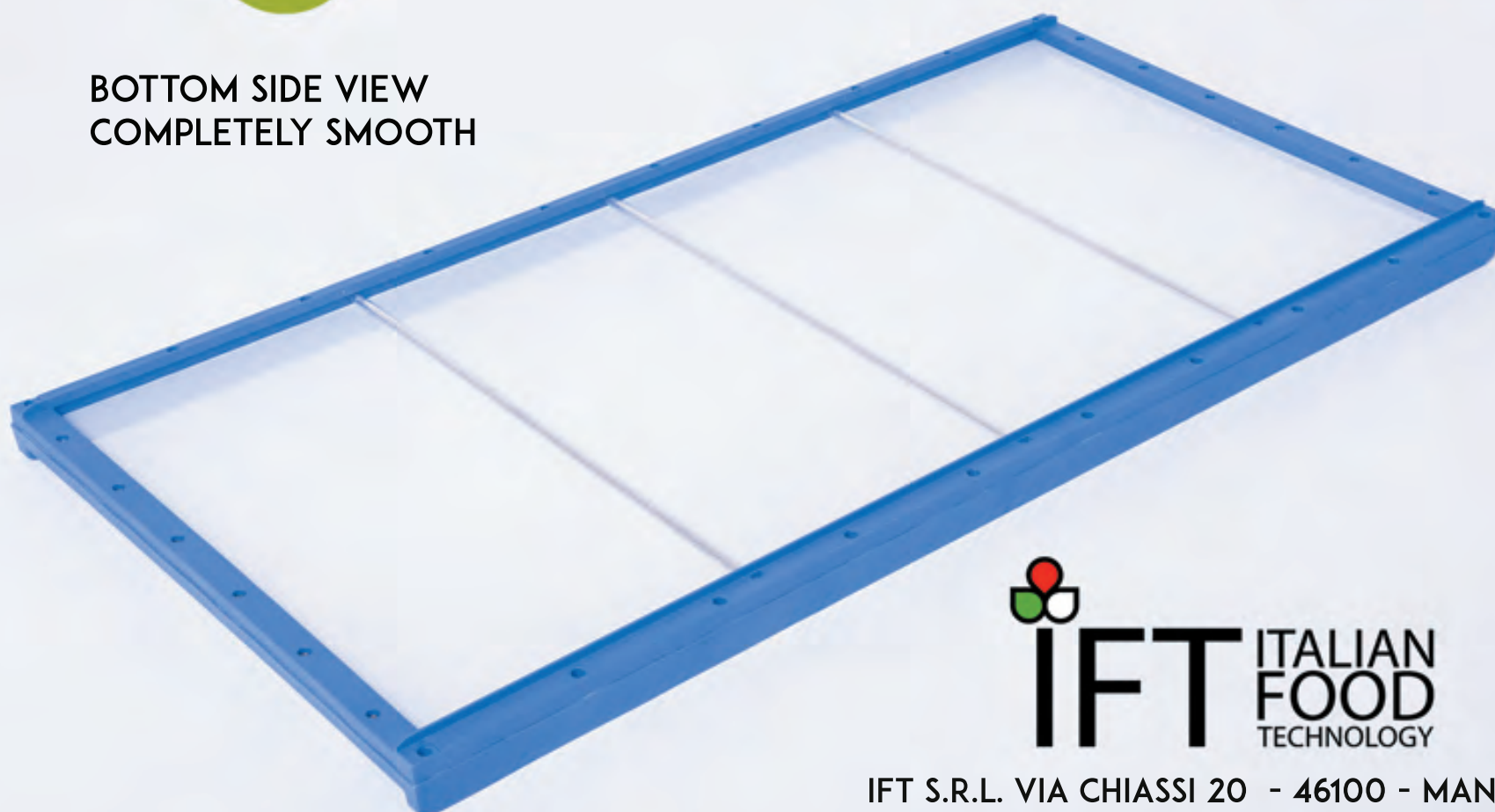
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sponsibility, are provided during the marketing phase regarding the effective foreign origin of the product. For food products, effective origin is the place of cultivation and rearing of the agricultural raw material used in the production and in the preparation of the products and the place where substantial transformation took place. The offender is punished with an administrative sanction of euro 10,000 to euro 250,000.”

To summarise, therefore: the misleading use of the trademark on the part of Italian companies is decriminalised, while the unlawful use of the wording “Made in Italy”, already punished as false indication of origin by art. 4, paragraph 49 of Law no. 350 of 2003, remains a criminal offense.

The jurisprudence of the Supreme Court has clarified the confines between the criminal offense (art. 4, paragraph 49, Law no. 350 of 2003) and the administrative

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offense (art. 4, paragraph 49 bis of the same law).

The first case applies in the event of false or misleading indications or the deceptive use of signs or figures for which the consumer is induced to believe that the goods are of Italian origin.

Conversely, in the event that the consumer is misled in error regarding the origin of the products due to insufficient or imprecise, but not misleading, indications of source, this is considered as an administrative offense.

So, to take an example, the presentation at customs of clotheshorses of Chinese origin bearing the national flag on the packaging and with indications only in Italian, including the wording “quality product tested according to European regulations” constitutes a criminal offense.

In application of the aforementioned principles, it has been decided to consider the importation from abroad of products bearing a legal “Gamma Italy” trademark in the absence of precise indications on the exact source or the declaration of intent to provide such information in the marketing phase, misleading also an expert consumer regarding the effective origin of the product, as an administrative offense and not a crime.

Depending on the case, a criminally punishable offense may be committed:

- a. Through the use of a “Made in Italy” stamp on products or goods not originating from Italy;
- b. Through the use of labels of the type “100% made in Italy”, “100% Italy”, “all Italian”, or “full made in Italy” to mark products not entirely designed, planned, processed and packaged in our country, constituting the alleged aggravated crime of “false indication” of origin, punishable pursuant to the combined provisions of art. 16, paragraph 4 of Decree Law no. 135 of 2009 and of art. 517 of the penal code;
- c. Through “the use of signs, figures and otherwise” that induces the consumer to believe, also in the presence of the indication of origin or source of the goods, that the product is Italian, referring, by way of example, to cases in which signs and figures are affixed on the product in such a way as to obscure, physically and symbolically, the label relating to origin, making it effectively poorly visible and not identifiable with a brief examination of the product, constituting in this case an example of “deceptive indication” punishable pursuant to art. 517 of the penal code.
- d. Through the misleading use of the company trademark on the part of the owner or licensee businessman, so as



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“to induce the consumer to believe that the product is of Italian origin pursuant to European regulations regarding origin”, unless the products imported or exported are accompanied by “clear” indications on the exact geographical origin or on their foreign source or the owner of the trademark or their licensee undertake to affix such indications during the marketing phase.

Having clarified the legal framework, the Court has dealt with the case in point, holding, as mentioned, the claims of the defence to be without grounds.

The Court of Genoa has correctly argued and held the establishment of *fumus commissi delicti* and has held the indications affixed on the package to be false, so as to mislead the consumer regarding the source of the goods and establish the offense as criminally relevant.

In particular, the judges came to this decision on the basis of the fact that, while the relevant elements relating to the geographic area – Naples Italy – and to the producer company “produced and packaged for produced for [...] Gragnano Naples Italy” were clearly visible on the package, the wording “made in Turkey” was placed under the best-by date, poorly legible and affixed with a different and easily removable ink.

Said indications, therefore, were found to be suitable for generating in the public (and, that is, in the average consumer of the specific sector) the conviction that the goods were of Italian origin or had been subject to at least a substantial processing in our country, a circumstance excluded by the appellant that claims that the entire production cycle occurred in Turkey.

To conclude, it is necessary to underline, as anticipated, that the Supreme Court does not enter into an assessment of the case as described, but limits its attention to examining the correct reasoning of the Court of Genoa in the precautionary phase.

We don’t know, therefore, if the alleged offender has been condemned or not for breach of the laws as contested.

A number of general considerations can be made in conclusion.

In the case in point, the wordings of the packets of pasta produced abroad (Turkey) for the Italian pasta factory and intended for a foreign market were held to be in abstract suitable for misleading the public for breach of art. 4, paragraph 49, of Law no. 350 of 2003.

The preventive confiscation was ordered on the basis of this fact.

The Court held that the *fumus commissi delicti* of the crime hypothesised by the Public Prosecutor was sufficiently proven.





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The Supreme Court confirmed the provisional precautionary measure of the Court. If provisionally, said prognosis can be supported by the reasoning set out above, it is necessary to point out that, from a procedural point of view, the establishment of the crime as attributed to the acting judge is guided by the different and more severe principle of “guilt beyond all reasonable doubt”.

This principle obviously requires more substantial proof than what apparently emerges from the described case.

## Notes

1. Art. 517 of the penal code: the sale of industrial products with misleading signs

Whoever puts on sale or otherwise puts into circulation original works or industrial products with national or foreign names, trademarks or distinctive signs aimed at misleading the buyer regarding the origin, source or quality of the work or product, is punished, if the fact is not provided for as a crime by another legal provision, with imprisonment of up to two years and with a fine of up to twenty thousand euros.

Art. 4, paragraph 49 states: “The importation and exportation for trading purposes or the marketing or commission of acts directed in an unambiguous way towards the trading of products bearing false or deceptive indications of source or origin constitutes a crime and is punished pursuant to art. 517 of the penal code. False indication includes the printing of “Made in Italy” on products and goods not originating from Italy according to European regulations on origin; deceptive indication, also if the foreign origin or source of the products or

goods is indicated, includes the use of signs, figures or anything else that can induce the consumer to believe that the product or the goods are of Italian origin, and including the use of false or deceptive company trademarks in accordance with the regulations on misleading commercial practices, without prejudice to the provisions of art. 49 bis”.

Paragraph 49 bis, for its part, provides as follows: “False indication includes the use of a trademark on the part of the owner or licensee in such a way as to induce the consumer to believe that the product or goods are of Italian origin in accordance with European regulations on origin, without being accompanied by precise and clear indications on the foreign origin or source or, in any case, information sufficient to avoid any misunderstanding on the consumer’s part of the effective origin of the product, or without being accompanied by certification, provided by the owner or licensee of the trademark, regarding information which, under their responsibility, is provided during the marketing phase regarding the effective foreign origin of the product.

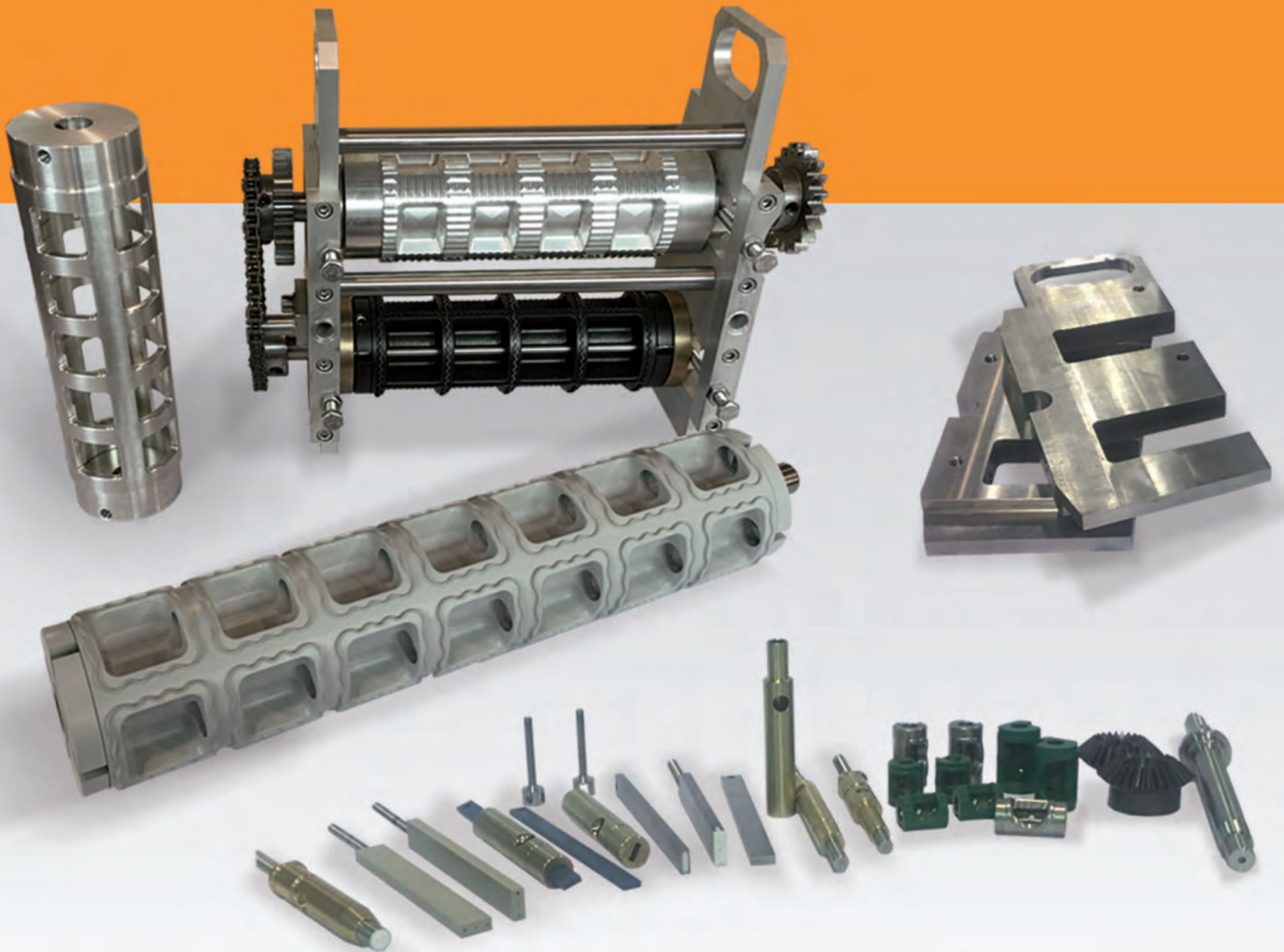
For food products, effective origin is the place of cultivation and rearing of the agricultural raw material used in the production and in the preparation of the products and the place where substantial transformation took place. The offender is punished with an administrative sanction of euro 10,000 to euro 250,000.”

3. Art. 6 of the penal code

Whoever commits a crime in the territory of the state is punished according to Italian law. The crime is considered as committed in the territory of the State when the action or omission comprising the crime occurs there, in whole or in part, or an event occurs that is the consequence of the act or omission.



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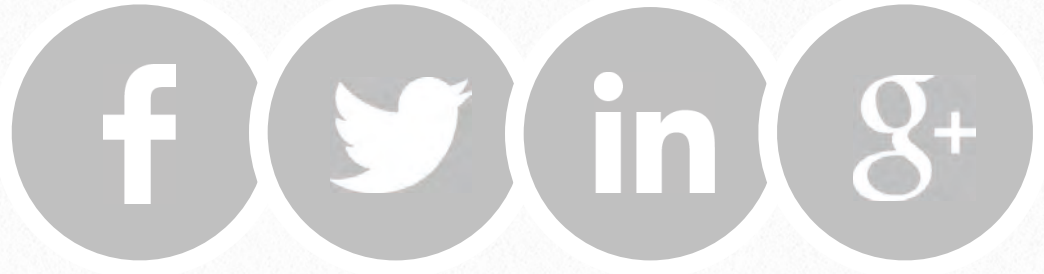
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# 5



## Minus sign in 2019 for global sowing and harvesting of durum wheat

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Low-cost wheat, with Canadian “durum” prices at their worst for five years, means that only three-quarters of the land dedicated to growing durum wheat in 2018 will be used for it this year.

This is the forecast of Statistics Canada, which envisages a 25% reduction in sowing, estimated this year at 1.88 million hectares, against 2.5 million hectares in 2018. A quick about-turn that will bring the Canadian harvest to around 4.9 million tonnes, i.e. a drop of 15% in year-on-year production. An evaluation that incorporates the return to a normal yield level, in line with the historical average, after the sharp deterioration experienced last summer, which will only partially compensate for the drastic fall in investments.

Impact on demand will, however, be minor. For the world’s leading producer and exporter of durum wheat, effective availability during the 2019/2020 season will only drop by 4 percentage points, notwithstanding the double digit reductions in sowing and harvesting. A considerably resized production yield will, in fact, be combined with carry-over stock of 2 million tonnes, 40% more than that stored at the start of the previous season. A maxi-stock that brings the “total supply” close to 7 million tonnes, a quantity sufficient to cover both the domestic consumption of 910,000 tonnes and an export requirement of 4.5 million.

The season will close with 500,000 tonnes less wheat stored in Canadian grain warehouses (compared with the volume at the start of the season), in an international context that should bring about a mini-recovery in prices. According to the analysts, FOB quotations of Canadian wheat will range from 235-265 euro per tonne, with the prospect of an increase in prices of around 8%.

It should also be noted that the expectation of a rise in international prices is also based on the forecast of a drop in world production of durum wheat, estimated at around 4 percentage points, with the analysts setting the figure at 36.8 million tonnes.

Global dynamics also reflect a cut in the overall sowing areas, with a loss of hectares that will have negative repercussions also on North American and European harvests.



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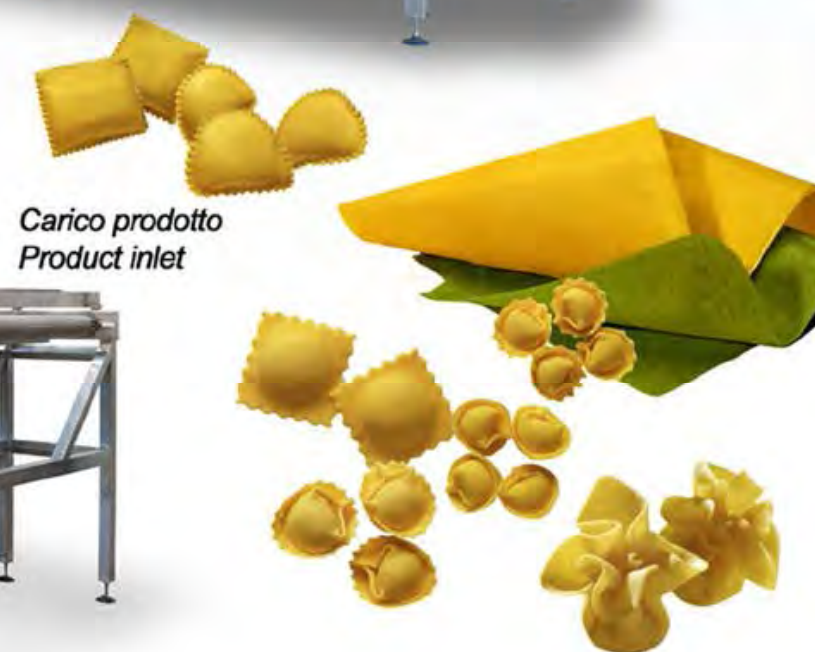
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**Table 1 DURUM WHEAT, FORECAST 2019/2020 HARVEST IN THE EU-28**

<b>EU-28</b>	<b>2018/19</b>	<b>2019/20</b>	<b>Variation</b>
Area (,000 ha)	2,580	2,420	-6.2%
Average yield (100 kg/ha)	33.4	33.4	0%
Production (,000 t)	8,625	8,093	-6.2%
<b>ITALY</b>	<b>2018/19</b>	<b>2019/20</b>	<b>Variation</b>
Area (,000 ha)	1,305	1,260	-3.4%
Average yield (100 kg/ha)	32	32.5	1.6%
Production (,000 t)	4,176	4,095	-1.9%
<b>FRANCE</b>	<b>2018/19</b>	<b>2019/20</b>	<b>Variation</b>
Area (,000 ha)	354	325	-8.2%
Average yield (100 kg/ha)	50.4	55	9.1%
Production (,000 t)	1,784	1,788	0.2%
<b>SPAIN</b>	<b>2018/19</b>	<b>2019/20</b>	<b>Variation</b>
Area (,000 ha)	372	350	-5.9%
Average yield (100 kg/ha)	36.2	26	-28.2%
Production (,000 t)	1,347	910	-32.4%
<b>GREECE</b>	<b>2018/19</b>	<b>2019/20</b>	<b>Variation</b>
Area (,000 ha)	390	320	-17.9%
Average yield (100 kg/ha)	18	19	5.6%
Production (,000 t)	702	608	-13.4%
<i>Source: Coceral, forecast March 2019</i>			





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The global supply balance for the 2019/2020 season does not, in any case, presage imbalances at a fundamental level, with a demand which, also considering the stocks, could settle just under 47 million tonnes (700,000 less compared to the last season), maintaining a positive margin compared to a consumption stabilised at 37.6 million tonnes.

The mosaic of world harvests is composed, as previously mentioned, of other negative elements. For the same reasons connected with the disappointing trends in prices, durum wheat has also lost its appeal in US farmers' investment programs, ceding land to other cereal crops. Choices that have already been made and which will deduct from the estimate of this year's harvests a quantity of 200,000 tonnes, bringing the new production figures for the star and stripes to 1.9 million.

On the other side of the Atlantic, a preliminary appraisal on sowing and harvesting in Europe has been made by Coceral, the European association representing trade in cereals, with headquarters in Brussels.

General conditions, particularly as regards commerce - observe the analysts - have not been favourable, in the EU, to the sowing of durum wheat, the "competitiveness" of which has also been penalised by other cereal productions, not least of which soft wheat and barley.

From the initial evaluations, at an EU level, a drop of 2.4 million hectares for the 2019 sowing season is likely, corresponding to a loss of at least 6% of planting land.

Under normal climate conditions, no considerable deviation in yield is expected compared to last year's levels. A circumstance that shifts the entire 6% reduction in sowing onto the EU harvesting result, evaluated this year at little above the threshold of 8 million tonnes.

Italy, leading producer in Europe and second in the world, with 1.26 million hectares (a year-on-year drop of 3%) will reach little more than 4 million tonnes this summer, compared to 4.2 tonnes in 2018.

Durum wheat has also lost hectares in Spain, where the combined effect of a 6% cut in sowing and a lower yield is likely to reduce the harvest by over 30%, pushing it down to 910,000 tonnes.

The only country bucking the trend among the EU's major producers is France, whose production prospects for 2019 are just slightly below 1.8 million tonnes. A minus sign is also predicted for Greece, from which the Coceral analysts expect a loss of around 13%, with an estimated harvest of little more than 600,000 tonnes.



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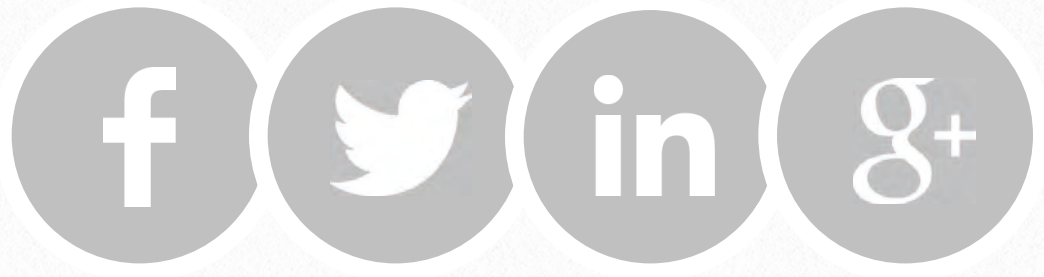
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6



# Tuttofood confirms its status as international agri-food hub

Press release



**32 countries have already confirmed their presence, with Spain, Greece, Portugal, USA, UK and China in the lead**





**For information**

[www.tuttofood.it](http://www.tuttofood.it)

Tuttofood, scheduled to take place at Fiera Milano from 6 to 9 May, is becoming an increasingly international hub for the agri-food and high-quality food system, capable of creating synergies and shortening the distances between countries around the world.

Bringing together the best of Italian know-how and putting it in touch with top buyers, while favouring the presence of foreign countries and companies on the Italian market. To date, 32 countries have already confirmed their presence at the next edition, with important and numerous groups from Spain, Greece, Portugal, the United Kingdom, China and the USA. Confirming the international character of the event, the U.S. Department of Agriculture recently issued an important acknowledgement that certifies Tuttofood as the only Italian event in the agri-food sector capable of guaranteeing an effective contribution to U.S. exports.

The ability to evolve, innovate and naturally expand product offerings is the focus of the 2019 edition. Tuttowine, the space dedicated to wine has been born, created in partnership with UIV- Unione Italiana Vini, allowing buyers to explore products from both the food and beverage sectors during their time at the fair. New areas are also dedicated to nutritional traditions, Tuttokosher and Tuttohalal, consolidating the event's international character.

The new product categories will be included in the sectors of the most consolidated areas of the event. Focus on the delicatessen and gastronomy world at Tuttodeli, the world of preserves with Tutogrocery; Tuttosweet, offering confirmation for the world of sweets and oven-baked products, while Tuttopasta consolidates the dry pasta segment with the expansion of historical producers and a focus on fresh pasta. This edition has two new entries Tuttofrozen and Tuttoseafood, sections dedicated to frozen food and fish products, and the two his-





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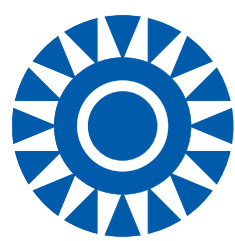
toric pavilions dedicated to dairy products and fresh and cured meats, Tuttodairy and Tuttomeat, are characterised by increasing product innovation.

Evolution Plaza, the digital transformation village which - together with the well-known Retail Plaza - looks to innovation in the agri-food sector, makes its debut. This is a new area, representing an opportunity to analyse how 4.0 technologies can help the growth of the sector. Evolution Plaza is also the space where companies and research centres can experiment and dia-

logue with each other. The partnership with Netcomm, the Italian e-commerce consortium, takes advantage of this opportunity, bringing the Food Lab eCommerce platform to this area.

Considerable investment in highly qualified Italian and international buyers, thanks also to the contribution of ITA/ICE Agency on several key markets. The focus on high-profile buyers that target quality contacts is also reinforced by the agreements made by Tuttofood with important overseas associations such as Restaurant Canada,





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*Piemonte Nord*





which brings together Canadian restaurants and away-from-home chains, and the Specialty Food Association, the most important association in the sector in the USA.

Tuttofood will be partnering Milano Food City from 3 to 9 May 2019, the week of quality food held at the same time as the event.

The seventh edition of Tuttofood is scheduled to take place at Fiera Milano from 6 to 9 May 2019.

For more information: [www.tuttofood.it/en](http://www.tuttofood.it/en).

The following vertical sectors are confirmed at Tuttofood 2019: Tuttodigital, Tuttodairy, Tuttomeat, Tuttofrozen, Tuttosweet, Tuttopasta, Tuttobakery, Tuttogrocery, Tuttodeli, Tuttooil, Tuttogreen, Tuttoregional, Tuttowine, Tuttoworld, Tuttoseafood, Tuttodrink, Tuttohealth, Tuttohalal and Tuttokosher as well as the co-location event Fruit Innovation.



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Produttori  
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*"Il Presidente"  
Giovanni Rama*



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- Allargare il mercato italiano ed inserirsi in quello europeo con l'incentivazione e l'adozione nel mondo della pasta fresca dei **"piatti pronti o da cuocere a base di pasta fresca"**.
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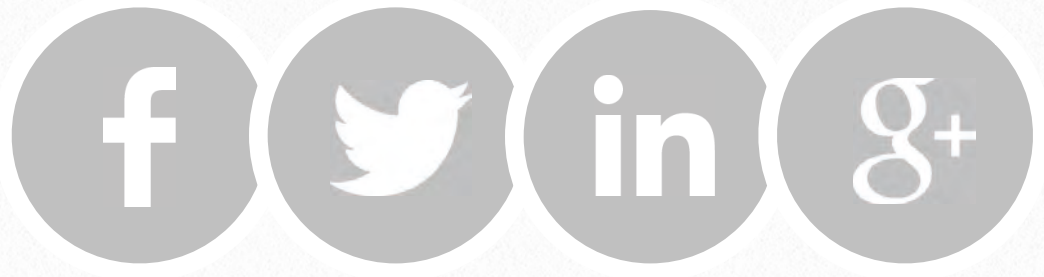


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# Pastificio Barbieri

Editorial staff



Pastificio Barbieri, the historic Correggio-based pasta factory, is about to celebrate its 100th anniversary. The factors behind the success of the business, that has strong ties to the local territory and tradition, are continuous research and product innovation.





**For information  
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Barbieri**

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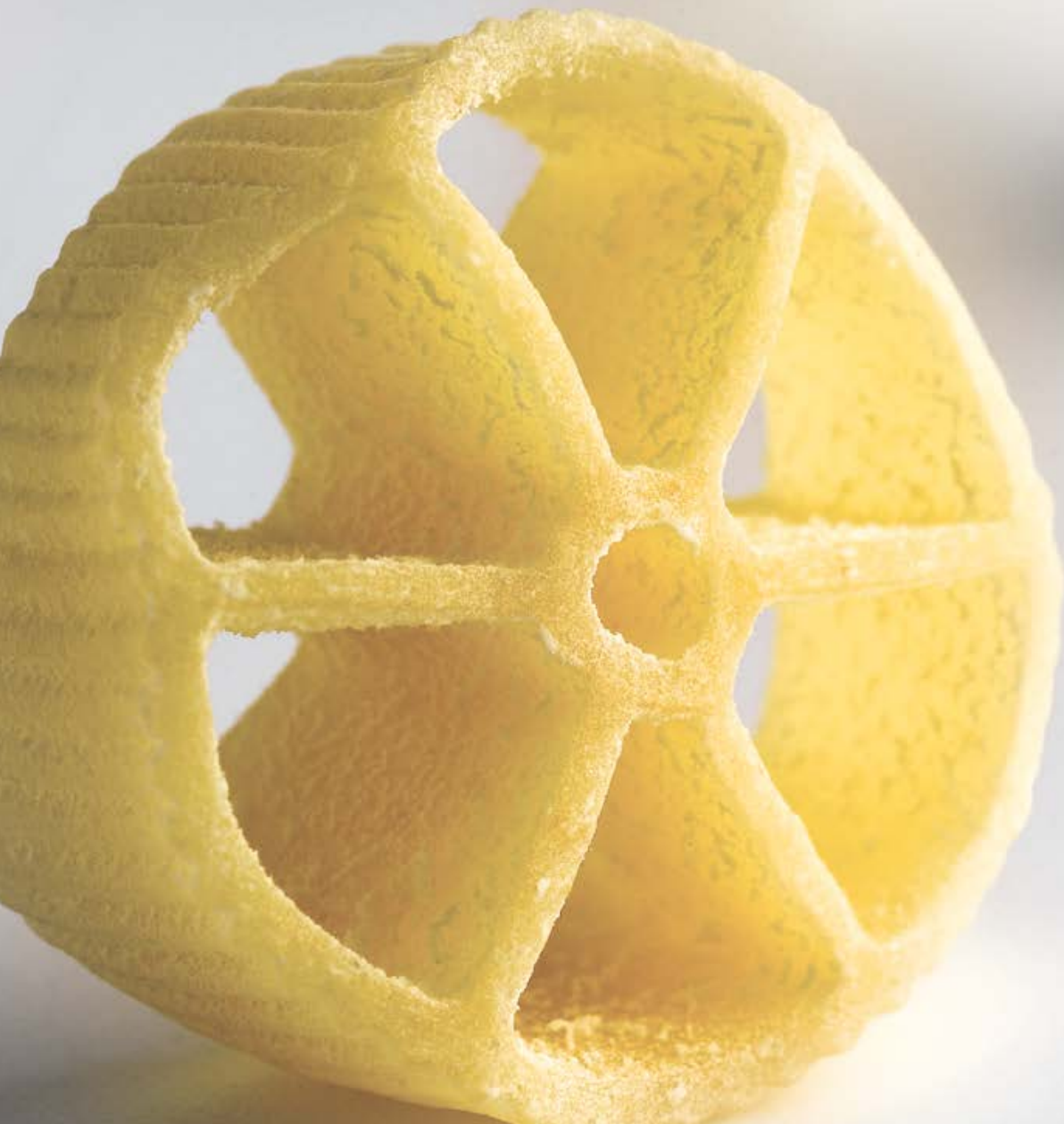
[www.pastificiobarbieri.com](http://www.pastificiobarbieri.com)

Next year at Pastificio Barbieri they will be celebrating their 100th anniversary. But in that part of the world, there is no way they will be looking back nostalgically. The ancient, Correggio-based pasta factory, that makes tradition and local ties an essential part of its own work philosophy, is most definitely looking to the future and to innovation. The work of relaunching the company, founded almost a century ago by the five Barbieri brothers, begins precisely with new products, the result of continuous experimentation and a strong orientation towards not just the domestic market but also the international one. For a company that exports 50% of what it produces, and that has been present in dozens of foreign countries for some time, it couldn't be any other way. There is one shape that is particularly dear to Pastificio Barbieri - the Gramigna. It is a short, curly pasta, wonderful to behold, and acknowledged as being typical of Reggio Emilia, available in several versions such as the organic, paglia e fieno, organic wholemeal or 100% Italian wheat. Although it isn't particularly well-known, Gramigna has an important history and, contrary to what one may think, it originated as an egg pasta. Barbieri can proudly lay claim to the fact that it has given it a new form, offering it also as a spirulina pasta, in a perfect mix, precisely, of innovation and tradition. In reality spirulina, an algae with endless qualities, is a new element proposed in many of the shapes present in the Barbieri catalogue. The one used by the pasta factory has the additional advantage of being produced in the excess waters from the electricity generators of the Novellara-based company, Sabar. And so it is that this environmentally friendly algae, with its excellent nutritional properties, and in this case also locally sourced - being produced roughly ten minutes from Correggio - is the element that makes the difference in a traditional product that, in this case, is in and of itself an al-



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ready excellent product. It also attracted the attention of *IlSole24* newspaper that, as a result of the collaboration with *Food* magazine, in recent days, has included Barbieri's spirulina pasta among the so-called rising stars, in the group of ten most innovative products in Italy.

This company's strong points don't end here. The new range, with six eggs per kilo, is produced exclusively using free-range eggs. This range comes in different shapes, but the nested variety of the Emilia region is undoubtedly the most characteristic and typical. In an age of low-calorie diets, where weight ranges must, by necessity, be low, Barbieri, in

sharp contrast to the majority of other pasta manufacturers, is offering smaller sizes that are decidedly more practical. Overall, the shapes are primarily those of the tradition of the region of Emilia, such as Tagliatelle, Pastine, Penne, Fusilli, Tortiglioni, with a high protein content and all rigorously bronze drawn, so that the sheet has a surface with the roughness that tradition demands. This, in fact, is the essential characteristic in order to retain and exalt sauces and condiments and for tasting authentic flavours. On offer there is also a range made from Italian wholemeal flours and one made with organic, and in some cases with both in the same product.






**I.P.O.**  
International Pasta Organisation

**INTERNATIONAL PASTA ORGANISATION (IPO)**  
Fondata a Barcellona il 25 ottobre 2005  
Formalmente costituita a Roma in occasione del World Pasta Day 2006 (25 ottobre 2006)



## MISSION

L' IPO è un'organizzazione no-profit che si propone di:

- Educare ed informare i consumatori, i media, gli operatori nel settore alimentare e della nutrizione in merito alle proprietà della pasta, evidenziandone i pregi dal punto di vista nutrizionale, gastronomico ed economico.
- Promuovere il consumo e la cultura della pasta a livello internazionale.

## ATTIVITÀ

- Organizza e promuove eventi di comunicazione a favore della pasta, come la Giornata Mondiale della Pasta ed il Congresso Mondiale della Pasta.
- Raccoglie e diffonde a livello internazionale informazioni nutrizionali, dati statistici e documentazione riguardanti la pasta.
- Con il supporto di uno Scientific Advisory Committee, attualmente formato da 25 esperti provenienti da 17 paesi, porta avanti iniziative di educazione alimentare, attraverso la pubblicazione di materiale informativo, l'organizzazione e la partecipazione a conferenze e seminari, curando inoltre rapporti con i media.



## MEMBRI

Attualmente aderiscono all'International Pasta Organisation 25 membri (tra i quali due Federazioni europee, UNAFPA e SEMOULIERS) in rappresentanza di 18 Paesi (Argentina, Belgio, Brasile, Canada, Cile, Colombia, Costa Rica, Francia, Guatemala, Iran, Italia, Messico, Portogallo, Spagna, Turchia, Stati Uniti, Uruguay, Venezuela).

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Even though it is an industrial pasta factory its production processes are, in the main, artisanal. Drying, for example, is a long process and with the use of static wooden trays.

A large part of Barbieri pasta is intended for the medium to high level Ho.Re.Ca sector and is present with the same quality in major retail outlets, including in private labels. Retail packaging comes in





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250 grams on a tray and 500 grams in a box. These differ when it comes to catering, where weight ranges are in 3kg or 5 kg. The company has, for some time now, had BRC, IFS and even ISO 2200:2205 certification, because for this historic pasta maker, attention to the environment is a must. It's no coincidence that within the company it is not just re-branding that's taking place, with an eye firmly fixed on the future, but above all there is research on increasingly environmentally friendly wrapping and packaging that is respectful towards the planet and ecosystems.

And when it comes to projects, everything is almost in place within the company for the start of an e-commerce system. The online requests, above all for products containing spirulina, are many and the Correggio-based pasta factory will not keep people waiting.



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**ingredients**



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8



# “Gragnano città della pasta” is officially a Protection Consortium

Press release



The publication in the Official Gazette of the Italian Republic, confirms the importance of an industry producing 3,500 tonnes of pasta a day that is constantly growing.



In addition to the million tonnes produced every year from local bronze dies, Gragnano (Naples, Italy) is now also, according to Italian law, truly the “city of pasta”. With the publication on the Official Gazette of the Italian Republic on 18 January 2019, the Consortium, with its 14 producer members, formally becomes a Protection Consortium and obtains a new tool that will help this totally unique production environment grow still further. Every day 3,500 tonnes of PGI pasta are produced in an area of less than fifteen square kilometres, the equivalent of 3 million dishes, of which 75% are intended for export.

The boom in Italian products in recent years has seen the Consortium’s turnover grow 7.2% in the two year period 2016/17, with a positive trend that also continued in 2018. These are figures that now rank Gragnano 11th among Italy’s PDOs and PGIs, by value.

A success that is also based on the unique entrepreneurial structure of the location. The €300 million turnover of the members of the Gragnano Città della Pasta Consortium is divided across the small artisanal concerns and top players in the market. United in defending the values of artisanship and tradition, it is now regulated by the stringent standards of PGI that protects a production that has been linked to this place since the 16th century. It is only here that the dough of durum wheat semolina and water, taken from the local aquifer, become Pasta di Gragnano PGI. And it is from here that all the major innovations in the Italian industry began, starting with the celebrated bronze dies.

“The publication in the Gazette, that officially recognises the Consortium, will give our business new impetus. This important result is a huge incentive to work even harder to promote Pasta di Gragnano and the City of Pasta both in Italy and abroad” said Massimo Menna, the Consortium’s President.

To understand the importance of what has been published in the Official Gazette, it is worth recalling the work done by the Consortium to obtain the tools increasingly intended to protect this national asset. The first meeting of the historical companies, the descendants of the first pasta factories of 500 years ago, was in 2003, with the awarding of Protected Geographical Indication status coming in 2013. After having obtained the title of Promotion Consortium in 2018, the members began the process for the next step, i.e. the title of “Protection Consortium”. A function already undertaken, moreover, by the producers overseeing





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the entire chain, but also recognised by the Italian Ministry of Agricultural, Food and Forestry Policies and Tourism (MI-PAAFT). So much so, in fact, that in November 2018 the CSQA Certification body obtained the authorisation, from the MI-PAAFT, to carry out compliance checks, increasing both its inspection activities and quality controls.

The publication in the Official Gazette, that recognised the Consortium, pursuant to Article 14, paragraph 15 of Law no. 526 of 1999, concluded this process and added a further tool to render checking more effective.

## **Gragnano Città della Pasta Consortium**

The Gragnano Città della Pasta Consortium was founded in 2003 from the union of historic producers of Pasta di Gragnano. In 2013 the joint action of the members led to their obtaining Protected Geographic Indication status, the first EU quality recognition assigned to pasta in Italy and in Europe. Its mission today is that of protecting and relaunching the Pasta di Gragnano PGI product, both in Italy and around the world, making it an ambassador of the Made in Italy label and of a sustainable, healthy and natural lifestyle. PGI ties the pasta of Gragnano still further to

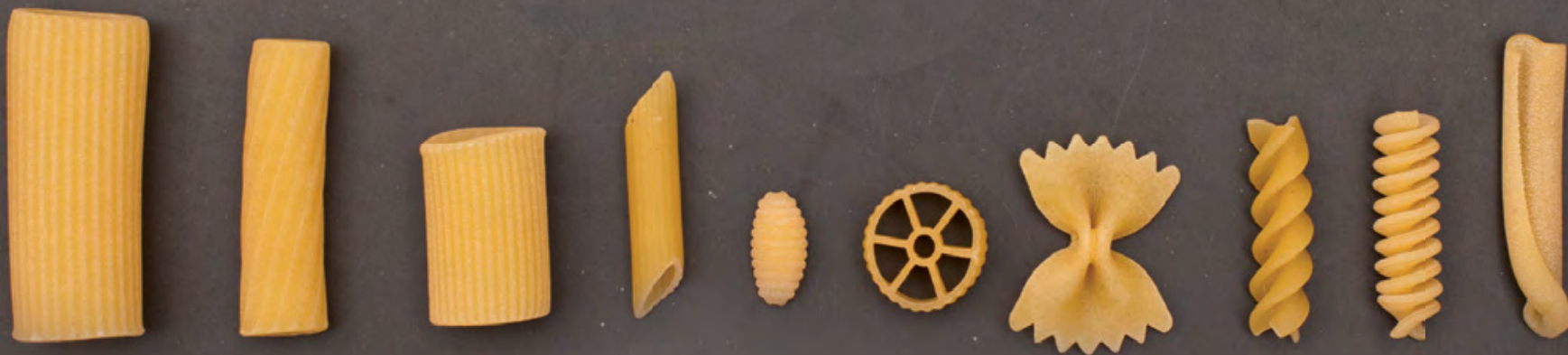
its territory, where only the distinctive micro climate of this upland, located between the sea and the Lattari mountains, and the local pure spring water, create a unique product when they are combined with durum wheat semolina. These are elements that the people of Gragnano have been harnessing to produce pasta since the time of the Romans, creating the first family run pasta factories in the 16th century and in 1845 obtaining the greatest privilege, from Ferdinand II of Bourbon, to provide all the long pasta to the court, an act that formally marked the birth of the City of Pasta.

The consortium currently represents 14 manufacturers for a total turnover of €300 million, a daily output of 3,500 tonnes, of which 75% is intended for export.

The members of Gragnano Città della Pasta are: Pastificio Garofalo, Pastificio Liguori, Pastificio Antonio Massa, Pasta d'Aragona, Pastificio D'Aniello, Il Re della pasta, Premiato Pastificio Afeltra, Il Mulino di Gragnano, La Fabbrica della Pasta, Antiche Tradizioni di Gragnano, Pastificio Di Martino, Pastificio dei Campi, Cooperativa Pastai Gragnanesi and L'Oro di Gragnano.



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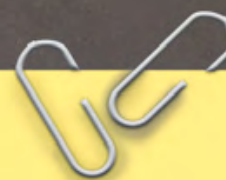
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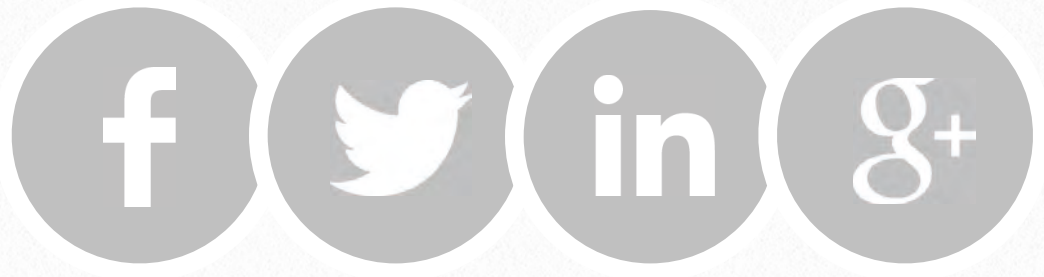
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Union of Organizations of Manufactures of Pasta Products of the E.U.

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## ***Proceedings of the Pastaria Festival 2018.***

Juri Piceni  
Exmedia

# **Gluten-free market: what are the opportunities for growth for food sector companies?**



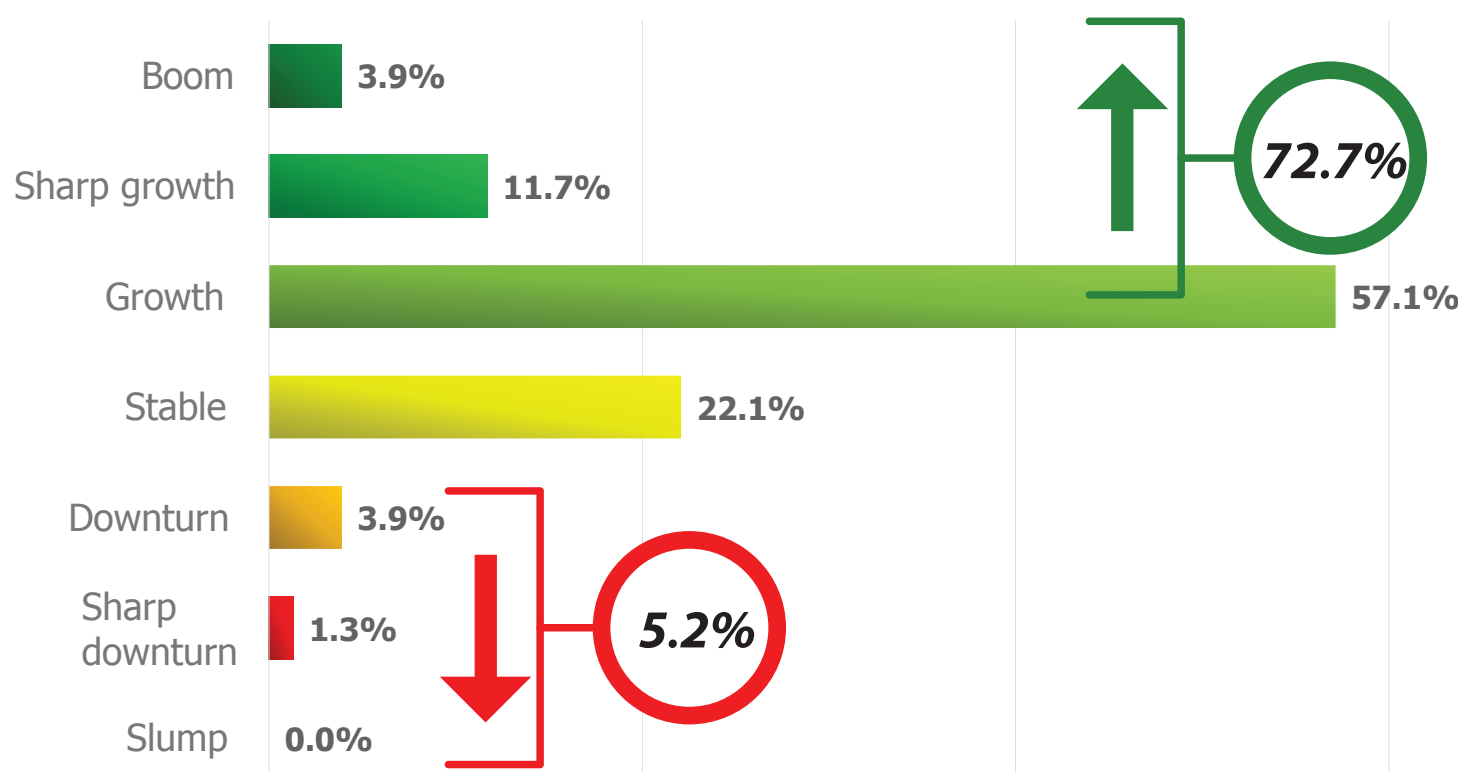
**A summary of Juri Piceni's address to the conference entitled *Pasta: trends and consumption in Italy, in Europe and around the world, in 'away from home' and retail sales channels*, held as part of Pastaria Festival 2018.**



## HOW MUCH HAS YOUR COMPANY'S TURNOVER CHANGED (LAST FINANCIAL YEAR) COMPARED TO 3 YEARS AGO?



Variation in turnover over last 3 years



Gluten Free Expo, the international trade fair dedicated to the gluten-free market and products, organises a National Observatory on the gluten-free market each year, in order to study its dynamics and anticipate its trends.

On the basis of the data collected from the National Observatory of 2017 and presented during the Pastaria Festival 2018, 53.2% of the companies interviewed do not produce exclusively gluten-free or “free from” products, a share that has grown by 3.7% compared to 2016, while 46.8% of the companies interviewed declare that their production is exclusively gluten-free.

The degree of satisfaction of the food companies operating in the sector is also increasing: considering a scale of 1 to 9, i.e. from not at all satisfied to extremely satisfied, the degree of satisfaction in the 2015 Observatory was 6.7, in 2016 it rose to 7.0, while in 2017 it reached 7.3, a sign that the growth of the gluten-free market in recent years is also reflected in the satisfaction of the companies who have invested, and continue to invest, resources in this segment. Compared to the last 3 years, in fact, 72.7% companies have also seen their turnover increase, while only 5.2% have noticed a downturn.





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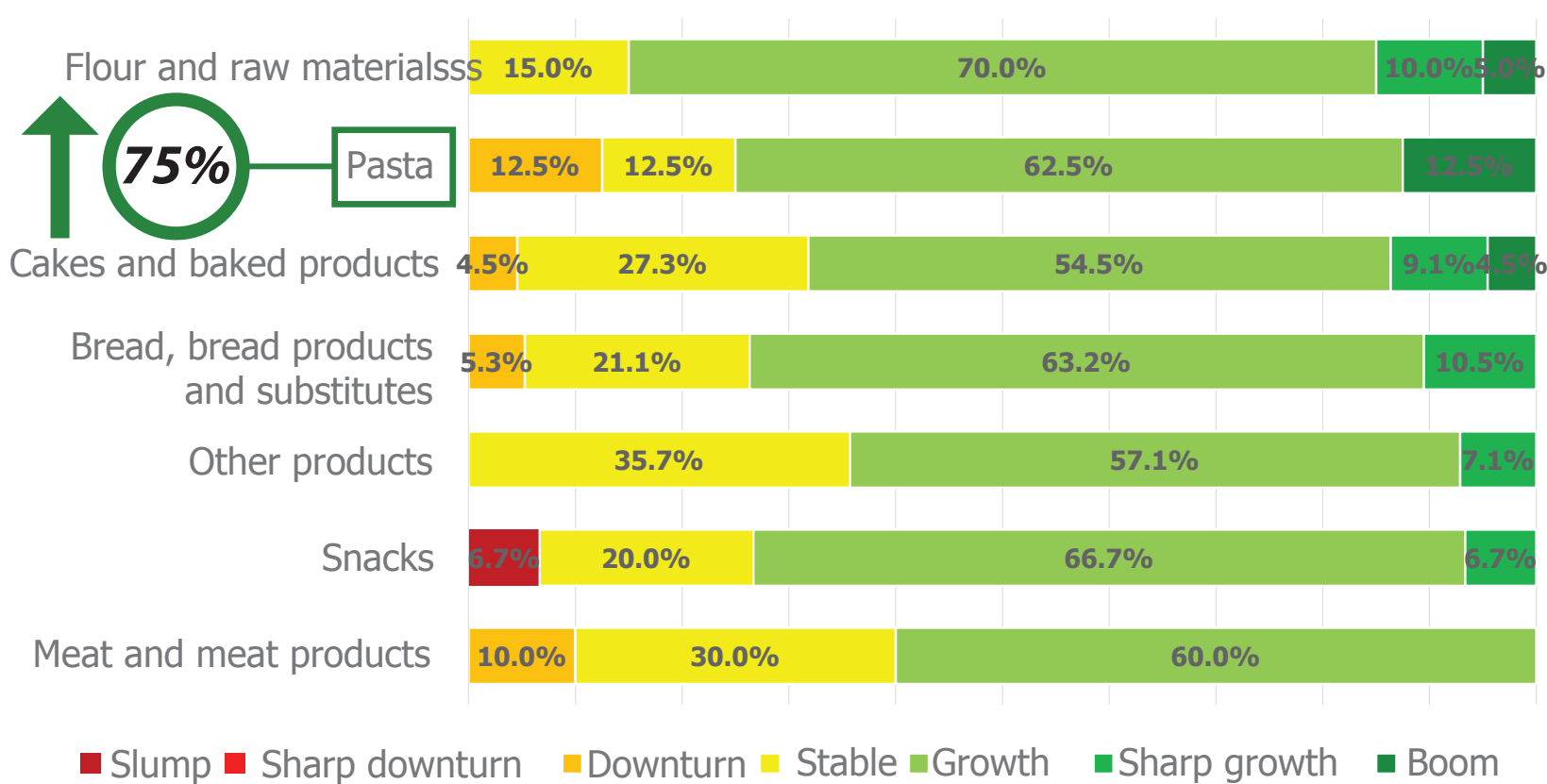




# HOW DO YOU VIEW THE FUTURE TRENDS OF THE VARIOUS SECTORS IN WHICH YOU OPERATE OVER THE NEXT 3 YEARS?



Sector trends



And it is, indeed, the pasta sector, with all its variations, that - according to the sentiments of the interviewees - will enjoy the greatest growth over the next three years, thanks also to innovation in terms of ingredients: the gluten-free pasta sector makes much greater use of innovative raw materials such as legumes, and alternative cereals to the classic corn and rice-based products.

As regards product distribution, the preferred sales channel chosen by these companies is still the specialised sales outlet.

A sector that undoubtedly has great potential for future development, and which

industry will have to take into due consideration, is the hotel-restaurant-café (Ho.Re.Ca.) sector.

It is no coincidence that over the last few years Ho.Re.Ca. professionals have dedicated greater attention to offering consumers a wider variety of safer, better, gluten-free products. This attention is having repercussions on food sector companies which are having to respond in terms of products, packaging and suitable equipment.

The opportunities for growth are clear and numerous for the entire gluten-free pasta supply chain, both for companies dealing with finished products, and for those dedi-



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\* reserved for pasta producers

cated to machinery or raw materials.

The latest trends in the sector will be examined in depth at the important trade fair from 16 to 19 November 2019 at Rimini Fiera. Here Foodnova, the network dedicated to the new food requirements, which was initially presented during the 2018 edition of the Gluten Free Expo and Lactose Free Expo, will make its début. This year the fair will include four separate exhibitions: the already consolidated Gluten Free Expo and Lactose Free Expo and the new entries Expo Veg, an exhibition dedicated to vegetarian and vegan food choices and the Ethnic Food Expo, dedicated to ethnic food products.





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