Pastaria international

The professional information network magazine for pasta manufacturers

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2019


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Pastaria International DE
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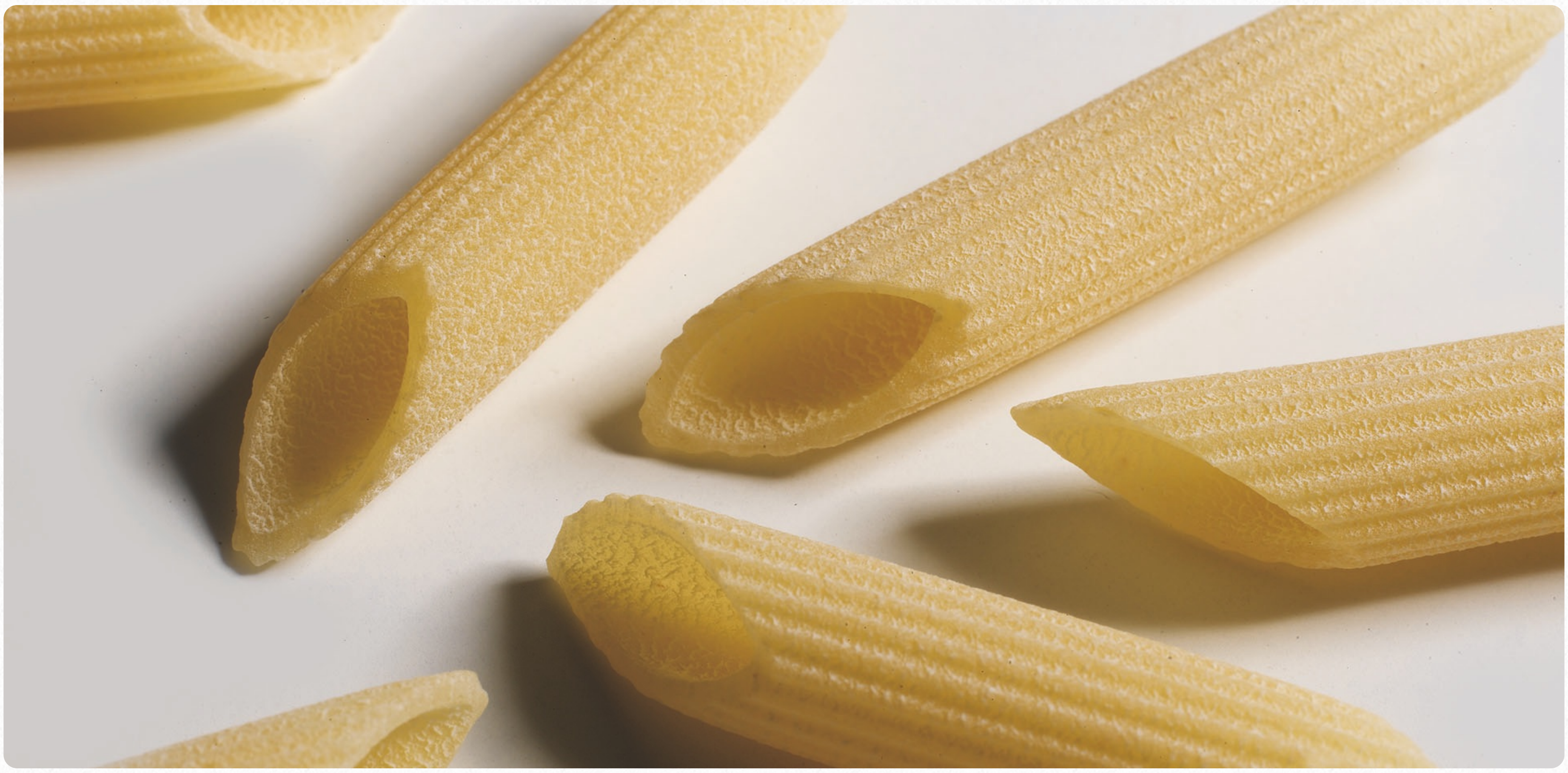
September



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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
ROC no. 23238

EDITOR-IN-CHIEF
Lorenzo Pini

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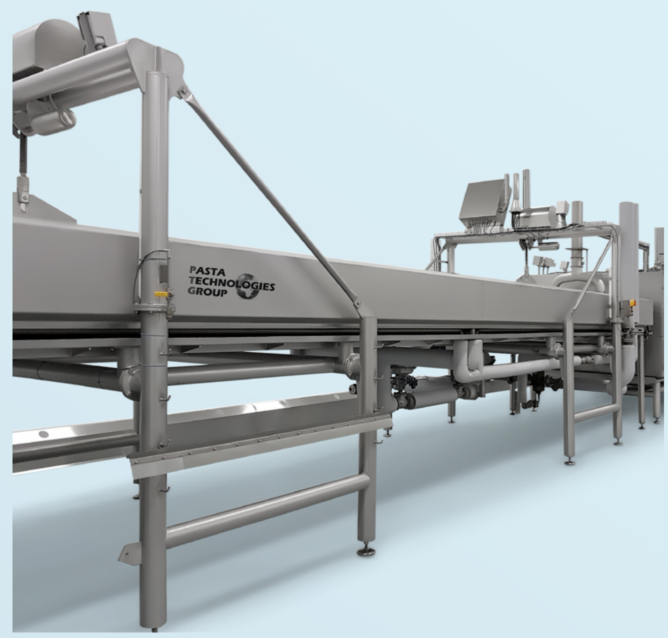

Pasteurizer mod. PV

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Cannelloni forming system

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The information and professional update resources that are part of the Pastaria network are freely distributed without charge thanks to the collaboration and support of leading companies operating on an international level to supply ingredients, semi-processed products, equipment and systems for manufacturing fresh/dried pasta, gnocchi and ready meals.

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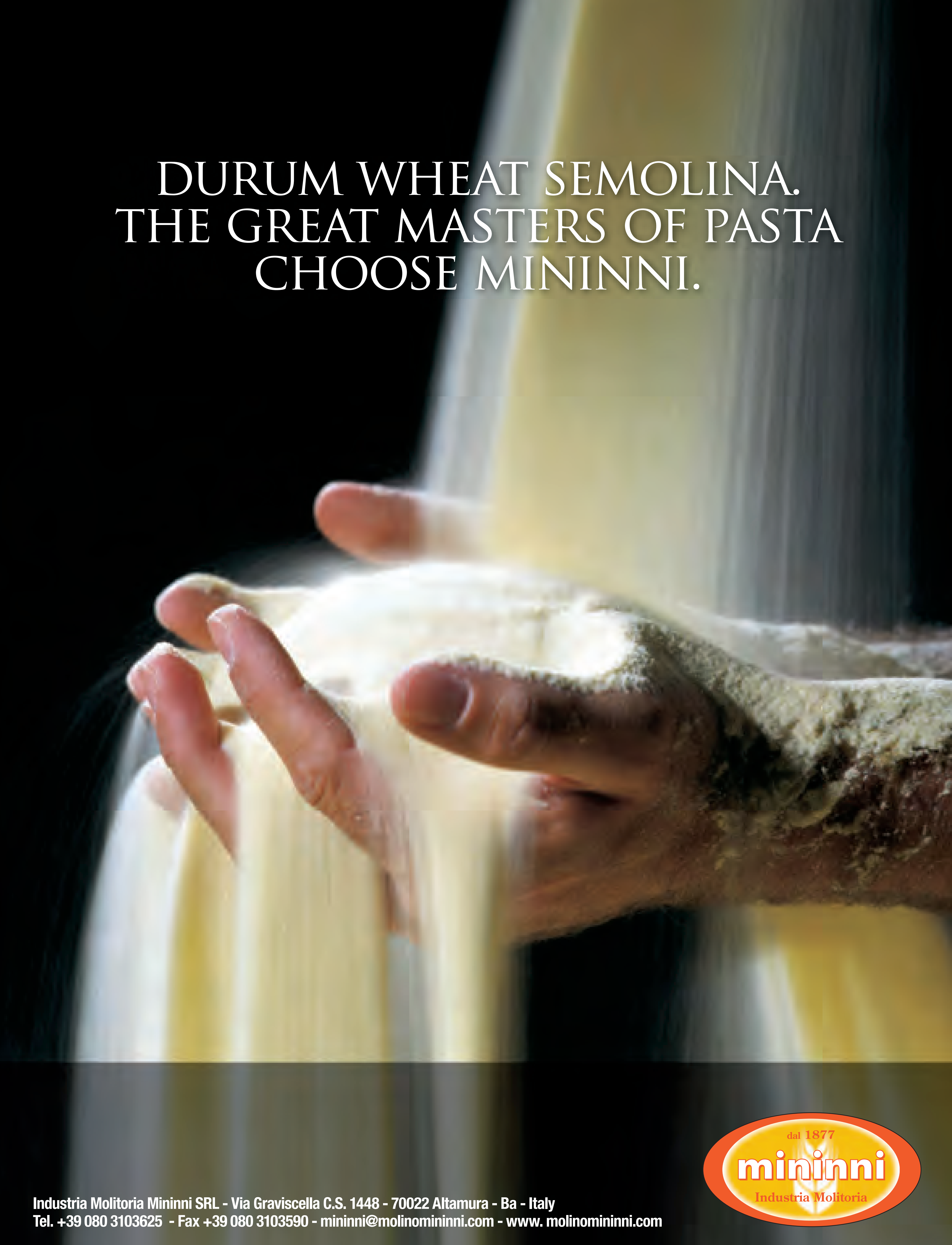
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1

Pastaria Festival 2019, the complete programme

Editorial staff

The third Pasta Festival (Parma, 27 September 2019) has lots of conferences, workshops, laboratories and presentations. These pages contain the complete programme of the event. Time for the last remaining places for participating is running out.

There is great anticipation ahead of the third Pastaria Festival that on 27 September, will bring together, in Parma, pasta factories, associations, universities, professional bodies, experts and companies in the supply chain, for a day of free meetings, conferences, workshops and exhibitions that create a unique moment of professional training and updating on activities associated with pasta production.
Participation in the event will be open for the first time ever to international manufacturers, that, thanks to a simultaneous English language translation service, will be able to attend many of the scheduled conferences. The presence of Carl Zuanelli (Nuovo Pasta Productions) and Delia Murphy, the new President and Director of the National Pasta Association, the body that brings together the USA's pasta manufacturers, has already been confirmed.
The awarding of the Pastaria Prize for the best Master's and Doctoral theses on research applied to pasta and the meeting of the Unione Italiana Food Pasta Group (formerly AIDEPI) during the course of the event represent other significant new features of the forthcoming Pastaria Festival, the programme for which is published here below.

The programme

8:30-9:00 am
Admission of participants
Room: Auditorium Foyer
WELCOME COFFEE
To access the event it is necessary to have registered beforehand (by 26 September until all places are filled) and to be in possession of a regular ticket (free).

9:00-10:00 am
Opening of proceedings
Paolo Barilla (Barilla G. e R. Fratelli), Gherardo Bonetto (APPF), Riccardo Felicetti (Unione Italiana Food), Fabio Fontaneto (APPAFRE), Lorenzo Pini (Pastaria).
Room: Auditorium (1)

10:00 am - 5:00 pm
Exhibition by suppliers of shaping machines and desks, in the exhibition area
Room: Gilda (6)

10:00 am - 5:00 pm
Information desk on the problems associated with the business of pasta manufacturing
Organised by the Association of Food Technologists of Veneto and Trentino Alto Adige (OTAV), Piedmont and the Aosta Valley


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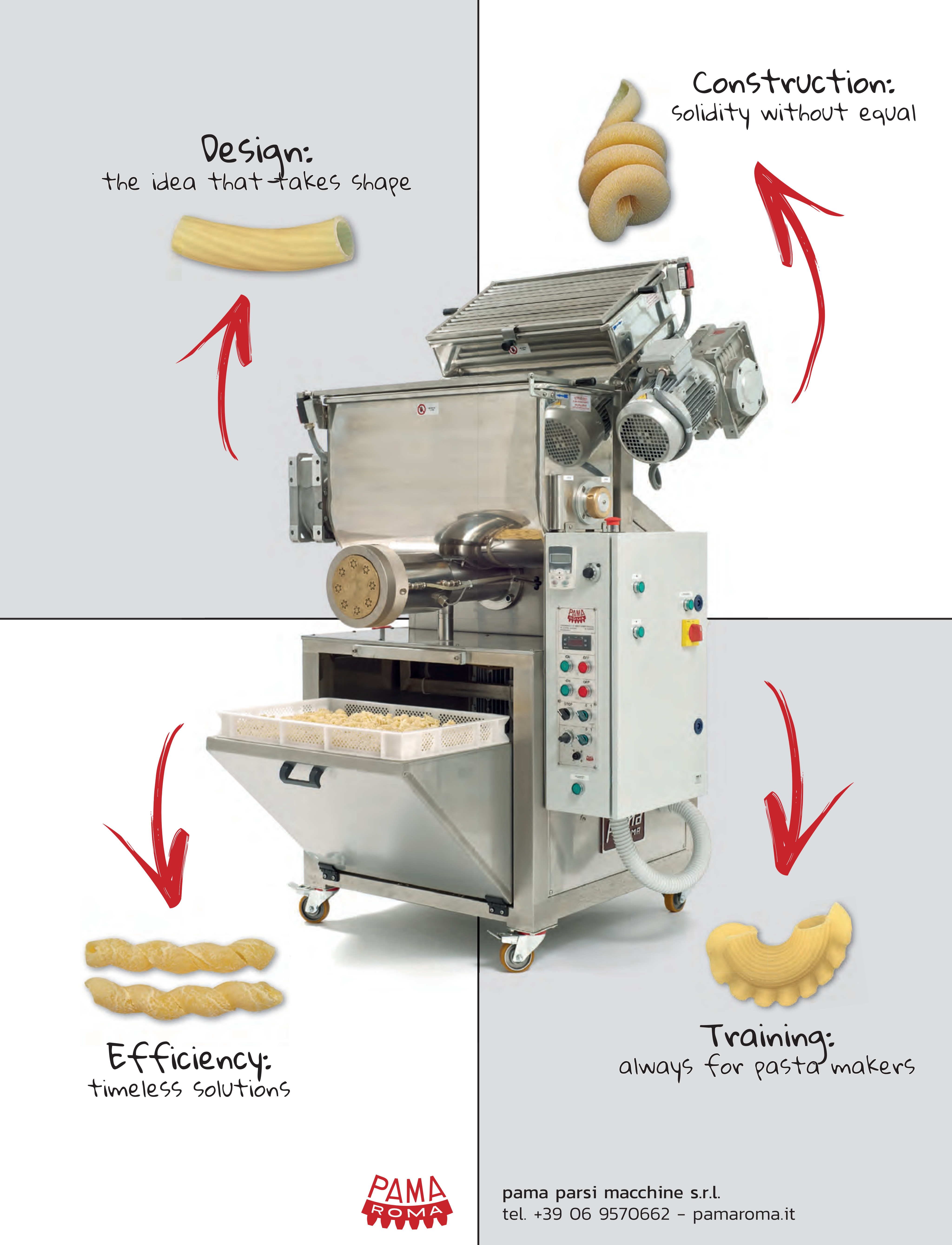
(OTAP), Emilia Romagna, Tuscany, The Marches and Umbria (OTAERAGG).
Room: Venere C (10)

10:00 am - 12:00 pm
Gluten-free pasta and ready meals: production and new distribution formats

- Maurizio Vezzani (Zini SpA), Mara Lucisano (University of Milan), The *Gluten Free project 2.0: Innovative technologies for the production of fresh gluten-free pasta and new Street Food distribution formats*;
- Cristina Alamprese (University of Milan), *Technological quality of fresh filled pasta, pre-cooked and deep-frozen*;
- Carola Cappa (University of Milan), Monica Laureati (University of Milan), *Whole grain gnocchi with red rice and buckwheat: nutritional aspects, behaviour during cooking and sensory quality*;
- Andrea Casson (University of Milan), *Analysis of environmental impact of traditional vs. gluten free deep-frozen gnocchi;*
- Alessandra Marti (University of Milan), Monica Laureati (University of Milan), *Pre-cooked, deep-frozen dried pasta: behaviour during cooking and sensory quality;*
- Roberto Beghi (University of Milan), *Designing an innovative format for the distribution of gluten free ready meals*.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Moderator: Cristina Alamprese (University of Milan).
International[1] – academic-based[2] conference.
With the collaboration of: DeFENS.
Room: Afrodite (7)

10:15-10:35 am
Companies & Innovation Space
- Sabina Caroli (Kerry Ingredients & Flavours Italia), Michele Vezzoli (Kerry Ingredients & Flavours Italia), *Filled pasta: longer lasting freshness and flavour*.

Room: Fedora (2)

10:30 am -1:00 pm
The Board of Unione Italiana Food Pasta Sector
A closed meeting. Participation reserved for member pasta factories.
Room: Venere A (8)

10:30 am -12:30 pm
Pasta: trends and consumption in Italy, Europe and around the world in the retail and 'out of home' channels
- Sara Beretta (Nielsen), *The first course in Italy: evolution and prospects*;
- Matteo Figura (NDP Italia), *Trends and consumption of pasta in the Italian and European 'out of home' segment*;
- Juri Piceni, *The market of gluten free pasta*;
- Stefano Galli (Nielsen), *Pasta, emerging consumer dynamics and opportunities for growth on the global market*.

Moderator: Antonio Cellie (Fiere di Parma)
International[2] conference prepared by Pastaria Centre for Economic Research.
Room: Manon (3)

10:45 am -12:00 pm
Pasta and marketing
- Guia Pirotti (Bocconi University), *The organisational resilience of pasta manufacturers*;
- Leonardo Cei (University of Padua), *Consumers and pasta. Health, environment or tradition?*

Moderator: Guia Pirotti (Bocconi University).
Pastaria Workshop prepared by the Pastaria Centre for Economic Research.
Room: Venere B (9)

10:45-11:05 am
Companies & Innovation Space
- Giovanni Vedani (Rivestimenti Speciali), *Flooring and coverings with the highest hygiene standards*.

Room: Fedora (2)

11:00 am -12:30 pm
Fresh pasta: between safety and the regulatory, old and new

- Silvia Gonzaga (Logos Avvocati Associati), *Origins of the primary ingredient according to Regulation 775/2018: state of the art*;
- Elena Santin, Nicola De Battisti (Rana Spa), *Presidential Decree 187/2001 and fresh pasta: considerations and thoughts to reflect upon*;
- Stefano Zardetto (Voltan Spa), *Fresh pasta, product storage temperature and shelf life: methodological approach*.

APPF Conference

Room: Carmen (5)

11:00 am - 1:00 pm

From the field to the table: state of the art of research applied to pasta

- Maria Cristina Messia (University of Molise), *Functional pasta: strengths and weaknesses*;
- Giovanna Visioli (University of Parma), *Precision agriculture for the production of quality pasta*;
- Alessandra Marti (University of Milan), Maria Am-

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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.

WORLD PASTA DAY
25 October

- 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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ipo@internationalpasta.org - www.internationalpasta.org

brogina Pagani (University of Milan), *Whole grain pasta: the duel between raw material and process*;

- A. Cimini (Tuscia University), *M. Moresi (Tuscia University), Eco-sustainable cooking of pasta: development of an innovative cooking system*;
- Antonella Trezzi (Rana SpA), *Gluten-free production in a traditional fresh pasta production plant: feasibility study through risk analysis*;
- Marco Dalla Rosa (University of Cesena), *Chemical-physical changes during the storage of fresh egg pasta in MAP.*

Moderator: Gabriella Pasini (University of Padua).

International[1] – academic-based[2] conference.

Room: Amelia (4)

11:15-11:35 am

Companies & Innovation Space

- Giacomo Tosi (Landucci), *The extrusion process: the secret to success lies in the maintenance of the dies.*

Room: Fedora (2)

12:00-1:00 pm

New food requirements: protein pasta, the passage from tradition to innovation

- Riccardo Sartirana (MartinoRossi Spa), *Innovation in the pasta market: controlled*


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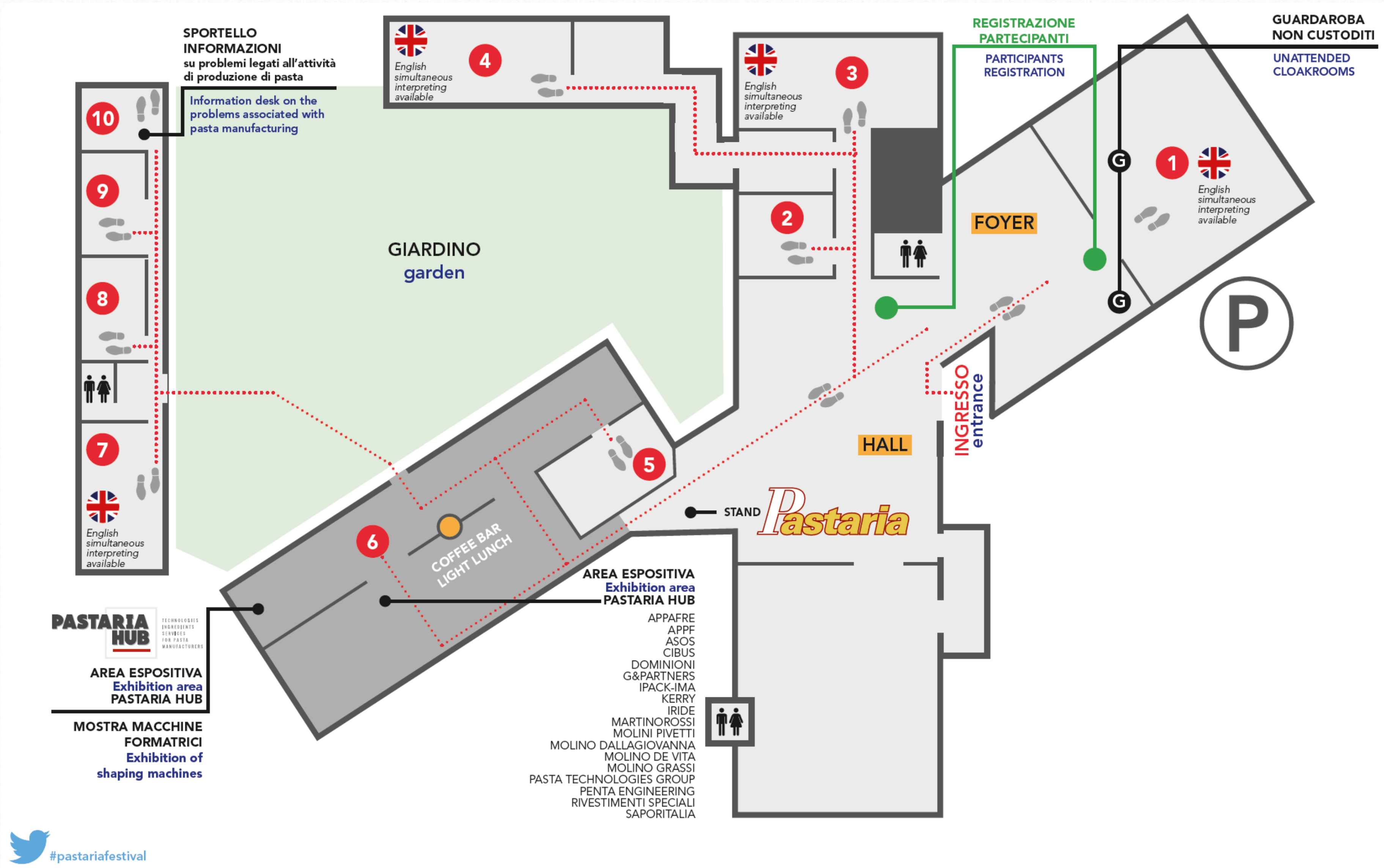

supply chain and legume flours;

- Elena Vittadini (University of Camerino), *New food requirements: the importance of an adequate protein content in the diet*;
- Maria Pia Gandossi (Foodnova), *Trends in the pasta market: focus on protein pasta.*

MartinoRossi Conference.

Room: Afrodite (7)

1:00-2:00 pm

Light lunch

Room: Gilda (6)

2:00-4:00 pm

The new challenges in pasta packaging: sustainability and safety

- Luciano Piergiovanni (University of Milan, PackLAB), *The prospects for packaging materials for fresh pasta, in light of new food requirements and regulatory restrictions*;
- Sara Limbo (University of Milan, PackLAB), *Fresh filled pasta: the role of gas and light in packaging in extending shelf life*;
- Fabio Licciardello (University of Reggio Emilia), *The role of packaging in the the*

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sustainability of the food supply chain: the case of pasta;

- Francesca Mostardini and Tommaso Pedrazzini (Pack.co srl, Milan), *Analysis of the problems in the approach to screening of fragments or breakdown products of accepted and therefore not declared substances*;
- Elena Torrieri, (Federico II University of Naples), *Effects of surface properties on the performance of edible films and from biopolymers*.

Moderator: Luciano Piergiovanni (University of Milan, PackLAB).
International[1] – academic-based[2] conference.
Room: Manon (3)

2:00-2:30 pm
Food frauds: a challenge for guaranteeing food safety
- Valeria Di Siero (OTAP).

Problem solving in collaboration with OTAERAGG, OTAP, OTAV.
Room: Fedora (2)

2:15-4:15 pm
Pasta: ingredients, health and nutrition
- Barbara Simonato (University of Verona), *Fortified pasta and nutritional characteristics*;
- Francesco Visioli (University of Padua), *Dealing with food phobias. Carbohydrates as a paradigmatic example*;
- Donato Angelino (University of Parma), *Pasta as a vehicle of healthy compounds: the Made in Italy project;*
- Marika Dello Russo (Institute of Food Sciences National Research Council of Avellino), *The nutritional values of Italian pasta*;
- Giuseppe Pede (University of Parma), *Evaluation of the nutritional quality of pasta: focus on the Glycemic Index*;
- Gianluca Giuberti (Università Cattolica del Sacro Cuore, Piacenza), *Gluten free pasta: strategies for improving the nutritional profile.*

Moderator: Francesca Scazzina (University of Parma).
International[1] – academic-based[2] conference.
Room: Amelia (4)

2:30-4:30 pm
Product innovation: from tradition to the market
- Fabio Fontaneto (APPAFRE), *Greetings*;
- Laura Gavinelli (University of Milano-Bicocca), *Competing by innovating. A reflection on Italian SMEs*;
- Giovanni Peira (University of Turin), *Quality systems as an enhancement tool: the role of Geographical Indications in the pasta sector*;

- Maria Antonietta Dessì (Cna Agroalimentare Sardinia), *The safeguarding of the traditional product and the need for innovation*;
- Vito Arra (I sapori d'Ogliastra di Vito Arra), *Sebadas of Sardinia and Culurgionis of the Ogliastra region: two traditional products with an innovative look*;
- Rosa Carissimi (Poker Srl), *Ravioli from the tradition of Bergamo for fast lunch breaks*;
- Matteo Delfino (Delfino Fratelli Snc) *Innovation: frozen*;
- Luca Azzi (Fontaneto Srl), *The process for obtaining PGI for the Piedmont-style agnolotto, from the idea to the product's launch on the market: a delicate balance between tradition and consumers' constantly evolving tastes*;
- Leonardo Santarelli (La Romagna Srl), *Return to the origins: the lamination of the pasta sheet*;
- Federico Gobita (Casanova Food Srl) *Gluten and lactose-free fresh pasta: the constantly evolving needs and new trends of the market, with particular attention on quality and food safety*;
- Paola Freccero (CNA Agroalimentare), *APPAFRE? Because yes*.

Moderator: Virna Soncin (APPAFRE)
APPAFRE Conference.
Room: Carmen (5)

2:30-3:00 pm
The management of allergens in the manufacture of fresh pasta: notions for a correct methodological approach to avoiding the cross-contamination during the process
- Stefano Zardetto (OTAV).

Problem solving in collaboration with OTAERAGG, OTAP, OTAV.
Room: Fedora (2)

2:45-3:45 pm
Pasta: scientific truth versus fake news
- Emanuele Marconi (Italian Association for Cereal Science and Technology - AISTEC), *Technological and qualitative aspects of pasta: from science to nonsense*;
- Daniela Martini (University of Parma), *Pasta consumption in the fake news era*.

Moderator: Emanuele Marconi (AISTEC).
Internationa[1] – academic-based[2] conference.
With the collaboration of: AISTEC.
Room: Afrodite (7)

3:00-3:30 pm
Pasta factory pests: getting to know them in order to keep them under control
- Michele Mascaro (OTAERAGG).

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Room: Fedora (2)

3:15-4:00 pm

Food commodities, scenarios and risk factors

Workshop prepared by Pastaria Centre for Economic Research.

Room: Venere B (9)

3:30-4:00 pm

Materials and objects in contact with foods in the pasta factory: recurring criticalities and their management

• Serena Pironi (OTA Nazionale).

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Room: Fedora (2)

4:15-5:00 pm

Pastaria Prize Award Ceremony

Room: Venere A (8)

5:00 pm

Close of proceedings

Partners

The Pastaria Festival – entitled Sharing know how on pasta manufacturing is an event organised in collaboration with the Unione Italiana Food, APPAFRE (Italian Association of Small/Medium and Artisanal Fresh Pasta and Gnocchi Manufacturers), APPF (Italian Association of Fresh Pasta Producers) and AISTEC (Italian Association for Cereal Science and Technology) associations, together with prestigious universities and various regional associations of food technologists.

The steering committee

The Steering Committee of Pastaria Festival consists of a Scientific Committee composed of Cristina Alamprese (University of Milan), Marco Dalla Rosa, (University of Bologna), Daniele Del Rio (School for Advanced Studies on Food and Nutrition) Gabriella Pasini (University of Padua), Luciano Piergiovanni (University of Milan), Guia Pirotti (Bocconi University), Emanuele Marconi (University of Molise), Francesca Scazzina (University of Parma), and an Advisory Committee composed of Federica Calcagno (Fontaneto), Roberto Ciati (Barilla), Nicola De Battisti, (Rana), Sergio De Gennaro, (Pastificio Lucio Garofalo), Francesca Sica (La Molisana), Stefano Zardetto (Gruppo Voltan). The Steering Committee is coordinated by Lorenzo Pini, editor-in-chief of Pastaria.

The venue

Pastaria Festival takes place at the Hotel Parma & Congressi in Parma, located in via Emilia Ovest, 281/A.

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• *by taxi from the central railway station*
the distance is between 7.5 km and 9 km, depending on the route taken. Journey time is roughly 15-20 minutes.

To take part

Attendance to Pastaria Festival is free and reserved for pasta manufacturers, with mandatory registration until all places are filled.
Suppliers of equipment, systems 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).

To sign up

Pasta manufacturers can register for the event via the Eventbrite platform, or by following the link on pastaria.it.
The registration link can be requested by sending an email to info@pastaria.it, taking care to provide all you company's details.

Notes

1. Simultaneous English translation of the conference
2. Programme drawn up by the Pastaria Festival Steering Committee.

2

Pastaria Festival 2018: with so many registrations, it is heading for a sell out

Editorial staff

Myriad registrations at the third edition of Pastaria Festival, on 27 September, in Parma. About 100 pasta-makers signed up for the event, and not just from Italy.

Four hundred people are expected at the third Pastaria Festival to be held on 27 September. Parma will be the venue for the sector's operators and the leading players in the supply chain who will have the opportunity to exchange knowledge and expertise about pasta production, free-of-charge. The number of registrations for the 2019 edition should confirm the extensive presence of operators interested in the different initiatives that make up the event's packed programme.
A high level of registrations in terms of positions within the firms, as reflected in the presence of owners and production, quality assurance, R&D, purchasing, sales and marketing managers, to whom the various scheduled activities, with the issues to be examined in detail, are addressed.
Just few days from the completion of the registration process, here is the list of the pasta-makers registered for the event, which includes leading brands on national and international markets as well as a wide variety of types of products and companies, from small artisan producers to major manufacturers:

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To take part

Attendance to Pastaria Festival is free and reserved for pasta manufacturers, with mandatory registration until all places are filled.
Suppliers of equipment, systems 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).

To sign up

Pasta manufacturers can register for the event via the Eventbrite platform, or by following the link on pastaria.it.
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3

Commodity price observatory 3/2019

Pastaria Centre for Economic Research

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

Even though they are “overflowing” in liquidity thanks to the ultra-expansive policies of the central banks, the markets are currently labouring to find the impetus to relaunch commodity prices, particularly in the food sector. For the time being, only safe-haven goods such as precious metals (particularly gold) are weathering the storm, since they always tend to be in demand during phases of prolonged uncertainty such as the present moment.

Analysts seem nonetheless to agree that there has been a deterioration in the general economic situation, an opinion that seems almost to be taken for granted at a European level and considered reliable, if with some reservations, also at a global level.

Against this backdrop, the prices of staples on cereal commodity markets, in the post-harvest situation characterising the start of the autumn season, herald an overall prudent approach for wheat, but with differing trends for soft wheat and durum wheat.

In Europe, forecasts confirm an increase in the EU’s production of soft wheat, which the European Commissions statistical office quantifies at 142.7 million tonnes, corresponding to a year-on-year rise of 10.8%. In contrast, the durum wheat harvest has fallen by over 9% and is estimated to be under the threshold of 8 million tonnes this year. Two markedly conflicting trends, which justify the two price trends: rising for durum wheat and falling for soft wheat. It should, however, also be mentioned that the different trends in quotations are primarily motivated by end-harvest projections in terms of stockpiles, which are at a historical high worldwide for soft wheat, but in sharp decline for durum wheat, with forecasts at their lowest for five years.

Further complicating the interpretation of the economic trends are the daily “stop and go” reports on the trade dispute between the USA and China, most of which appear in brief announcements on Twitter.

Short “tweets” which are nudging the financial and currency markets into unexplored territory, relegating the fate of major commodities, such as the barrel of crude oil, to semantic algorithms, which prove to be more incisive than the actual reconfiguration of the trade flows and expectations on staples.

Suffice it to say that the exchange on social media of accusations and threats on new tariffs between Washington and Beijing have pushed the exchange rate of the Chinese currency to over 7 yuan per dollar for the first time in 11 years. A devaluation not without reprisals (verbal for now) from the USA, which has prompted more turbulence on the markets by raising the spectre of an escalation on various fronts, creating even more uncertainty.

PRICES AND TRENDS OF CERTAIN FOOD RAW MATERIALS (MARCH 2019)				
National fine common wheat	Price (€/ton)	Monthly variation	Annual variation	Forecast
	191.83	2%	-6.3%	▲
Fine durum wheat from North Italy	Price (€/ton)	Monthly variation	Annual variation	Forecast
	224.83	0.9%	3.4%	▼
00 type common wheat flour	Price (€/ton)	Monthly variation	Annual variation	Forecast
	405	-1.2%	1.3%	▲
Semolina above min. leg. req.	Price (€/ton)	Monthly variation	Annual variation	Forecast
	447.5	2.3%	8.5%	▼
Eggs M	Price (€/100 pcs)	Monthly variation	Annual variation	Forecast
	9.65	4%	-4.5%	▲
Pork hams for Prosciutto 12 kg and over	Price (€/kg)	Monthly variation	Annual variation	Forecast
	3.49	13.7%	-8.9%	=
Beef – veal meat half-carcass, prime quality	Price (€/kg)	Monthly variation	Annual variation	Forecast
	4.95	0.4%	8.8%	=
Raw milk	Price (€/100 kg)	Monthly variation	Annual variation	Forecast
	44.83	-1.7%	11.4%	=
Churned butter	Price (€/kg)	Monthly variation	Annual variation	Forecast
	1.5	-10.2%	-55.9%	▲
Grana Padano aged for 9 months or more	Price (€/kg)	Monthly variation	Annual variation	Forecast
	8	0%	30.1%	=
Extra virgin olive oil	Price (€/kg)	Monthly variation	Annual variation	Forecast
	4.9	-10.9%	-1.6%	=

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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PRICE MONITORING				
FAO Food Price Index	Price (2002-2004=100)	Monthly variation	Annual variation	Forecast
	169.8	1.8%	1.2%	▲
Soft Red Winter FOB US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	203.96	-6.1%	-1.4%	▲
Mais, U.S. No. 2 Yellow FOB US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	189.42	11.7%	21.1%	=

IMF Food Price Index, Soft Red Winter, Mais: July 2019

In the States the deadlock in negotiations on corn and soya, weighed down by the absence of Chinese orders, have slowed down the demand of the other countries that traditionally purchase, in a market characterised by a “wait-and-see” attitude, in marked contrast with the dynamism that usually accompanies the start of the harvest period.

Europe has decided to proceed with prudence, not wishing to jeopardise its relations with the USA, already strained by the aid given by the EU to the aviation sector. The threat, announced by Washington, to impose tariffs on 11 billion dollars of European exports (various agrifood products have also been targeted), is motivating the caution exercised by Brussels in negotiating with the other side of the Atlantic, also given the risk of a recession in Germany, the effects of which would have serious repercussions on the rest of the Continent.

Looking at the figures, the third consecutive drop in the FAO Food Price Index, which experienced a further month-on-month decline of 1.1% in August, reflects the likelihood of a worsening in the global trade situation, which seems, for the time being, to have exonerated only the dairy and livestock sectors.

With regard to olive oil, in absence of objective elements, the current evaluations on the possible evolution of prices are based on forecasts pointing to a significant recovery in production both in Italy and in Greece, with a potentially bearish tendency, although this is likely to be counterbalanced by a reduction in the Spanish output after the record leap in last year’s production. Last year’s decidedly high stock levels will also be a decisive factor in affecting the market situation, with the European Commission estimating stock inventories of 732,000 tonnes, the highest in the last seven years.

4

Proceedings of the Pastaria Festival 2018. The complex relationship between packaging and sustainability

Fabio Licciardello
Italian Scientific Group of Food Packaging (GSICA)
Department of Life Sciences, University of Modena and Reggio Emilia

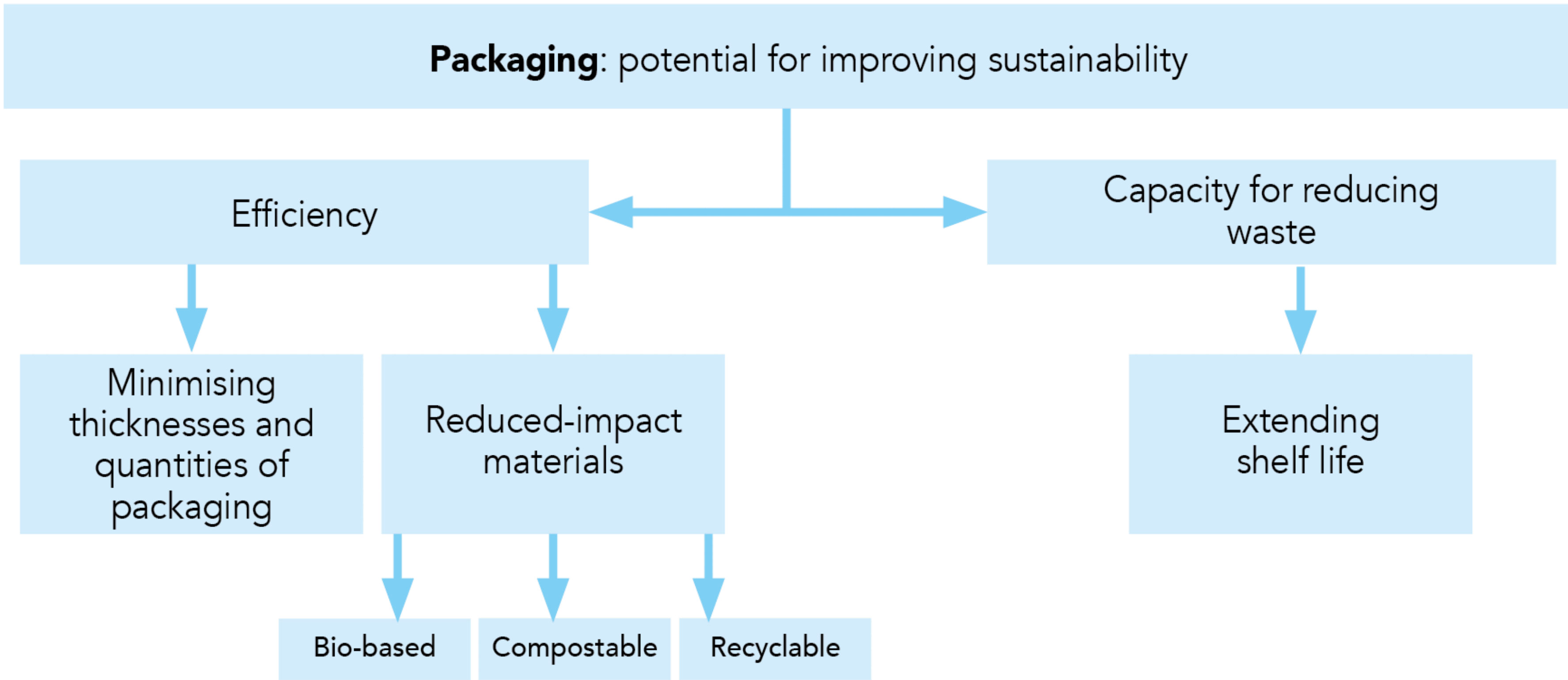
We publish a summary of Fabio Licciardello's contribution at the conference entitled *Pasta packaging: topicalities and prospects*, that was held as part of Pastaria Festival 2018.

Each food product should have a packaging system specifically designed for it, that takes into account its characteristics, any events that could lead to a loss of quality (gas exchange, light transmission, etc), and any specific distribution and marketing requirements. For example, for the characteristics of dried pasta (low humidity, simple composition, intrinsic stability) medium-barrier packaging with good mechanical resistance is sufficient, whereas for fresh pasta, highly perishable because often characterised by more complex formulations and high water activity levels, more sophisticated, high-performance packaging is required, with modified atmosphere and gas barrier materials. In addition to the indispensable function of protecting the characteristics of the food product itself, modern food packaging must also respond to environmental requirements: in fact, packaging contributes to the sustainability of a food product and should be designed with a holistic approach in order to optimise its overall environmental performance and reduce to a minimum the risk of deterioration, damage and product waste.

From the perspective of environmental sustainability, the reputation of food packaging is far from being squeaky clean, since the plastic materials used to wrap food products are deemed to be one of the main causes of environmental pollution. In reality, a more objective consideration of packaging is needed, – which counterbalances the unquestionable environmental disadvantages connected with its production and end-of-life and, especially, with its poor management – , in order to reap huge benefits in terms of food protection and the potential to reduce waste. Recent studies (Grunert et al., 2014) have shown that some sustainability factors related to packaging (for example, quantity of packaging materials used, waste of food and recyclability) already represent, for many consumers, elements of choice for specific categories of foods, indicating therefore, the need for food producers to consider packaging choices as strategic for the commercial success of their products.

If, on the one hand, it is clear that a food product cannot exist without its packaging, on the other hand it is also true that significant improvements are possible, and that the food industry should aim towards increasingly

Figure 1 PACKAGING: POTENTIAL FOR IMPROVING SUSTAINABILITY



more efficient and effective packaging systems. In other words, systems that are not only more sustainable but which produce better results.

According to Peelman et al. (2013), the sustainability of food packaging can be achieved on three levels: 1) at the level of raw materials; 2) at the production level, through more efficient energy processes; 3) at the level of waste management, considering re-use, recycling and biodegradation.

Packaging should be optimised using the minimum quantities of materials needed to fulfil its protective functions. Even if the weight of the packaging does not necessarily correspond to its effective "environmental weight", the adoption of thinner and/or lighter packaging materials reduces the use of resources and can, therefore, be considered a simple starting strategy towards waste prevention. Since a reduction in the quantities of packaging also implies lower costs for the manufacturer, this concept may appear obvious; however, in many cases significant reductions in thickness are possible, leading to considerable economic and environmental advantages (Licciardello, 2017). As per any other modification in the packaging system, any reduction in packaging implies the conducting of comparative shelf life tests, the aim of which is to demonstrate that the alternative system is able to guarantee acceptable levels of shelf life. Another goal pursued for the purpose of improving sustainability is the search for materials alternative to conventional fossil-based plastics. The use of conventional plastic poses a series of major ecological problems due to

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the fact that it is intrinsically non-degradable and its production requires recourse to fossil fuels. Bioplastics, including biodegradable materials, obtained from renewable sources or endowed with both characteristics, have been suggested as valid alternatives – for a limited range of applications – to conventional plastics since they offer environmental advantages in terms of protecting fossil resources and/or reduced impact at the disposal stage. The recyclability of plastic packaging depends partly on the efficiency of the collection and sorting systems. The ambitious objective of increasing the recyclability of plastic packaging, by improving the efficiency of the selection and recovery phases, implies re-designing the packaging from an end-of-life perspective. The adoption of high-performance composite materials (made with two or more different layers) over recent decades, has contributed to reducing the quantity of packaging but, conversely, it has worsened the end-of-life scenario, since the lamination of different materials makes it impossible, at the current state of technology, to recover the individual components. Thus, in the best-case scenario, such packaging has to be processed through the unsorted waste channel and used for generating energy (pyrolysis), (Ragaert, Delva & Van Geem, 2017).

Opinions on the perception of the role of packaging in the sustainability of food supply chains are at odds: scientific literature offers conflicting statements such as: “The contribution of packaging and its post-consumption phase to the environmental impact is low and represents between 1 and 10% of the total impact generated by the food supply chains” (Silvenius et al., 2014) but, on the other hand: “The end-of-life disposal of packaging remains a key environmental impact.” (Manfredi & Vignali, 2015). In actual fact, the contribution of packaging to sustainability cannot be generalised but should consider each specific “product system” on the basis of the environmental impact connected with the production both of the packaging and of the product itself.

The Packaging Relative Environmental Impact (PREI) (Licciardello, 2017) provides an objective way of measuring the impact of food packaging on the sustainability of a specific product. The PREI is the ratio between the environmental impact of the packaging, EI(pack), and the overall environmental impact of the packaged product, EI(food). These impacts can be conveniently expressed in terms of Global Warming Potential (GWP), which is the impact category most used and least affected by other factors.

$$PREI = EI_{(pack)} / EI_{(food)} \times 100$$

This index can be uses as a tool to support improvement strategies: in particular, high PREI values suggest that the actions designed to reduce the environmental impact of packaging materials can bring about an improvement in the sustainability of the system, whilelow PREI values suggest that food waste, for a specific product, has a significant impact on environmental performance and, therefore, investments designed to reduce food waste can be positive, even if they involve a certain increase in the impact of the packaging. Some of the cases, listed below, can be useful for understanding the potential of this indicator. On the basis of the data collected (Licciardello, 2017), beverages such as beer, wine and carbonated soft drinks are characterised by high PREI scores (of between 45 and 80%), testifying to the greater environmental impact generated by the production of their packaging – usually bottles made of glass or PET or aluminium cans – compared to the impact generated by the production process of the drinks themselves. For these products, the actions designed to reduce to a minimum the impact of the packaging, with particular regard to the reduction of the materials (lighter bottles and caps, new shapes), and to improve the recyclability of the materials are the correct strategies towards an improvement in the environmental performance of the product. A similar consideration applies to preserves in metal tins or glass jars, the impact of which is strongly influenced by the package. On the other hand, dairy products (milk, cheese, butter) and beef have low or very low PREI values, ranging between 1 and 15%, due to the high impact created by the production of the raw materials and their processing, in comparison to which the environmental impact of their packaging is, in some cases, negligible. For such products, environmental improvement strategies must be based on actions designed to extend the shelf life of the product and reduce losses, which, however generated, are an avoidable impact. The pasta sector is characterised by the fact that the two categories of product – dried and fresh pasta – have very different requirements. Some studies on the environmental impact of the dried pasta supply chain show that the packaging contributes to a limited degree (between 10 and 28%) (Bevilacqua et al., 2007; Dolci et al., 2016; Nette et al., 2016) to overall environmental performance, but no similar studies have been conducted on fresh pasta. It is clear that the heterogeneity of the various types of fresh pasta (with/without filling, type of filling and dough, production and packaging technology,


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etc.) make it difficult to treat the category in a generalised manner. However, even in absence of supporting scientific data, we can conjecture that not only does fresh pasta require more complex packaging, leading to relatively higher environmental impacts, but the production and processing of the raw materials themselves are more complex, thereby generating a higher impact. The strategies applied with the aim of improving environmental performance in a food product must, therefore, be based on scientific data that highlight the contribution of each element (food and packaging) to the overall impact. Even although some measures for improving packaging performance might slightly increase its environmental impact, these measures could also bring about undeniable advantages as regards the environmental performance of the system, thereby reducing the risk of food waste.

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5

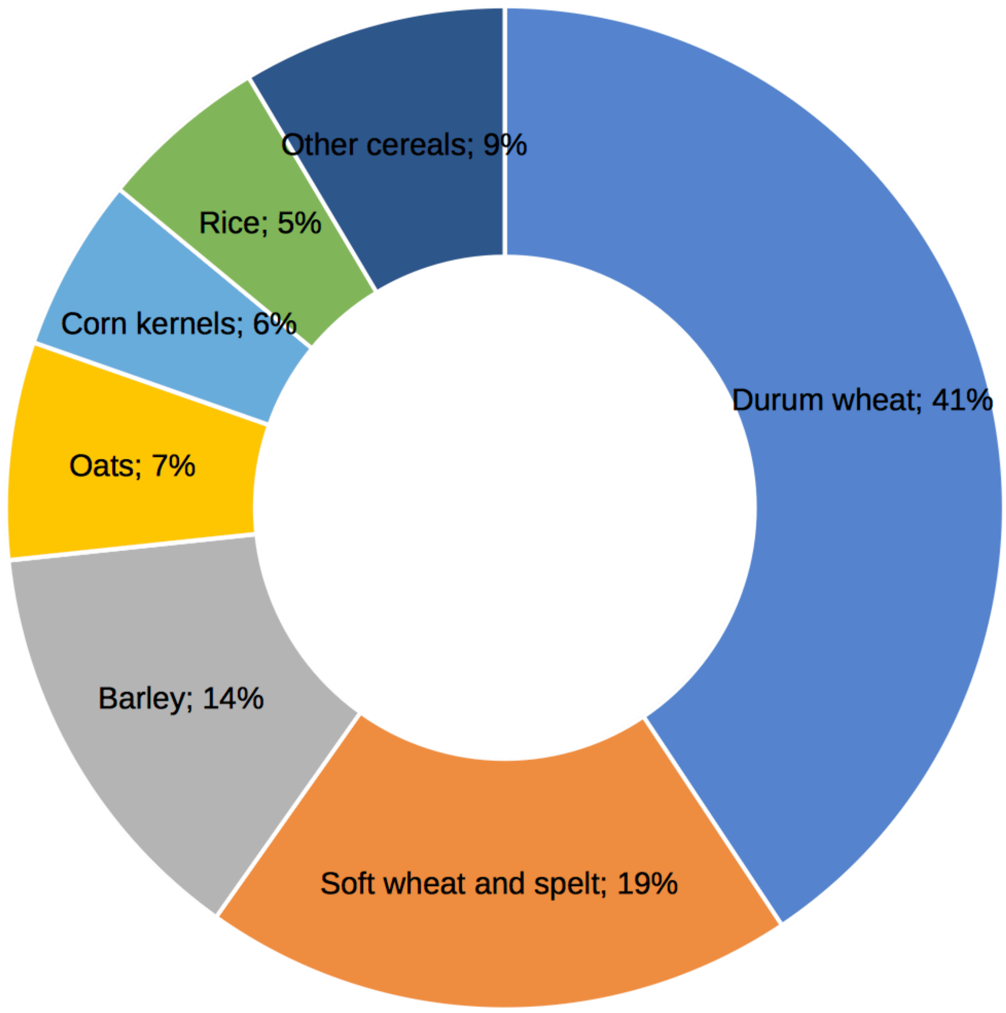
Organic farming, 2018 leaves its mark on consumption in Italy

Pastaria Centre for Economic Research

Pasta sales are also on the up, with a 2.1% rise in the first six months of 2019. For durum wheat organic land has extended to 132,500 hectares (+3.6% year-on-year).

Billings for organic foods and drinks in Italy have topped €4 billion. A market result that last year confirmed the positive trend which had been underway for around ten years, with a 5.3% rise on 2017 and a turnover that almost tripled in the course of a decade.
The data of the Sana Observatory, the international exhibition of organic and natural products, organised by the research company Nomisma, confirm the records attained in a sector that has now reached a degree of penetration in the Italian family market of over 85%, compared with 50% ten years ago.
In practical terms, over three families out of four purchased an organic product at least once last year. A segment, therefore, that is no longer considered a niche market, which in the phase prior to distribution, i.e. production, involves as many as 60,000 farm businesses and almost 20,000 industrial preparers.
The data produced by SINAB, the organic farming information system of the Italian Ministry of Agricultural, Food and Forestry Policies, presented at the 31st edition of Sana at BolognaFiere exhibition centre, certified at 31 December 2017, 2 million hectares of organically cultivated land, which accounts for over 15% of the national UAA (utilised agricultural area).
The sector's dynamism is further borne out by the export data, which forges ahead in double figures. Last year, according to Nomisma, the organic sector's billings abroad topped €2.2 billion, 10% more than 2017. But in the last ten years, its growth has been exponential, +600%, thanks to which the organic sector accounted, in economic terms, for more than 5% of the total value of Italy's agrifood exports.
Domestic sales, on the other hand, are growing first and foremost in large-scale distribution outlets, which handle 47% of the retail turnover. But an extra boost has also come, in recent years, from the extra-door channel, thanks above all to the contribution of bars, restaurants, public canteens and catering.
The organic product spending trend, considering the off-trade circuit alone (modern distribution, discount stores and traditional shops), has confirmed this year, for the first six months of 2019, a tendency towards growth, with a progression of 1.5%. With the exception of a few products, Ismea/Nielsen data reveal an increase in sales in all areas of the organic sector, with significant increases for meat, eggs, wine and sparkling wines. Cereal derivatives, a category that also includes pasta, closed the six-month period with a year-on-year growth of 2.3% (compared to the first six months of 2018). In the organic sector, it

Chart 1 CEREALS, DIVISION OF ORGANIC LAND AREAS PER PRODUCT (2018)



Source: Sinab/Mipaaf

accounts for over 17%, but in the conventional cereal and derivatives market, it accounts for little more than 14% of the market.

Over the last 5 years, according to Iri Infoscan Census, Italian spending on fast-moving consumer goods has been affected by a number of factors, but the main drivers behind their growth have been convenience, innovation and health consciousness. So in the light of these new tendencies, the drop, over the last few years, in sales of traditional semolina pasta, is comprehensible; it has been penalised for being less practical, at a time when the appeal of ready meals is growing thanks to the “ready to cook” options available on the market.

Riding the wave of health consciousness, organic pasta enjoyed a 2.1% increase in value in the first six months of 2019. But still in the same sector, positive performance was also observed for breakfast cereals (+6.7% on Jan-June 2018) and bread substitutes (+5.1%).

Evidence that speaks loud and clear on the state of health of the organic sector, say the analysts, and this also applies to organic pasta, the sales of which are ris-

ing, in contrast with the negative trend in the conventional pasta market.

Another aspect to be highlighted, in relation to the cereals market, is the record cultivation of durum wheat, the raw material for the production of pasta, which covered a land area of 132,500 hectares in the organic sector last year, a year-on-year growth rate of 3.6%. This expansion was more than twice that of the 62,000 hectares certified for soft wheat (spelt included) and even more in comparison to the 44,000 hectares for barley and the mere 23,000 hectares for oats.

The land area for organic durum wheat, which accounts for over 10% of the total areas allocated to this crop, is also larger than that of the pastures and grazing land and the entire expanse of organic vineyards, thanks particularly to the contribution of two southern regions: Apulia and Sicily.

More in general, an analysis of the regional distribution of organic land areas, in 2018, confirms the record attained by Sicily, followed by Apulia, Calabria and Emilia Romagna.

The order changes with regard to the number of operators, but the three regions topping the list are still the same. This time Calabria ranks first, followed by Sicily and Apulia.

Last but not least, it is important to point out that organic farm businesses account for 6.1% of the total, their average size being 28.2 hectares. This figure is almost three times higher than the national figure of 11 hectares, indicative of the fact that these production facilities are, on the whole, better structured and potentially more solid.

6

The 2019 durum wheat harvest in Italy sees a 2% drop

Pastaria Centre for Economic Research

Italmopa (Industrial Association of Italian Mills) estimates 4.2 million tonnes, with some problems in terms of quality. There remains the 35% shortfall, when it comes to Italy's industrial requirements, that is covered by imported wheat.

In the hypothesis put forward by Italmopa, the Industrial Association of Italian Mills, the forecast is for 4.2 million tonnes. This is the quantity of newly harvested durum wheat in Italy, which is down to the reduction of sown acres that came about as a result of the fall in international prices.
A production that is over a third below the industrial requirements of the semolina-pasta supply chain that, on an annual basis, shows a fall in the region of 2 percentage points.
As Italmopa has observed, things could have gone better in terms of quality in the areas of greatest production, and it has pointed out some critical issues – in newly harvested grains – that are attributable to meteorological phenomena and to farming practices that are not always suitable for maintaining production standards and guaranteeing the technical requirements called for by industrial users.
In particular, heavy rainfall in May caused problems in terms of quality, albeit patchily, in the area of Foggia, also known as Italy's granary because of the volumes that this Apulian province produces.
If, as many are anticipating, there will be a greater demand for foreign wheat, in particular Canadian, following the vertical collapse of imports from Ottawa experienced last year, it will be for two reasons: quality – which, as previously mentioned, does not always meet industrial needs, and the physiological national shortfall in grain – which Italmopa places at 35% for durum wheat and 60% for soft, with respect to the quantity-quality requirements of the milling industry.
As the association explains, imports therefore remain key as a complement, and not an alternative, to Italy's domestic production, given that the country is the world's leading pasta manufacturer, with 3.6 million tonnes a year, and the largest exporter, with almost 60% of production heading for foreign markets (2 million tonnes exported to no fewer than 190 countries).
In terms of imports, as was widely anticipated, there was an actual increase in the first four months of 2019 reported by the data processed by Anacer, the Italian Association of Cereals, that show that 676 thousand tonnes of durum wheat was purchased from abroad, a 45% rise compared to the same period last year. As analysts explain, this translates into a rise of 209 thousand tonnes, 78 thousand of which came from EU partners, mainly from Spain, and 130 thousand from third countries, principally Canada and the United States.
Confagricoltura (the Italian Confederation of Farmers) believes that Italy will need to produce more wheat in order to meet the demand for the raw materials required to

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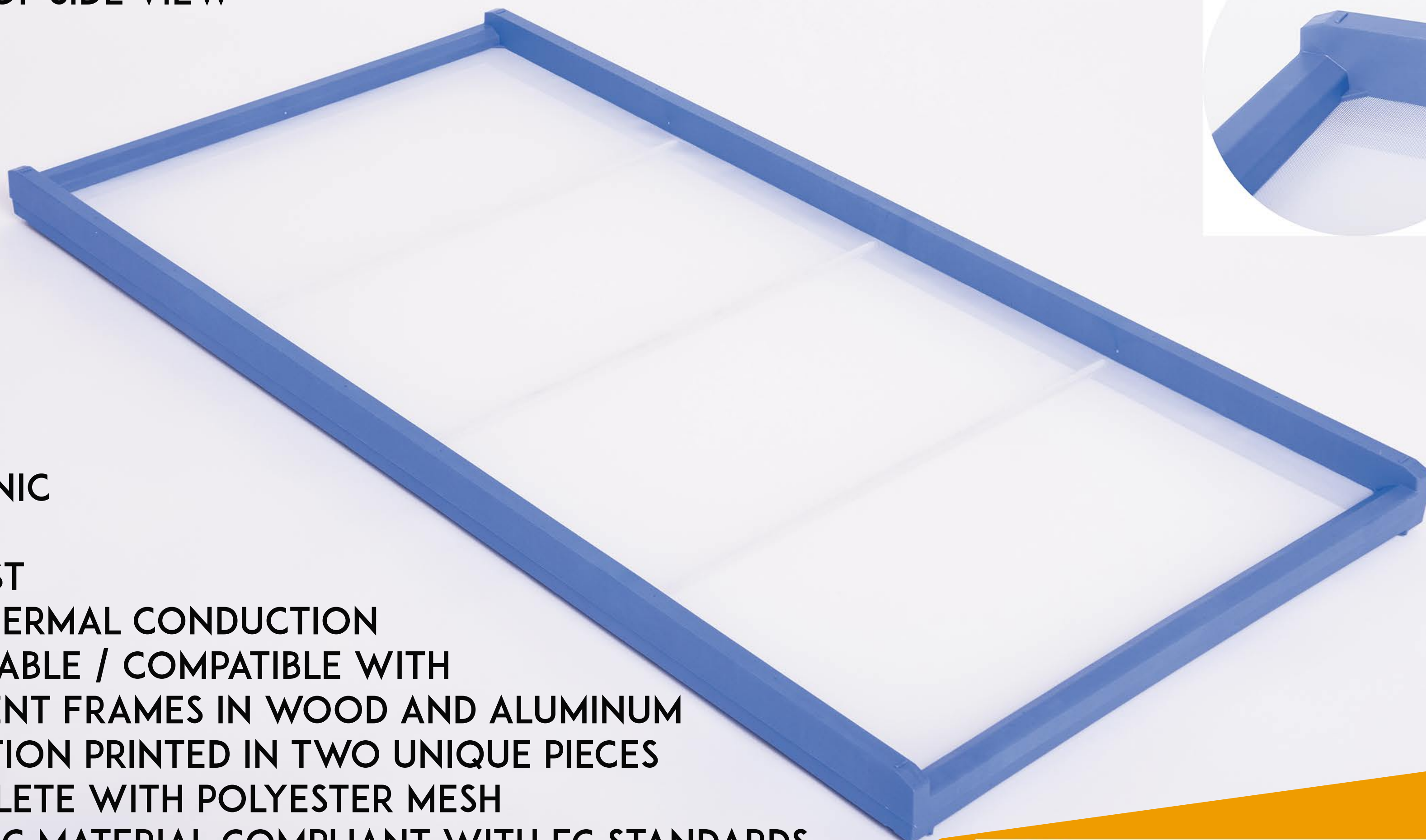

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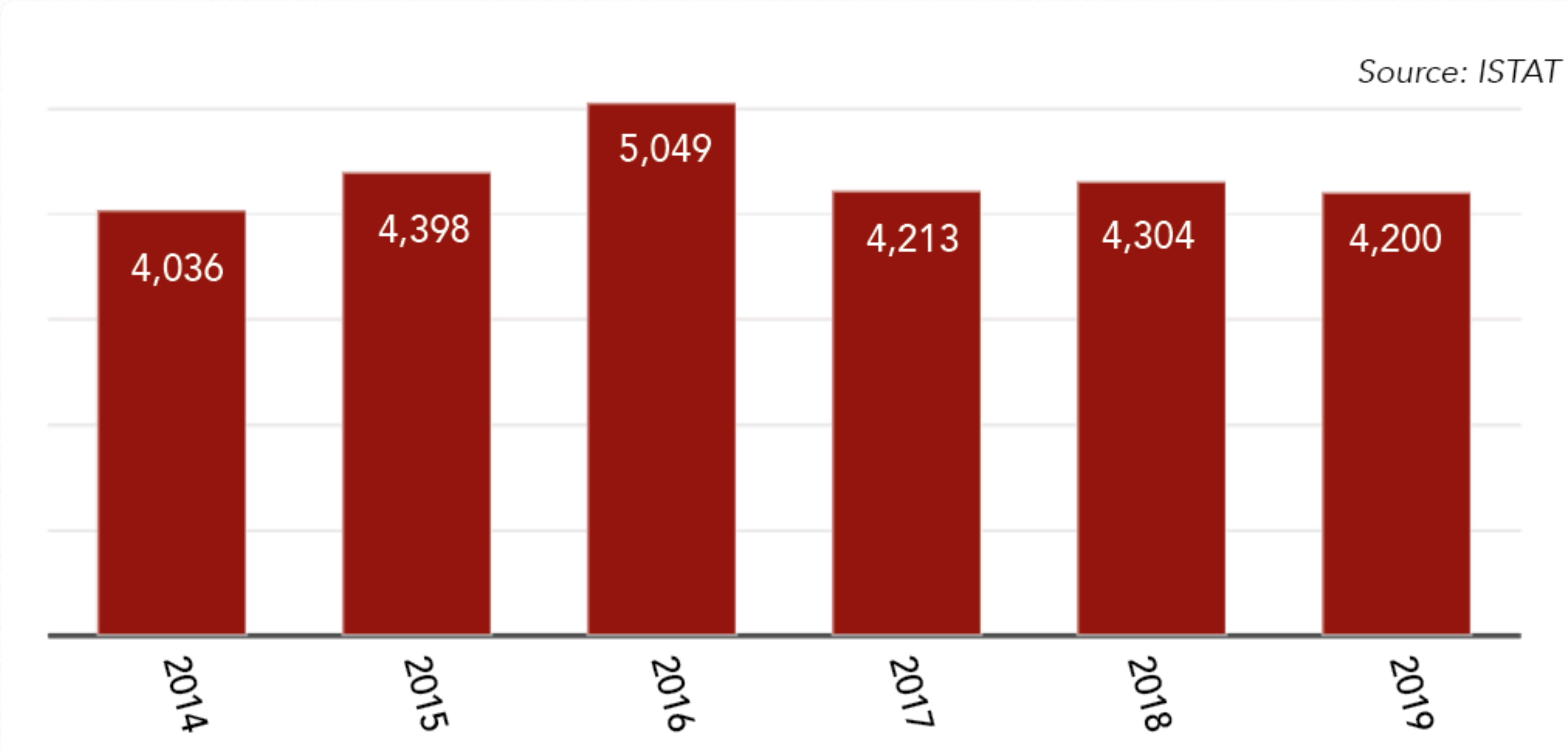
Chart 1 TRENDS IN DURUM WHEAT PRODUCTION IN ITALY (THOUSANDS OF TONNES)



Source: ISTAT

manufacture pasta. This operation, in turn, calls for a great deal of attention to be paid to the quality of the products and likewise to investments and support for the renewal of storage sites, many of which are obsolete, as well as to a strong promotion and communications campaign.

As the Confederation explains, imports of durum wheat into Italy currently remain at around 2 million tonnes a year, but what has changed is the geographical provenance.

The volumes that Italy once imported from Canada (the world's leading producer and exporter of durum wheat) have been replaced, in recent years, by wheat purchased primarily from France and Kazakhstan. And if a significant rise in imports from the north-American country has been noted in recent months, it is only because volumes had fallen to virtually zero in 2018.

Meanwhile, Canadian farmers too will this year produce a lower durum wheat harvest than the last one as a result of the drastic cut in investments (-21% on an annual basis) The most recent estimates from Statistics Canada have frozen the figure at 5 million tonnes, which corresponds to a 13% drop when compared to the harvest of 2018. The impact on effective availabilities was less significant (6.6 million tonnes, down 8% on last year) thanks to a stock of old production estimated to be in the re-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+39 052 450 61 21
+38 068 348 78
janna.imperija@mail.ru
p.janna@imperija.it
pasta.imperija.it

gion of 1.6 million tonnes. What also emerges from the Canadian figures is a 4% rise in exports in the 2019/2020 harvest, to 4.7 million tonnes, a forecast that incorporates greater international demand associated with a drop in global production.
In this regard, the International Grains Council's British analysts predict a 3.7% drop, in the face of a forecast global harvest of 36.7 million tonnes.
The USDA, United States Department of Agriculture, is thinking on the same lines, and is estimating a production of durum wheat in the USA of 1.58 million tonnes, against last year's 2.1 million (-25% approximately).
In this scenario, international prices may recover some of the ground lost in the last years, achieving an average increase of between 5 and 10%. A trend already seen in Italy, with the Foggia market opening the new harvesting season with values of around €230/tonne, a figure which, by the end of July, had risen to over €250.

7

I Cagliaritani Qui Sardegna

Editorial staff

Short supply chain, traditional shapes and more besides! A long-established Sardinian pasta factory wins over the international markets.

Durum wheat semolina, water, passion: these, and very little else, are the ingredients used by this long-established Sardinian pasta factory. Founded in 1963 as a small artisanal production facility run by the Sainas family, today it is a limited liability company that operates in a wide variety of markets, many of which are abroad.
The company has never abandoned its family approach, while maintaining a semi-industrial dimension and incorporating new shareholders and new expertise. In addition to Cristiano, son of the founder Francesco, the enterprise also belongs to another two shareholders: Massimo Conidi and Daniela Murgia, who have different competences and operate directly in the company. 2018 was an important year for I Cagliaritani. In fact, the company successfully purchased a business branch of the renowned enterprise Qui Sardegna, a brand of national and international fame. And this is how the current sales director, Nils Joswig - a German with extensive knowledge of extra-regional markets, resident on the Island for decades - joined the company.
This production facility, once famed for its traditional Sardinian pasta shapes such as fregula or malloreddus, now has 5 product lines which produce typical regional shapes, but also some from the other areas of Italy. The top of the range includes the Premium line and the national Made in

Italy line. The first line targets speciality stores and gourmet cuisine. It is packaged in a refined paper-laminated bag weighing 500 grams and is made exclusively with certified Sardinian semolina. The second has a totally transparent bag which displays the product, enclosed in lightweight carton decorated with the colours of the Italian flag, and also targets a very high market segment.
Other lines include Qui Sardegna and Is Casteddaius, which can be conveniently purchased from Modern Distribution outlets, and the Organic line, which is available in three different specialities.

There are countless shapes, including the fregola, both thick and fine, with saffron or cuttlefish ink. And that’s not all! There are maccarrones de su ferrittu, malloreddus, also flavoured with saffron – as dictated by the tradition of Southern Sardinia – mullet roe, “primavera”, i.e. tri colour, or with cuttlefish ink. There are, however, also other shapes typical of other regions which now play a leading role in the culinary heritage of the entire country, and which the company offers. Among these: trofie, torchietti, spaghetti, also with cuttlefish ink, linguine, mezze penne, fusilli and paccheri.
Each line offers 500 gram packs, but there are also larger shapes, for specific require-

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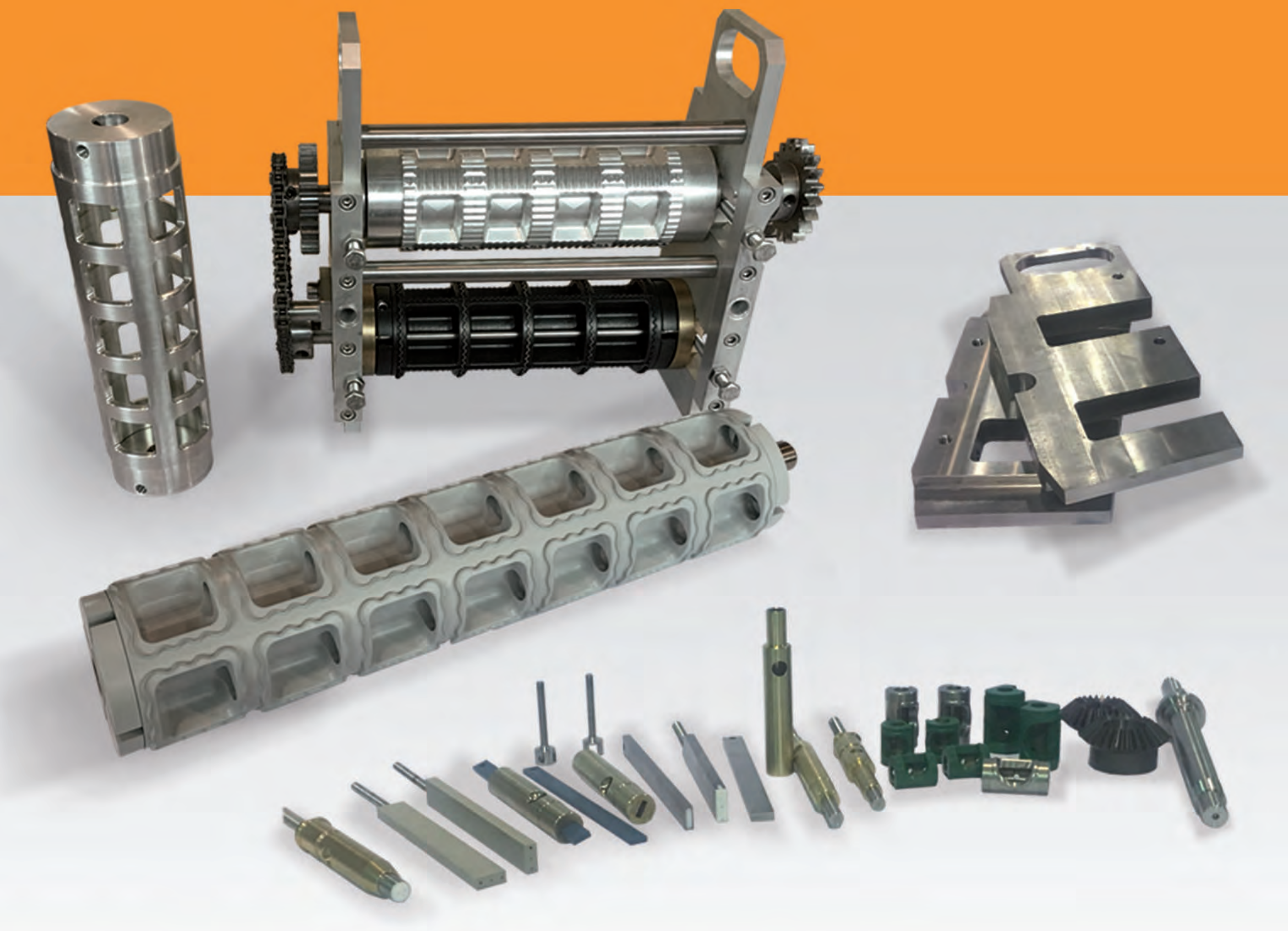

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ments, which are prepared in different packages, on request.

I Cagliaritani Qui Sardegna uses Sardinian semolina, but not exclusively, and not for all of the lines. This is, in any case, the path undertaken and the company is planning to stipulate supply chain agreements with Sardinian farmers in the near future. The company owners are so firmly convinced of the excellence of the short supply chain that they intend to use the wheat which they will grind in their own mill, located roughly a hundred kilometres from the processing plant. This is a structure that initially depended on the pasta-making plant which the company was obliged to construct elsewhere, due to lack of space. In this way I Cagliaritani can optimise the milling process to their requirements, so as to maintain the organoleptic properties of the final product intact.

That this short-supply-chain quality path appeals to the market is evident from the growth of the company over the last few years. Thanks also to IFS certification and the CCPB organic certification, the company has an output of over 6,500 kilograms per week and covers various markets. Approx. 30% of its output is allocated to Sardinia, while the remaining 70% is divided between the Mainland - particularly to LSD channels - and abroad, to countries like Germany, Great Britain, Canada, the United States, Spain, Japan, Switzerland, New Zealand and others, in smaller amounts.

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Canadian durum wheat, no glyphosate problem for EU imports

Editorial staff

90.9% of the wheat samples examined by the EU Customs do not contain detectable levels of glyphosate residue. And the remaining 9.1% contain residue well below permitted limits.

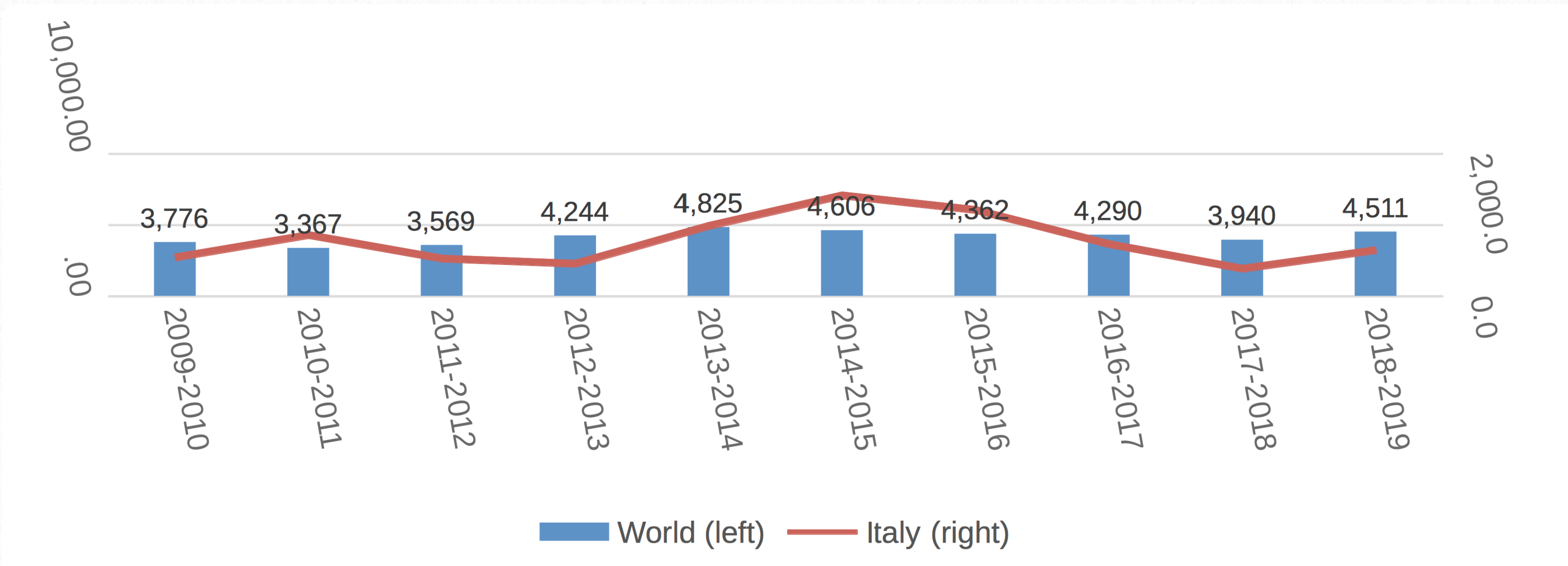
Glyphosate? Not a problem, at least not as regards residue on wheat imported into the European Union. The results of the objective controls reveal that 90.9% of the wheat samples examined at the Customs do not contain detectable levels of glyphosate residue. In a nutshell, wheat, even if originating from third party countries, and in particular Canada, the country targeted by some national farmers' associations, does not present any risks to safety, and any existing traces of glyphosate are within the limits set by EU legislation.

This reassurance to operators and consumers comes directly from the European Commission, in response to a question posed by an Italian Member of the European Parliament in Strasbourg. The data supplied by the EU Commission also show that any residue existing in the remaining 9.1% of the wheat examined by the Customs laboratories is well below admissible limits.

For ITALMOPA, the Association of Italian Millers, a member of Federalimentare-Confindustria, "the clarifications supplied by the European Commission leave no room for doubt or interpretations, and confirm what has already been said on several occasions by our association". "The data - continues the note - bring to light the irresponsible behaviour of certain local or national farmers' associations which, for trade union reasons, continue to foment unjustified and unjustifiable alarmism on imported grains. Alarmism that is widely reported by the mass media, fuelling confusion and fear among consumers of products obtained from the processing of wheat, such as bread and pasta."

On the other hand, the need to import wheat is nothing new, at least to sector operators, not only to make up for quantity deficits when the national harvest falls short of industrial requirements (Italy is the world's greatest producer and exporter of pasta), but also to compensate for gaps in the supply of high quality raw materials, given the fact that Italian wheat (depending on the year and on climatic conditions) does not always present the properties required to guarantee the production of flour and semolina in line with legislative regulations.

Chart 1 **10 YEARS OF EXPORTS OF CANADIAN DURUM WHEAT**



Source: Canadian Grain Commission

With regard to Canadian wheat, official statistics report a sharp increase in durum wheat imports from the North American country. This is a marked trend reversal compared to the extremely negative trend that lasted for three consecutive years.

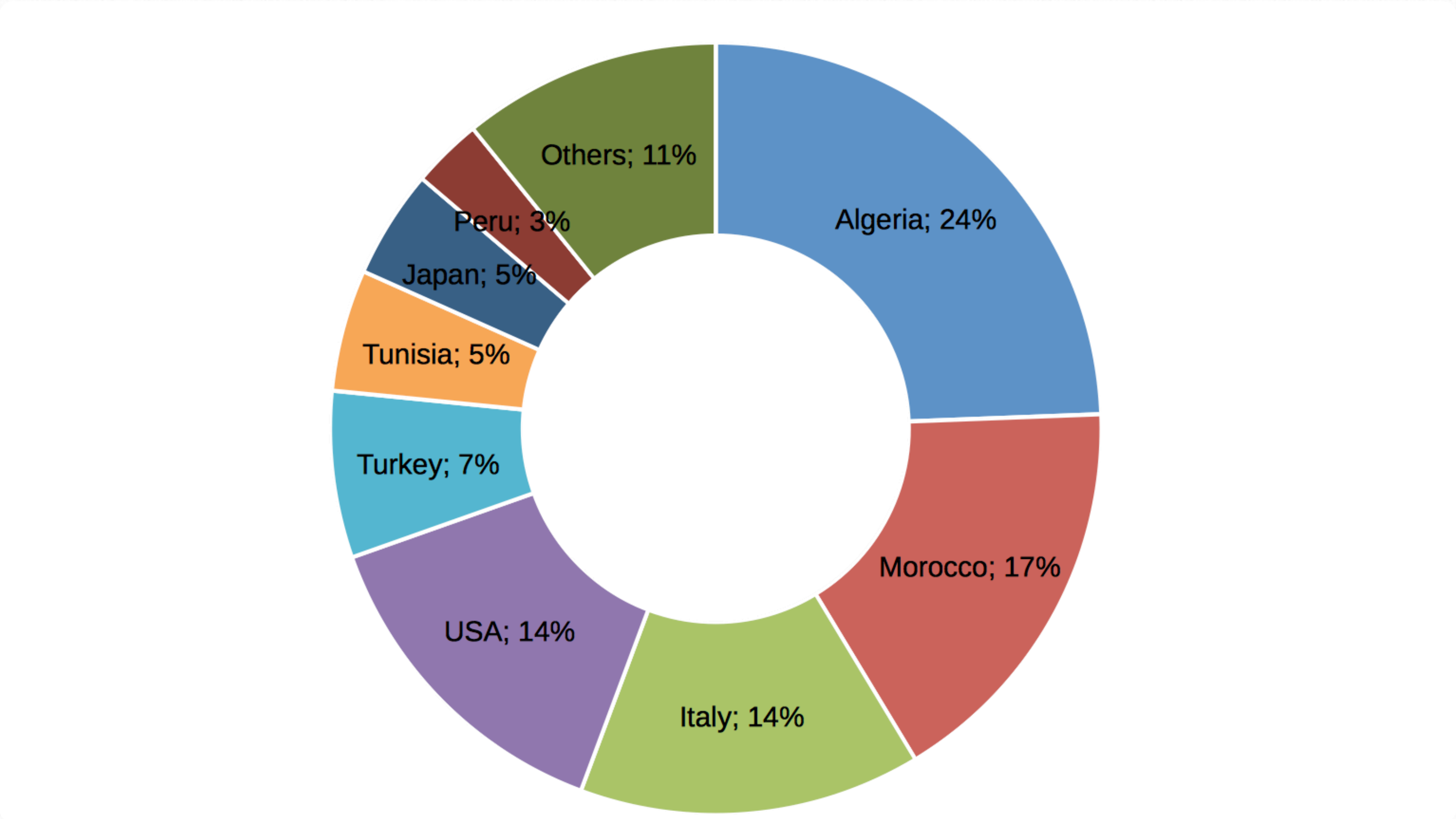
Let's take a look at the figures: according to the Canadian Grain Commission, exports to Italy from August 2018 to July 2019 (the entire trade year 2018/19) rose by 67.3%, to 674,100 tonnes.

The data, while showing clear signs of recovery compared to the ten-year minimum suffered in 2017/18 (less than 387,000 tonnes), is still below the historical average and light years away from the peak, five years ago, when Canadian durum wheat exports to Italy topped the threshold of 1.4 million tons.

Four years ago (in 2015/16) Italy was Ottawa's first destination market, accounting for almost one third of its exports. This quota dropped in 2017/18 to 10%, a far cry from Algeria's 26% Morocco's 21% and the USA's 19%. The two North African countries have maintained their advantage on Italy also in the present year 2018/19, but the Italian quota has risen, in the meantime, to 14% coming into line with that of the USA.

Seen from the Italian standpoint, ISTAT data processed by ANACER (Italian Association of Cereals) certify, in the first six months of 2019, an increase in the country's imports of durum wheat of 205,000 tonnes, i.e. 21% more compared to the same period of 2018. In the six months in question, Italy imported 387,000 tonnes

Chart 2 EXPORTS OF CANADIAN DURUM WHEAT BY DESTINATION (2018/2019)



Source: Canadian Grain Commission

from Canada, almost nine times more than the meagre 44,000 imported from Jan-June 2018.

It is also important to point out that a year ago less than 5% of the wheat imported in Italy was Canadian, while in the first six months of this year, the Canadian quota rose to 33.4%.

"It should be observed - says Cosimo De Sortis, President of ITALMOPA - that in the face of a 35% deficit for durum wheat and a 60% deficit for soft wheat, imports are indispensable, but as a complement, and not an alternative, to national production."

"The Italian milling industry - continues De Sortis - is a flagship of the Made in Italy food industry thanks to its unique ability to identify, select and process the best wheat, regardless of their origin. To think of solving the structural problems of Italian cereal growing by raising doubts about the healthiness of imported wheat – which has always been indispensable for both quantitative and qualitative reasons – is a reckless and deplorable attitude and, above all, it is detrimental to the consumers' right to be properly informed."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