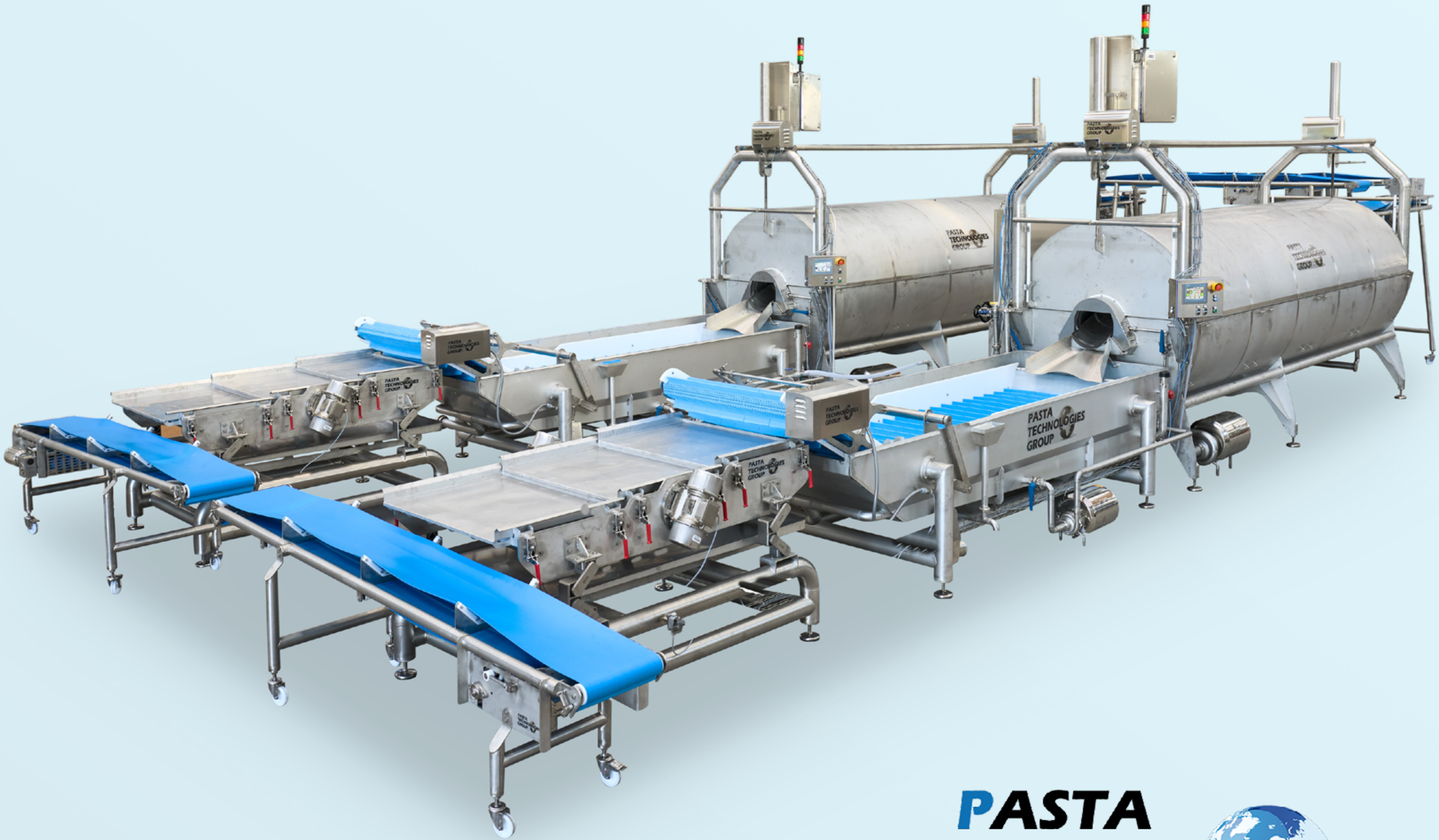
Pastaria International DE 5/2020 • September

Pastaria international



PASTA TECHNOLOGIES GROUP

MULTIPRODUCT AUTOMATIC COOKING LINES

The professional information network magazine for pasta manufacturers

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5
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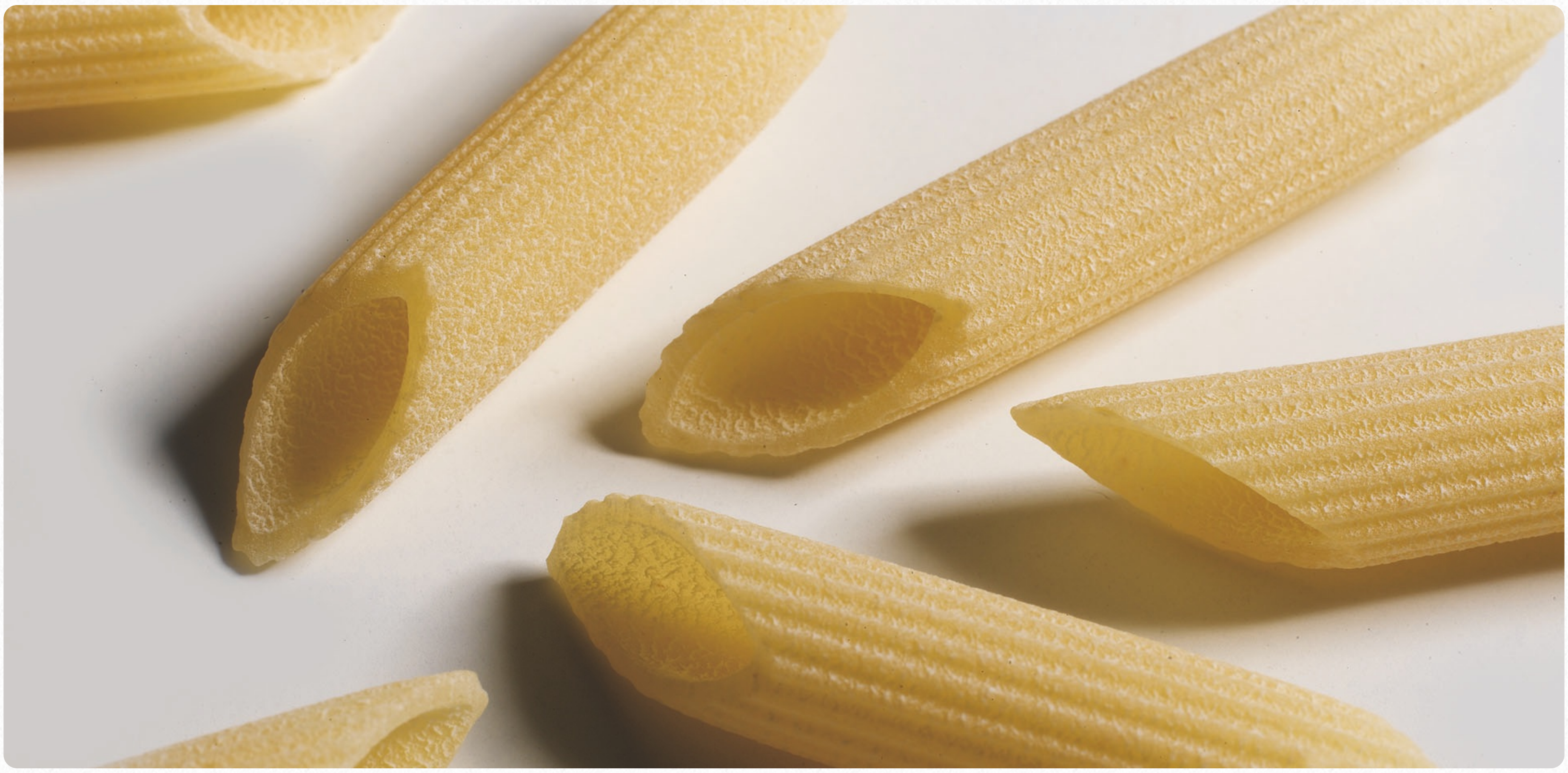
Colophon

Pastaria International DE
5/2020
September



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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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NPA 2020 Webinar Series

The National Pasta Association is pleased to announce the schedule for webinars that NPA is hosting in 2020 that were scheduled to take place at the 2020 Annual Meeting. These webinars will be free of charge for all NPA members and non-members that registered for the 2020 Annual Meeting. If you are not a member of NPA and you did not register for the 2020 Annual Meeting but you are still interested in attending some or all of the webinars, please email **info@ilovepasta.org** to receive complimentary registration. Click on the titles of the webinars to register now!

Webinar Schedule

June 24 - Recording Available Now!
State of the Industry Report & NPA Moving Forward
Carl Zuanelli, Nuovo Pasta Productions and NPA Board Chairman

July 16 - Recording Available Now!
U.S. Durum Outlook
Jim Peterson, North Dakota Wheat Commission

Tuesday, September 22, 2:00 – 3:00 pm ET
NPA Communications and Research Update
Alexandra Ozerkis and Kara Yacovone, NPA Communications

Thursday, October 22, 2:00 – 3:00 pm ET
NPA Technical Affairs Committee (TAC) Report
Alexis Freier-Johnson, 8th Avenue Food & Provisions
& NPA Technical Affairs Committee Chair

Thursday, November 12, 2:00 – 3:00 pm ET
Legislative & Regulatory Update
Gary Kushner, Hogan Lovells and NPA General Counsel

All webinars will be recorded and available on the **Members Only portion of ilovepasta.org** the day after they premiere. If you need assistance accessing the recordings, please email **NPA Staff.**

Sponsorship Opportunities

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1

All set for Pastaria Festival 2020, on-line for the first time

Editorial staff

Conferences, presentations, meetings, networking and exhibitors: for the very first time, Pastaria Festival's traditional packed programme of events will be presented in a digital format. The event is scheduled to take place on-line on 25 September 2020. The 2020 edition is also growing on an international level: many of the conferences will be translated simultaneously into English for the benefit of the numerous foreign operators who have signed up for the event.

We are fast approaching 25 September, the day on which the Pastaria Festival 2020 will take place. It is the fourth edition of the festival and the very first to be held in streaming.

Users who have registered (registration is free) will be able to use their computer, tablet or smartphone and an internet connection to access a packed programme of conferences, presentations and initiatives dedicated, as always, to professional information and updating on pasta production activities, aimed at operators working in the Italian and international pasta sector and in the supply chain.

"Pastaria Festival – Sharing know-how on pasta manufacturing" is an event organised by Pastaria in collaboration with the most prestigious pasta manufacturing associations, both Italian, such as 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 international, such as the IPO (International Pasta Organisation), ABIMAPI (Associação Brasileira das Indústrias de Biscoitos, Massas Alimentícias e Pães & Bolos Industrializados), UNAFPA (Union des Associations de Fabricants de Pâtes Alimentaires de l'UE), NPA (National Pasta Association) and UIFRA (Unión Industrial de Fideeros de la República Argentina).

The Pastaria Festival is also benefiting from collaboration with AISTEC (Italian Association for Cereal Science and Technology), GSICA (Italian Scientific Group of Food Packaging) and – for the first time – Semouliers, the association of European millers that will hold its own virtual general meeting as part of the event.

The complete programme

The programme of the day is detailed below.

Registering for the event will allow you to take part in all scheduled conferences, presentations and initiatives, with the exception of the general meetings of associations which are reserved for members only.

9:00-9:30 am

Opening of proceedings

Juan Manuel Airoldes (UIFRA), Paolo Barilla (IPO), Riccardo Felicetti (Unione Italiana Food), Fabio Fontaneto (APPAFRE), Lorenzo Pini (Pastaria), Claudio Zañao (ABIMAPI).

Virtual Conference Room: **Auditorium**

9:30-10:45 am

Pasta, ingredients, health and nutrition

- Margherita Dall'Asta (Catholic University of Sacred Heart, Piacenza), *Pasta con-*

sumption and the glycaemic response: the effect of production technology

- Giuseppe di Pede Giuseppe di Pede (University of Parma), *Pasta and the Glycaemic Index: overview*
- Barbara Simonato (University of Verona) and Gianluca Giuberti (Catholic University of Sacred Heart, Piacenza), *Moringa leaf flour to boost polyphenol intake and modulate the digestibility of starch in fresh pasta.*

Moderator: Margherita Dall'Asta (Catholic University of Sacred Heart, Piacenza).
Type: **International Conference**
Virtual Conference Room: **Auditorium**
Languages: **Italian, English**

10:30-11:00 am
Wellmune and GanedenBC30, supporting your immune system
Type: **Product Presentation**
Virtual Conference Room: **Companies & Innovation Space**
Language: **Italian**

11:00 am -12:45 pm
Opportunities and challenges for pasta packaging

- Luciano Piergiovanni (President of the Italian Scientific Group for Food Packaging – GSICA), *Prospects for pasta packaging materials*
- Fabio Licciardello (University of Modena and Reggio Emilia), *Considerations on the ecodesign of fresh pasta packaging*
- Elena Torrieri Federico II University of Naples), *Biodegradable packaging and new fresh pasta packaging technologies*
- Sara Limbo (University of Milan, PackLAB), *Fresh filled pasta: the role of packaging gases and light in extending shelf life*
- Valeria Frigerio (University of Milan), *LCA of the packaging-food system: a tool to support sustainable choices.*

Moderator: Luciano Piergiovanni (GSICA)
Conference organized in collaboration with the Italian Scientific Group of Food Packaging (GSICA)
Type: **International Conference**
Virtual Conference Room: **Auditorium**
Languages: **Italian, English**

11:00 am -12:00 pm
Semouliers Annual General Meeting
Participation reserved for members.
Type: **General Members Meeting**
Virtual Conference Room: **Associations Conference Hall**

11:00-11:15 am
Molini Pivetti –Soft wheat for fresh pasta and more
Type: **Product Presentation**

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Virtual Conference Room: **Companies & Innovation Space**
Language: **Italian**

11:15-11:45 am
Flavourland and the use of flavourings in fresh and filled pasta
Type: **Product Presentation**
Virtual Conference Room: **Companies & Innovation Space**
Language: **Italian**

11:45 am -12:45 pm
Sensory nuances in sauces
Type: **Product Presentation**
Virtual Conference Room: **Companies & Innovation Space**
Language: **Italian**

1:00-1:45 pm
Pasta: between science and fake news
Speakers: Daniela Martini (University of Parma) and Alice Rosi (University of Parma).
Moderator: Emanuele Marconi (AISTEC - Italian Association for Cereal Science and Technology).
Type: **International Conference**
Virtual Conference Room: **Auditorium**
Languages: **Italian, English**

2:00-3:45 pm
Fresh pasta and quality: from the dough to the label
- Marco Dalla Rosa (University of Bologna) and Stefano Zardetto (Voltan), *Multi-analytical approach for the evaluation of the chemical-physical aspects of fresh pasta*
- Andrea Pulvirenti (University of Modena and Reggio Emilia), *Formulation of fresh pasta fillings to increase microbiological stability*
- Emanuele Marconi ((University of Molise), *Fresh filled pasta process and product markers*
- Elena Santin (Rana), *Considerations on the new terminology of the nutritional label: nutri score, traffic light, battery*.

Moderator: Cristina Alamprese (University of Milan).
Type: **International Conference**
Virtual Conference Room: **Auditorium**
Languages: **Italian, English**

3:00-3:30 pm
Automatic lines for filled pasta and precooked gnocchi
Type: **Product Presentation**
Virtual Conference Room: **Companies & Innovation Space**
Language: **Italian**

3:30-4:30 pm

UNAFPA Annual General Meeting

Participation reserved for members.

Type: **General Members Meeting**

Virtual Conference Room: **Associations Conference Hall**

3:45-4:00 pm

Molini Pivetti – Soft wheat for fresh pasta and more

Type: **Product Presentation**

Virtual Conference Room: **Companies & Innovation Space**

Language: **English**

4:00-5:30 pm

Quality and process in dry pasta production: from the grain to the information on the label

- Alfio Spina (CREA-CI Acireale) e Giovanna Visioli (University of Parma), *Gluten proteins: molecular fingerprinting for the quality and traceability of Sicilian local durum wheat varieties*
- Alyssa Hidalgo Vidal (University of Milan) and Andrea Brandolini (CREA-ZA Lodi-Milano), *Nutritional and technological aspects of monococcum wheat pasta*
- Maria Ambrogina Pagani (University of Milan), *Rheological characterisation of ancient grains intended for pasta making*
- Emanuele Marconi (University of Molise), *Waren test: problems and strengths.*

Moderator: Gabriella Pasini (University of Padua).

Type: **International Conference**

Virtual Conference Room: **Auditorium**

Languages: **Italian, English**

4:00-4:30 pm

Flavourings and Clean(er) Label

Type: **Product Presentation**

Virtual Conference Room: **Companies & Innovation Space**

Language: **Italian**

4:30-5:30 pm

IPO Annual General Meeting

Participation reserved for members.

Type: **General Members Meeting**

Virtual Conference Room: **Associations Conference Hall**

5:30-5-45 pm

State of the USA Industry Report by NPA

Virtual Conference Room: **Associations Conference Hall**

Language: **English**

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5:45-7:00 pm

Pasta consumption and the pandemic: global scenarios and trends, from retail to food service

- Sara Beratta (Nielsen), *Passion for pasta... a return to the origins*
- Matteo Figura (NPD Europe), *Pasta consumption – eating out. From Covid to the new normality*
- Stefano Galli (Nielsen), *New horizons for the pasta market: an overview of opportunities in key countries*.

Conference prepared by the Pastaria Centre for Economic Research.

Type: **International Conference**

Virtual Conference Room: **Auditorium**

Languages: **Italian, English**

7:00 pm

Closure of proceedings

Networking and virtual stands

The Pastaria Festival will offer extraordinary opportunities for interaction and networking (including chats, video calls and virtual appointments) among those who participate, in various ways, in the event. Virtual stands and the on-line presence of personnel from the technical and sales departments of the exhibiting companies will give visitors a unique opportunity to ask for information on the latest innovations in the sector in terms of machinery, ingredients and services for the production of pasta.

The Steering Committee

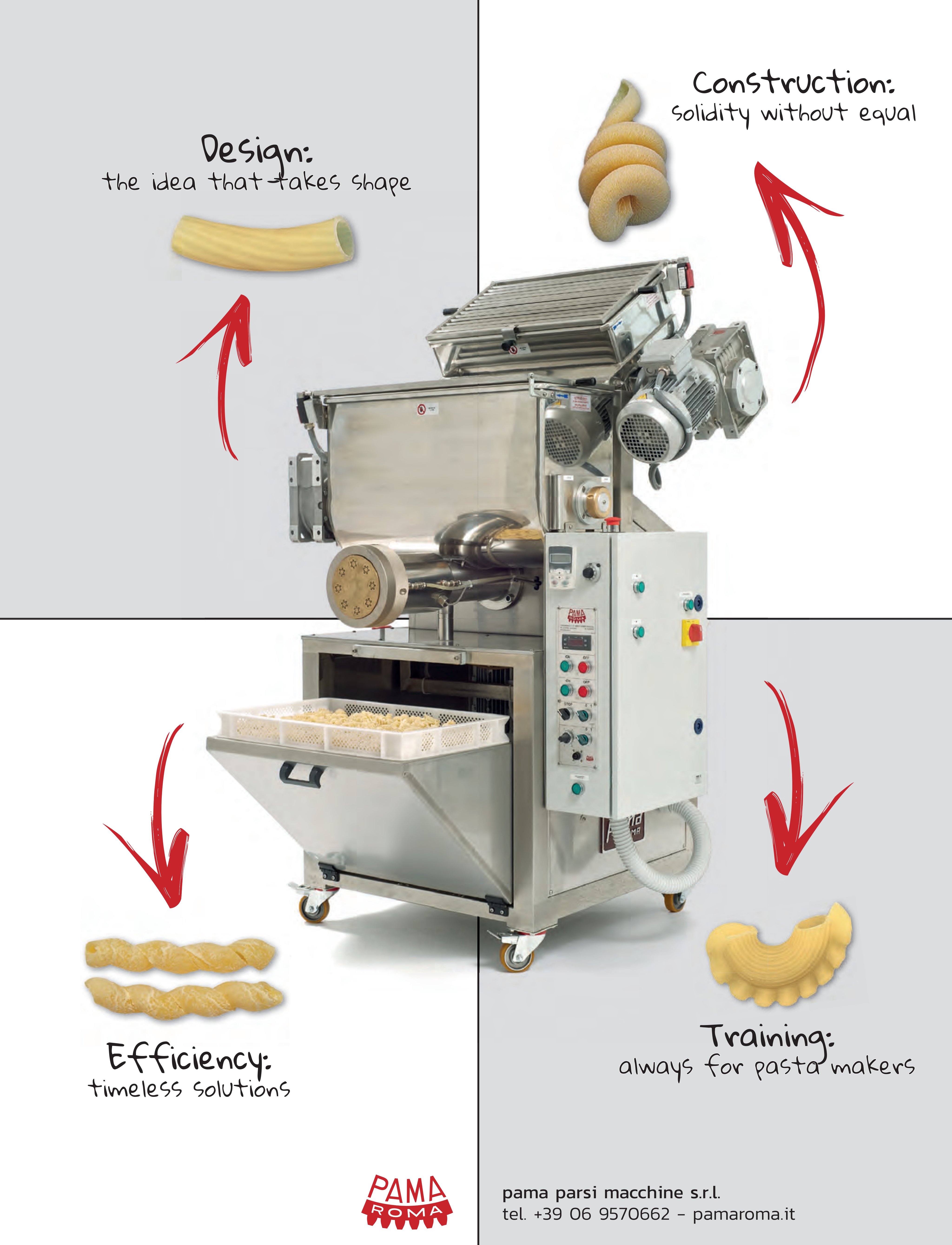
The Steering Committee of Pastaria Festival consists of a Scientific Committee composed of Cristina Alamprese (University of Milan), Marco Dalla Rosa, (University of Bologna), Daniele Del Rio (School for Advanced Studies on Food and Nutrition) Fabio Licciardello (University of Modena and Reggio Emilia), Gabriella Pasini (University of Padua), 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), Stefano Zardetto (Gruppo Voltan). The Steering Committee is coordinated by Lorenzo Pini, editor-in-chief of Pastaria.

The papers

The Pastaria Festival papers will be published in Pastaria over forthcoming issues of the magazine.

To take part

Participation is free, with compulsory registration, subject to availability. To register: https://pastariafestival2020.eventbrite.it.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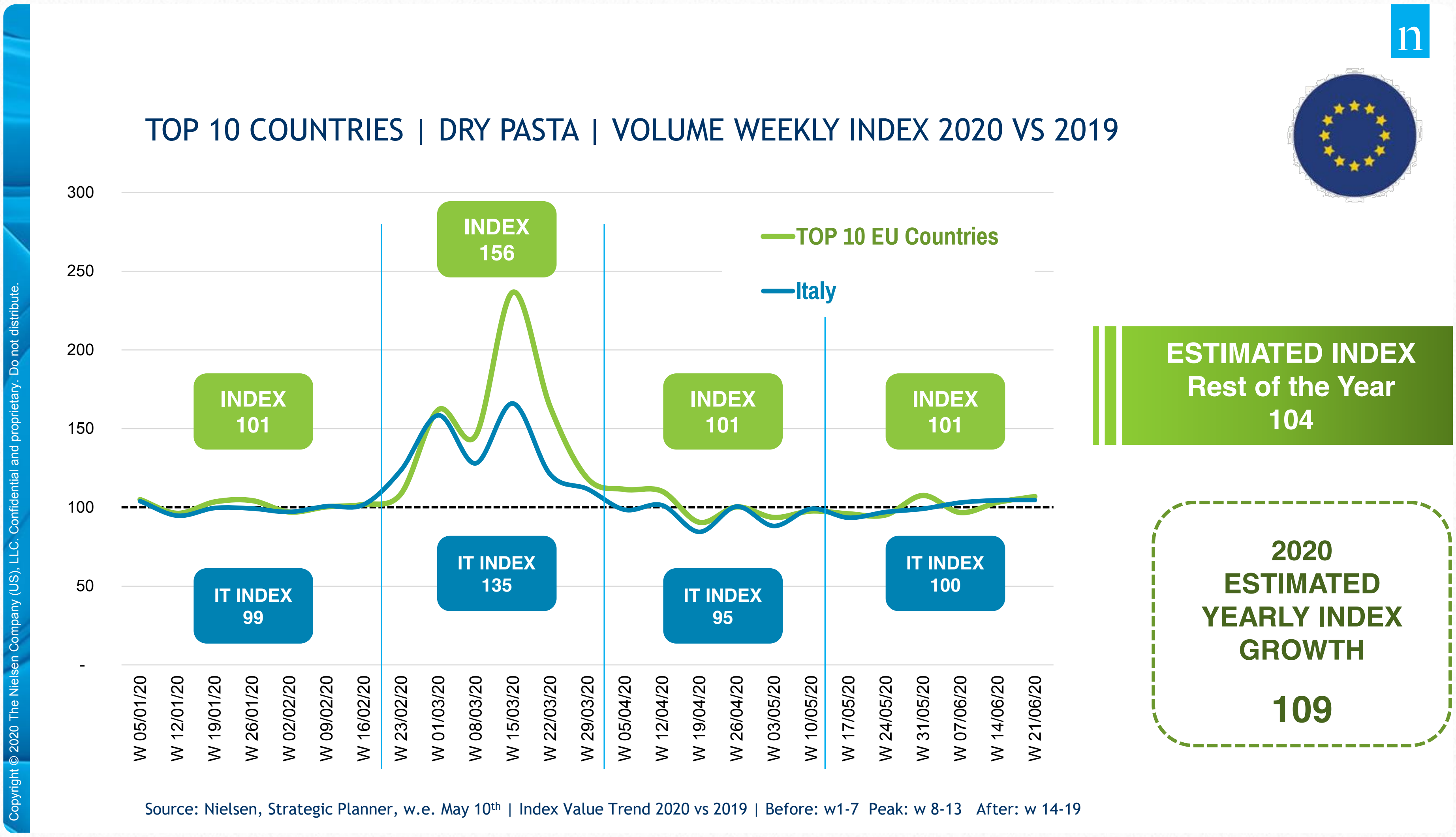
2

Post-Covid scenarios, pasta returns to normal without trauma after the boom

Pastaria Centre for Economic Research

This is what emerges from an interesting survey conducted recently by Nielsen, the main results of which are presented in this article.

An unprecedented change in purchasing behaviour and operating environments. Involving various sectors, from finance to logistics, from marketing to human resources.
Never before have we experienced – on a global scale to boot – an event of such proportions, devastating in its social, economic and behavioural repercussions.
The interference wrought by the Covid-19 emergency in private consumption alone has led to dramatic changes in the way people act, giving a new lease of life to corner shops, a sudden forceful boost to e-commerce and home delivery services, paralysing out-of-home consumption and inspiring self-care and DIY.
With the end of lockdown and the return to a new normal, much different from that existing prior to Covid, companies are shaking off their restrictions and preparing for cautious, gradual reconstruction.
This precautionary element seems to be the leitmotif of the general mood. A survey by the Nielsen research company, conducted on five European countries, photographing the situation in the week ending 17 May, reveals that the predominant feeling in 69% of the consumer sample in Spain, 55% in France and the UK, and 54% in Italy is that of concern. Only Germany exhibits less anxiety, with just a third of the consumer sample declaring that they feel apprehensive.
A prevailing opinion, expressed by all of the countries examined, also emerges from the survey, in relation to the time required to overcome the crisis, quantified by 69% of Germans and 58% of Italians in a period of over six months. Similar opinions were also expressed by 62% of the British, 66% of the Spanish and half of the French consumers interviewed. Attitudes were, however, very different with regard to the perceived response capacity of the respective countries: positive in Germany, France and Italy, negative in the United Kingdom, where the health emergency has created an overlap with the already existing uncertainties of Brexit, and in Spain, where a lack of confidence clearly prevails.
The impact of Covid-19 on family income and employment worries Italians and Spaniards to a greater extent, while Germans, whose country has a stronger economy and no serious financial difficulties, tend to be far more optimistic.
At a European level, expectations concerning economic developments, national health and occupational safety have dropped considerably.
In the general context of purchasing, for Fast-Moving Consumer Goods (FMCG), chiefly represented by foodstuffs, household and personal care products, an acceleration in the positive pre-Covid dynamics

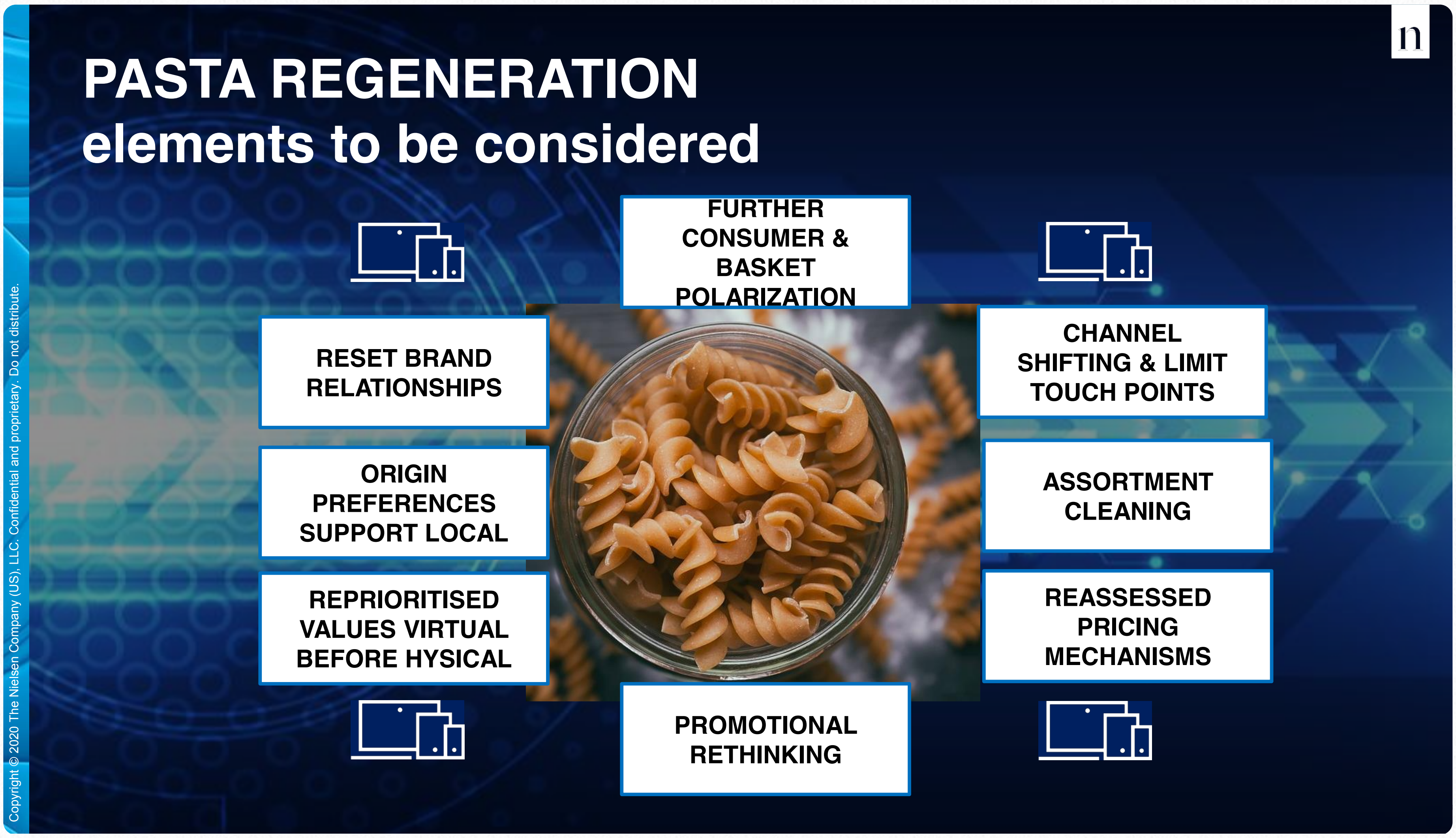


is forecast, with excellent prospects for e-commerce but a possible slowdown in "off line" sales through modern distribution channels.

After the peak of the lockdown phase, the Nielsen indicator elaborated in ten European countries, summarising FMCG purchasing trends, observed a retracing and subsequent revival which has raised the indicator with respect to the start of the year. The sub-index referring to dry pasta shows a much sharper rise during the phase of mandatory social distancing and an equally sudden return to normal with the progressive easing of the restrictive measures implemented to stem the spread of the virus. Indeed, consumers tended to stockpile pasta, together with other pantry products (rice, biscuits, preserves, etc.), during peaks in the emergency. This phenomenon also explains the boom in Italian pasta exports which, according to ISTAT's (Italian National Statistics Institute) provisional data, enjoyed a year-on-year increase of 26% in the first four months of 2020, in terms of both quantity and currency.

Returning to the Nielsen data, considering the outlook for the entire year, the specific dry pasta indicator is expected to close on a positive note, reflecting the favourable trend expected in all the main markets of the Old Continent.

All in all, a return to normal without trauma



from the consumption peaks recorded during the lockdown phase.
In general, health will affect the purchasing decisions of European consumers, and analysts are expecting an upturn in sales of vegetables, fruit and bakery products, and a downturn in other categories, from meat to sauces, and from beverages to snacks and alcoholic drinks.
From this perspective, pasta producers will have to consider certain elements, first and foremost the re-adjusted status of the various purchasing channels, which has rewarded discount stores, boosted by the economic crisis. Secondly, the importance of the origin of products which has benefited local produce and, last but not least, the role of brand and pricing policies.
In Italy, still based on Nielsen data, the most recent trends, updated to the last week of June, are giving negative results, due to a sort of “return-to-normal effect” after the lockdown peaks, in the pantry products sector and in the comfort food and health food markets. “Ready to eat” products, particularly in the vegetable sector, are also experiencing a downturn.
More in detail, data per single product show double-digit increases for coffee, olive oils, eggs, flour and other staples. Milk, hard cheeses, fresh pasta and apples are also experiencing a positive trend, while canned tuna, yoghurt and ice cream are at a standstill.

With regard to drinks, a comparison with last year, still in relation to the last week of June, attests to an upswing for wines and spirits, but a negative trend for retail sales of beers and mineral water.
FMCG macro-trends updated to the start of August 2020, still from Nielsen sources, confirm, networks being equal, an increase in discount store sales of 2.8% compared to the same week in 2019, against a drop of 2.2% in hypermarkets and 0.8% in supermarkets. Also worth noting is the fact that since the beginning of the year there has been a positive trend in turnover in all channels, with the exception of hypermarkets and cash & carry wholesalers. In the latter, the negative developments reflect dynamics existing prior to the Covid-19 emergency, associated with factors unrelated to pandemic conditions.

3

Commodity price observatory 3/2020

Pastaria Centre for Economic Research

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

There is so much we don't know in this time of general uncertainty fuelled by the worsening of the Coronavirus health emergency in Europe and the post-summer uptick of contagion. A number of factors could affect the commodity market, including the return of some political aspects that, at this stage, appear to grow in significance at the same rate as those of an economic and market character.
The decision to allow greater flexibility to the inflation targets of the U.S. Central Bank, the Federal Reserve, is already having an impact on the currency exchange rates, marked by a general weakening of the U.S. Dollar in relation to the other main currencies. Other political factors, in addition to monetary concerns, capable of affecting the prices of raw materials and the financial markets in general are the American elections, with their unpredictable results, and the fate of Brexit, with the "no deal" scenario that seems the most likely, but also the most feared outcome, due to all the unforeseeable consequences surrounding it. This is also a factor that, in the currency sector, has contributed to weakening the sterling, reverberating on exchange rates and on the inflationary expectations of the United Kingdom.
There are fundamental elements, also, that could weigh on oil prices, due to the supply surplus that has become structural, at this point, and could discourage ventures into the food commodity sector, particularly grains, which are experiencing decreased movement, mainly due to the revised estimates relative to the 2020/21 harvests.
The forecast profiles are not, however, risk-free. In the energy sector, the price dynamics (inclusive of coal and gas) has triggered estimates for 2020 (source: the World Bank) 40% lower on average than the level of 2019. The analysts expect a major recovery already in 2021, in a world returned to normal (though there is no certainty of this whatsoever) at least as regards public health. This in spite of the fact that, in the currently clearly recessive economic picture, the occupational impact of the crisis is unpredictable, as well as its inevitable effects on consumption, at a time of uncertainty about the evolution of the emergency and of the financial efforts necessary to combat it.
In the food sector, a powerful unknown is also the export market, given that the numbers seem to confirm the fear of a trend reversal, certified by a decrease of 3% in sales abroad in the second quarter of 2020 (the comparison is with the same period in the previous year and concerns the entire agri-food sector, including beverages), following the 10% growth reported in the first quarter, also on an annual basis.
On the other end, the dynamics of the international markets, as far as the prices of agricul-

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PRICES AND TRENDS OF CERTAIN FOOD RAW MATERIALS (AUGUST 2020)				
National fine common wheat	Price (€/ton)	Monthly variation	Annual variation	Forecast
	189.5	1.8%	-1.2%	=
Fine durum wheat from North Italy	Price (€/ton)	Monthly variation	Annual variation	Forecast
	285.5	-2.8%	27%	=
00 type common wheat flour	Price (€/ton)	Monthly variation	Annual variation	Forecast
	420	0%	3.7%	=
Semolina above min. leg. req.	Price (€/ton)	Monthly variation	Annual variation	Forecast
	493.5	-1.6%	10.3%	=
Eggs M	Price (€/100 pcs)	Monthly variation	Annual variation	Forecast
	13.5	0%	9.8%	▲
Pork hams for Prosciutto 12 kg and over	Price (€/kg)	Monthly variation	Annual variation	Forecast
	2.84	3.3%	-18.6%	▲
Beef – veal meat half-carcass, prime quality	Price (€/kg)	Monthly variation	Annual variation	Forecast
	5.2	0%	-4.8%	=
Raw milk	Price (€/kg)	Monthly variation	Annual variation	Forecast
	34.44	-2.1%	-23.2%	▼
Centrifuged butter	Price (€/kg)	Monthly variation	Annual variation	Forecast
	3.35	0.3%	-9.9%	▲
Grana Padano aged for 9 months or more	Price (€/kg)	Monthly variation	Annual variation	Forecast
	6.15	0%	-23.1%	=
Extra virgin olive oil	Price (€/kg)	Monthly variation	Annual variation	Forecast
	2.8	0%	-28.2%	▲

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
	96.1	1.9%	2.2%	▲
Soft Red Winter FOB US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	212.74	6.1%	4.3%	=
Mais, U.S. No. 2 Yellow FOB US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	152.55	3.1%	-19.5%	▼

IMF Food Price Index, Soft Red Winter, Mais: July 2020

tural and food commodities are concerned, indicate a gradual improvement, which would seem, however, to reflect what is essentially the devaluation of the U.S. Dollar, and some slight thrust beyond expectations observed this summer on the markets of sugar and vegetable oils.
Grains have benefited from the tiny increases on the forage circuit, with corn experiencing some recovery after the news of a worsening of the estimates on harvests across the Atlantic. The wheat market seems rather sustained in light of the latest statistical readings, after the disappointing outcome of production in Europe, especially France, where a significant drop in sales abroad is expected, generating a moderately upward price trend.
On the contrary, durum wheat, of which pasta factories are the main end users, is showing more unstable performance, initially higher at the beginning of the new season and decreasing at the height of the summer. As harvests proceed in North America, new balances are gradually taking shape which seem to orient the markets toward more linear performances.
As regards the other raw materials for the food industry, the markets remain primarily focused on certain fundamental imbalances from the supply side, associated with the crisis of the HORECA channel.
In the dairy sector, the rates of production in Oceania place something of a ceiling on prices, though partially offset by the expectation of a more moderate offering in Europe which, combined with higher internal demand, could send butter prices into an upward spiral.
On the meat market, the pressure of Chinese demand will continue to keep pork prices high, while no particular tension, at least in the short term, is predicted for beef and poultry.

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ITALIAN FOOD AND PACKAGING MACHINES SINCE 1955

65
ANNI DI DEDIZIONE, PROFESSIONALITÀ E INNOVAZIONE
1955 - 2020

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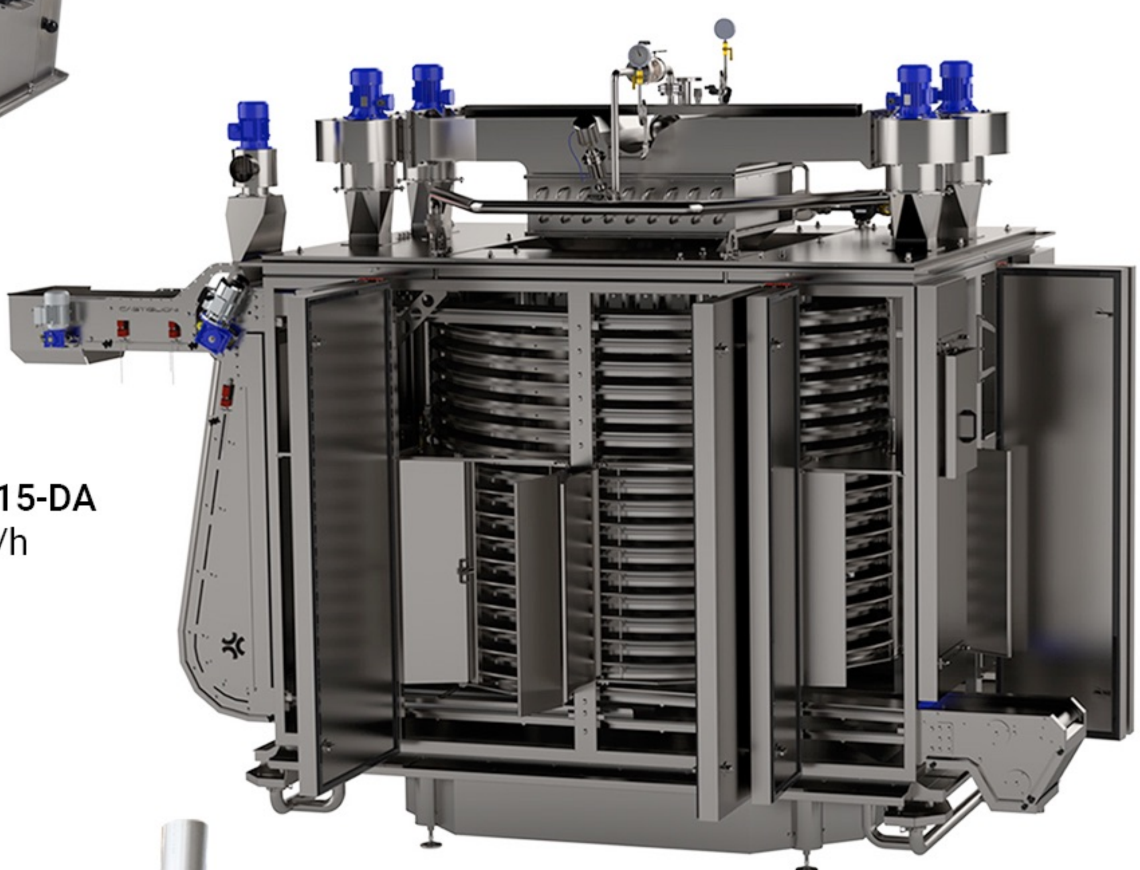

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Among vegetable oils, with the forecast of a season of scant production in Italy, some improvement is to be expected for extra virgin olive oils, after a season marked by greatly reduced prices. Confirming the expectations of an upward trend are also the indications on production developments in Spain, where the analysts tend to predict less growth than had been initially forecast, due to the drought, in a market that has also seen its stocks greatly reduced.
In general, there are worries everywhere about a declining demand of raw materials, also and above all in the sector of industrial non-food commodities, with the destinies of the markets closely tied to the social and economic effects of the pandemic.

4

The Consortium for the Protection of Culurgionis d'Ogliastra is founded

Editorial staff

After being awarded Protected Geographical Indication, Culurgionis d'Ogliastra now has a Protection Consortium, too, recently founded in Tortolì (Sardinia).

Italian pasta is beginning to elbow its way into the prestigious world of geographical indications and despite its late entry into the sector, it has already clocked up noteworthy numbers, compared to other famous national food specialities also as regards the export market.
Another piece of the complex jigsaw of protection and promotion was recently put into place in Tortolì, affectionately known as the land of longevity, where six local pasta factories have set up the Consortium for the Protection of Culurgionis d'Ogliastra PGI.
Almost four years have passed since Culurgionis d'Ogliastra were awarded the prestigious Protected Geographical Indication (PGI) trademark, which was also given, at the same time, to Pizzoccheri della Valtellina, adding to the list of previous awards to pasta: Maccheroncini di Campofilone PGI, Cappellacci di Zucca PGI and Pasta di Gragnano PGI.
A new phase in the protection, promotion and optimisation of the well-known local speciality is now in the offing. Six companies, which had already completed the procedure for the awarding of Protected Geographical Indication, are now making efforts, not only to stop the name from being abused or usurped, but also to ensure that this excellent product becomes an economic driver and tourist attraction for the whole of Sardinia, despite the production area being limited to the former province of Ogliastra and some areas in the South of Sardinia. There are a few municipalities that have jealously preserved the recipe, albeit with some differences, from area to area, giving the product an even more artisanal slant.
They are made with economical raw materials such as potatoes, but also with others that strongly characterise them, including cheeses, some of which are produced exclusively in Ogliastra. To this local oil and flavourings are added, with mint in pride of place. The Culurgionis are cooked, as tradition dictates, in boiling water, in just 3 minutes, an advantage that responds in full to the needs of modern life, in which time is a precious commodity. They can be served with a light tomato sauce, but are also excellent just with oil and pecorino cheese, or with butter and sage. Or – in keeping with the Sardinian origin – with a grating of mullet roe. And as per other types of pasta, whose uses are now widespread in every course,

from appetizer to dessert, Culurgionis can even be tastily barbecued or – even better – fried, thereby becoming an excellent accompaniment for an aperitif.
What makes them unmistakeable and particularly prized is their “wheat ear” closure, which is strictly handmade. In the past, knowing how to "embroider” Culurgionis decreed whether or not a woman was ready for wedlock. This was an art taught by mothers to daughters from a very early age. Even nowadays, when technology has made it possible to automate every step of the processing, this final touch is still strictly carried out by hand. Notwithstanding innumerable attempts, no machine so far has succeeded in replacing this fascinating dexterity of the hands that is becoming more and more a feature of experiential tourism, cooking classes and much more besides.
Ogliastra is an exceedingly beautiful part of the country, as generous as it is isolated, so much so that it is considered an island within an island, reason for which its most characteristic food product, the Culurgionis, only reached fame about ten years ago. "Obtaining the PGI has given this speciality great popularity and spread it much further than we could have possibly imag-

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Vito Arra, Chairman of the Consortium for the Protection of Culurgionis d'Ogliastra

ined. In many respects this has taken us by surprise, but not always pleasantly," says Vito Arra, the largest producer and newly-elected Chairman of the Consortium, who adds: "If on the one hand this fact is positive because it helps promote

the product, on the other we are witnessing all kinds of abuse on a daily basis. The Culurgionis name is used improperly to indicate products that may be similar but not always of the same high quality standard; sometimes with a different kind of sheet pasta or filling, in some cases even coloured, but almost always manufactured outside the area designated by the geographical specification. There is no food festival or event in Sardinia in which Culurgionis d'Ogliastra does not feature in the image campaign, even for events in which our product is neither featured nor pertinent. The name is repeatedly being usurped in a way that protects neither the manufacturing companies that adhere to the control system, nor the consumers, who are often misled and end up mistaking – and hence purchasing – one thing for another. The need for measures that protect both is increasingly pressing and this will be, among other things, the job of the newly-founded consortium". A consortium with one unanimous voice: the constitution of the new protection body is just the starting line, not the finish. The aim is to significantly increase the membership and the quantities produced, and to be as inclusive as possible, not only with regard to fellow-producers and packaging companies, but also with regard to the primary sector, with which supply chain agreements must be stipulated. The Culurgionis can and must become a driver for the development not only of Ogliastra, – an area with record levels of depopulation and youth unemployment – but of the whole of Sardinia. The producers aim to increase the workforce, particularly with reference to women. Once more pasta – this time filled pasta – will be the key that opens the doors to the markets.

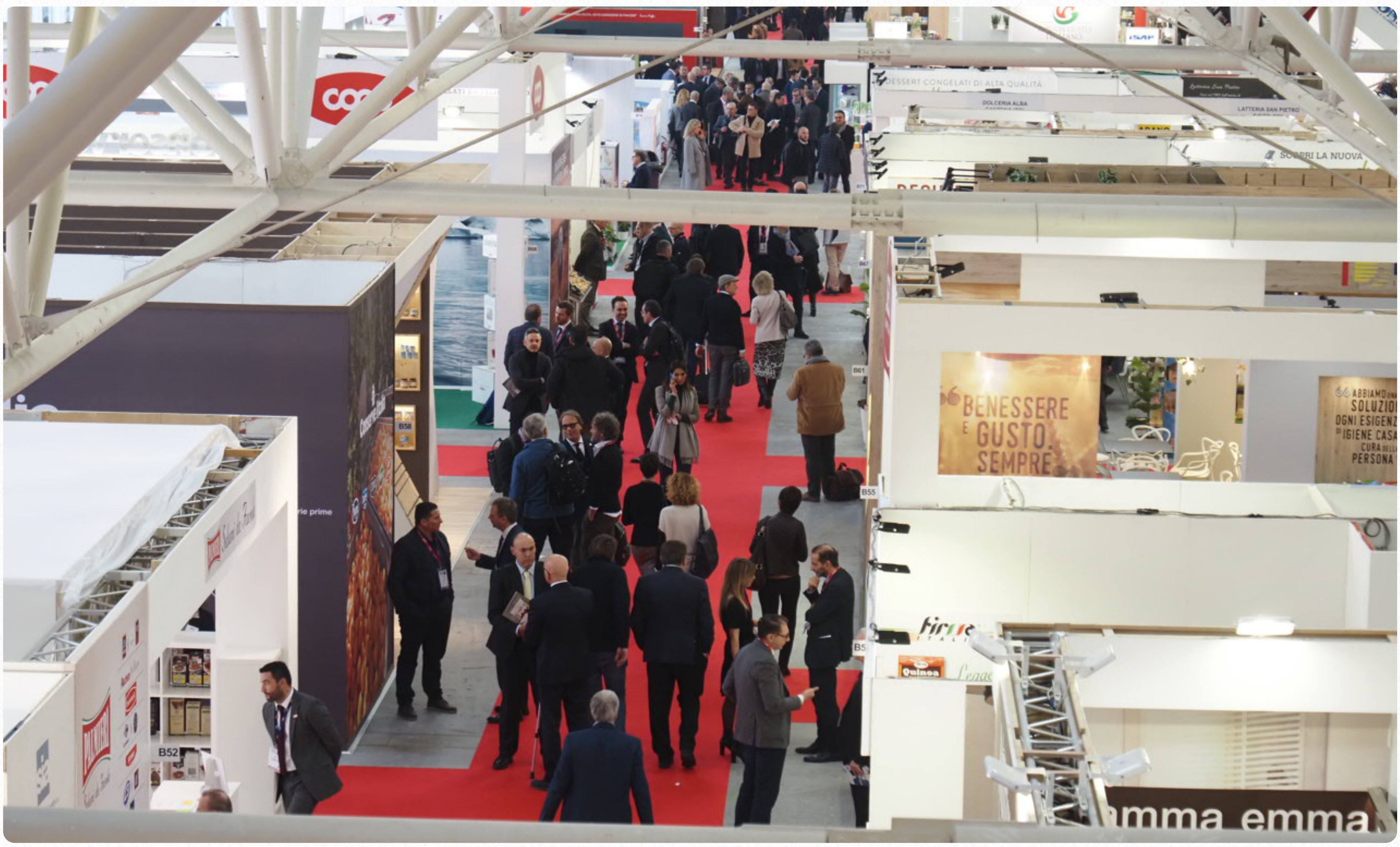
The members of the Protection Consortium are:

- Laboratorio di Pasta fresca di Richard Marci di Cardedu;
- Cospat soc.coop. di Ilbono;
- Italagourmet S.r.l.s. di Tertenia;
- Ditta Pastificio Sapori di Sardegna di Tiziana Loi di Loceri;
- Muceli&Lotto S.n.c. di Jerzu;
- I Sapori d'Ogliastra di Vito Arra di Lanusei.

5

Free-from and rich-in products: the new trends at MarcabyBolognaFiere in the Free From Hub

Press release



Free From Hub, the new project created thanks to the know-how and experience of BolognaFiere and Bos, will be making an appearance at the 17th edition of MarcabyBolognaFiere, which is set to take place on 13 and 14 January 2021.

MarcabyBolognaFiere, the international event for Private Label products, has always kept a close eye on the evolution of market trends in order to intercept the latest tendencies and emerging markets in order to represent them at the event.
For this reason, the Free From Hub, the new project created thanks to the know-how and experience of BolognaFiere and Bos, will also be making an appearance at the 17th edition of MarcabyBolognaFiere, which is set to take place on 13 and 14 January 2021.
The Free From Hub, with its innovative format, was presented at MarcabyBolognaFiere 2020. The initiative is structured into a series of appointments dedicated to the business of free-from products and will be incorporated into some of BolognaFiere's leading international fair platforms, including MarcabyBolognaFiere, Sana and Cosmofarma.
Within the context of the next edition of MarcabyBolognaFiere, the Free From Hub is intended to represent every facet of the Italian and international free-from market and to do so it has commissioned a series of studies to monitor the sector.
The market analysis has revealed that an emerging trend is linked to the theme of healthy food in its broadest possible sense: healthy food that is considered good for the body both due to the beneficial properties that have been added, in the case of rich-in foods, or ingredients that have been deliberately removed in the case of free- from products. Confirming this trend is the data from the 2019 Coop Report that underlines that "products in the health and wellbeing compartment have experienced growth of 2.9%".
The attention being paid to what we serve on our plates – or place in our shopping baskets – has become even more pronounced during the Covid-19 lockdown, demonstrating that consumers are becoming increasingly interested in healthy food. A healthy diet, in fact, is perceived as the first "medicine" not only in the case of food intolerances, where the first and often only cure is through dietary changes, but also to prevent illness and maintain one's body in good health and working order.
This interest gives a further boost to the functional or "rich-in" products, organic and free-from foods that represent the macro-categories of trends worth monitoring. We can see in greater detail the products that have performed the best in the Grocery Retail sector thanks to the Osservatorio Immagino that each year analyses the selection of products present in the shopping trolleys of Italian consumers.
Among the free-from products, those that stand out in particular are those that are gluten-free and lactose- free, which ap-

pear to have performed the best. According to the latest edition of the Osservatorio Immagino, “in 2019 Italians spent 3.6 billion euros in supermarkets on gluten-free and lactose-free products, confirming the trend observed in 2018”. This growth is highlighted also in the packaging and communications choices made by companies, “12.8% of packaged mass consumption products present on supermarket shelves include on their labels the claim “gluten-free” or “lactose-free”.

Among free-from products, an emerging trend concerns sugar-free products that contain lower quantities of sugar or no added sugar.

Driving the growth of these products are motivations relating to health as well as the sugar tax, the introduction of which has been postponed until 2021.

The World Health Organisation, in fact, has recommended a reduction in our daily intake of sugar following the results of scientific studies that demonstrate a correlation between excessive sugar consumption and the rise of diabetes, increases in body weight, obesity, high blood pressure and high cholesterol.

The Osservatorio Immagino has found, moreover, an increase in popularity of products in which sugars have been reduced or eliminated. “The products that contain the label ‘low sugar’ have reached a level of 3.1% of total sales and 2.8% of product range, in one year, while sales have increased by 7%. Products labelled “no added sugar” represent 1.4% of total sales and 1.6% of product range.”

The need to reduce sugar intake, highlighted by consumers, has also been taken on board by companies, which have chosen to extend their ranges of sugar-free or reduced sugar products. Proof of this can be seen in the growth of numerous categories of mass consumption products that use this claim on the labels of products including fruit-based drinks, snacks, milk, milk substitutes and cereal.

Many companies, moreover, are focusing on maximising the direct use of ingredients with a low glycaemic index (GI), a trend that ties in with the evidence that foods with a low GI have notable effects on cardiovascular risk, reducing postprandial hyperinsulinemia and encouraging the increase of so-called good cholesterol (HDL). It has also been noted that the ingestion of foodstuffs with a low GI prior to competitions, has a positive effect on the performance of sportspeople.

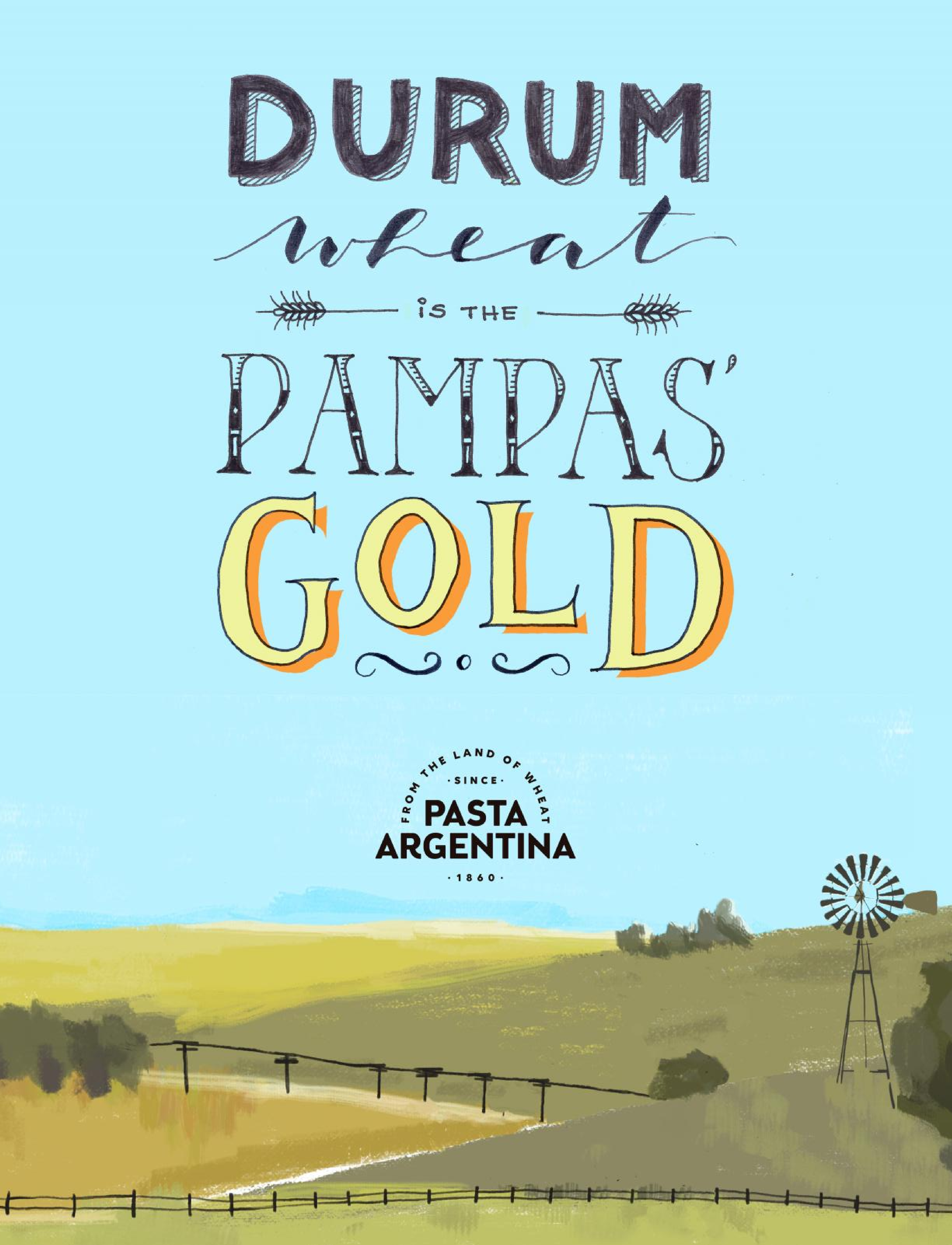
Another emerging trend concerns the functional or rich-in products, those that are rich in characteristics that are beneficial for the human body. According to the Osservatorio Immagino, “the business volume for these products has exceeded 2.5 billion

euros, reaching almost 10% of the share of the total foodstuffs surveyed and makes up 9.3% of packaged food product ranges”.

The food ingredients perceived as beneficial and preferred by the market are: almonds (in first place since last year), oats, ginger, turmeric, sesame, blueberry, coconut, pumpkin seeds, chia seeds, flax seeds, barley, kamut, quinoa and wheat germ. New entries include coconut water and matcha tea.

Following the trends of the market MarcabyBolognaFiere, flanked and assisted by the Free From Hub, will shine a spotlight on the year’s hottest issues, such as sugar free products, with bespoke content and representatives from some of the market’s key companies and actors.

Furthermore, in view of the huge interest from the market and companies in rich-in products, BolognaFiere is set to launch the Functional Food Hub, which will be inserted into the events set to begin in October 2020 as part of Sana Restart and also on the occasion of the 17th edition of MarcabyBolognaFiere 2021 flanking and reinforcing the debut of the Free From Hub where, thanks to the participation of players from the sector and dedicated conventions, it will be possible to take an in-depth look at the most pertinent issues, and follow their evolution and growth within the private label compartment.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6

Durum wheat, extra large harvest in North America

Pastaria Centre for Economic Research

According to analysts' estimates, Canadian and US durum wheat harvests will be very high.

The difference this year is in North America. A bumper harvest is expected in the US and Canada, with durum wheat production on the other side of the Atlantic set to reach its highest levels in thirty years.
For Canada – the world leader in durum wheat production and exports – the upward revision of estimates has been a recurring theme since the beginning of the season. The latest figures, released by Statistics Canada (the official source in Ottawa) at the end of August, put the yield at 6.5 million tonnes (up from 6 million in July), which would place it second only to the historic high of 7.8 million recorded in 2016/17.
Representing Italy's milling industry, Italmopa notes that various factors point to an inevitable increase in imports of durum wheat, of which Italy is the world's leading user.
Underpinning the expectation of greater imports of the product from abroad is the disappointing state of national harvests, affected this year by drought. This has led Italmopa to estimate a supply deficit of at least 40% compared to demand, which is higher than average for recent years.
It should be noted that, in terms of protein content and hectolitre weight of the grain – the technical criteria of most interest to millers and pasta factories – the verdict is positive. But the quantitative issue seems to support the prediction of greater reliance on foreign supplies of the ingredient, making another twelve months of pressure at the borders likely, particularly with regard to Canadian grain.
In light of the most recent upward revision of the estimates, the mosaic of global harvests – the main elements of which are by now evident – suggests a 30% greater harvest in Canada (compared to the previous year), with a 1.8% increase in US production being predicted by the USDA, the American Department of Agriculture, which puts the 2020 figure at 1.68 million tonnes.
British analysts from the International Grains Council are estimating a global harvest of approximately 34.2 million tonnes, representing year-on-year growth of 15%.
A more robust output will not be enough to compensate for stock shortfalls, however, with global reserves from the previous year (barely 9 million

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Table 1 **CANADIAN EXPORTS OF DURUM WHEAT (,000 TONNES)**

Year	World	Italy
2010-2011	3,020.6	751.8
2011-2012	3,392.4	504.5
2012-2013	3,968.2	456.9
2013-2014	4,234.8	889.2
2014-2015	4,441.0	1,364.9
2015-2016	4,014.5	1,112.2
2016-2017	4,060.3	685.6
2017-2018	3,471.6	326.8
2018-2019	4,190.7	554.6
2019-2020	4,623.7	1,019.8

Source: Canadian Grain Commission

tonnes) bringing overall availability to 42.8 million, down 1.6% on the previous year. Global consumption is estimated at 35.1 million tonnes – a slight increase on the previous year – resulting in an ending stock forecast of just 7.7 million by the end of June 2021, the absolute lowest figure since 2015.

Europe is the most vulnerable area. In the EU-27, Brussels' estimates for this year indicate a durum wheat harvest of less than 7.2 million tonnes, the worst result in over ten years. According to calculations by the European Commission, this yield is 17% lower than the average for the last five years, a drop driven by the negative performance in Italy (less than 3.8 million, down over 2% on 2019) and the terrible harvest in France, which, at 1.3 million tonnes, is down 16% on the previous year.

In terms of imports, meanwhile, Istat data from June 2020 give a comprehensive picture of the past trade year, beginning in July 2019. At just below 2.9 million tonnes, imports to Italy of durum wheat from abroad reached a five-year peak, with a year-on-year growth of 45% when averaged out over the twelve months.

It should be noted that over the course of 2019, Italy's imports had already increased by 37% compared to 2018, a trend confirmed in the first half of 2020, which saw 36% growth compared to the same period of the previous year.

Canadian Grain Commission data on Ottawa durum wheat exports confirm the sharp acceleration of sales to Italy, with

the 2019/20 period ending with an increase of 84%. Another point to consider, when reading these figures, is that the million tonnes or more sent to Italy is the highest figure for the last four years, accounting for 22% of all Canadian durum wheat exports. Italy is Ottawa's biggest client, followed by Turkey and Morocco. Earliest indications for the 2020/21 year are also interesting, with the bare figure for July (227,000 tonnes) suggesting an annual growth of 145%, with Italy accounting for 36% of the total.
The record for Canadian exports to Italy was set in 2014/15, at just under 1.4 million tonnes. A result that has the potential to be matched this year, with the likelihood of a policy of discounts and greater Italian reliance on imported grain.

7

Pastificio Palandri

Editorial staff

Pastificio Palandri: the renowned pasta factory from Pistoia, Tuscany, dates back to the end of the nineteenth century.

Aldo Palandri is one of those people you would never stop talking to. Not least of all - and not only - for his kindness: when it comes to pasta, he generously shares his knowledge with anyone who speaks with him about his work. A highly-experienced pasta-maker, Palandri manages the pasta factory of the same name, which was founded at the end of 19th century, and which, with the joining of his children, Monica and Luca, is now in its fifth generation.
This famous pasta factory from Pistoia has an impressive and interesting history. Not only because it spans so many generations, but also because it set the backdrop for the evolution of pasta production in the last century. But the Palandri family has also witnessed or experienced first-hand a series of remarkable events, sometimes joyful, sometimes sad, which recount the past of their business but also, indirectly, that of Italy as a whole. From the transition from production by hand, to the crisis situations generated by the great world wars, from post-war desolation to the economic boom that brought Italy a new era of well-being: a host of events happened both within and outside the walls of this time-honoured pasta factory. Attested by the material - much of which is photographic

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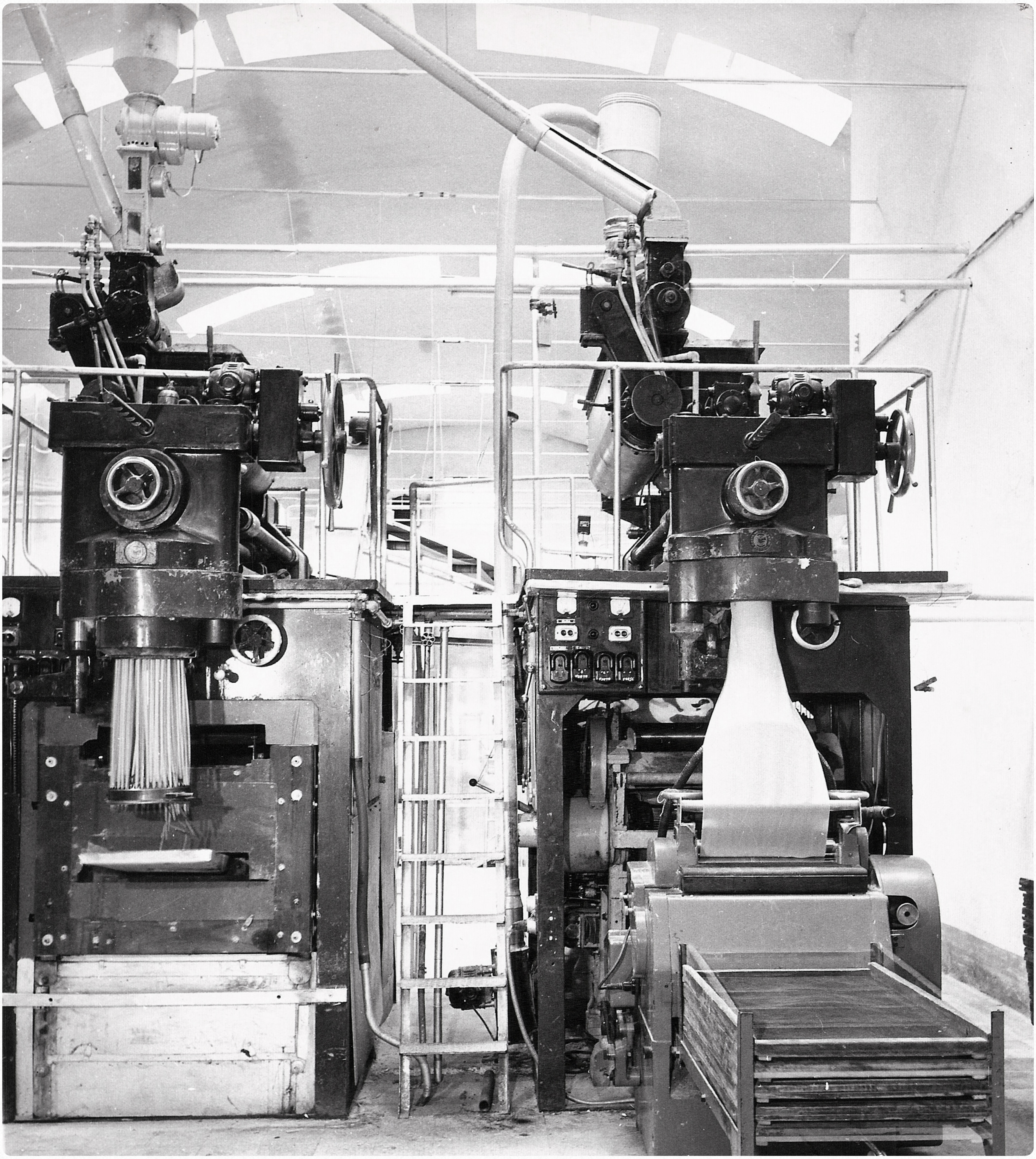
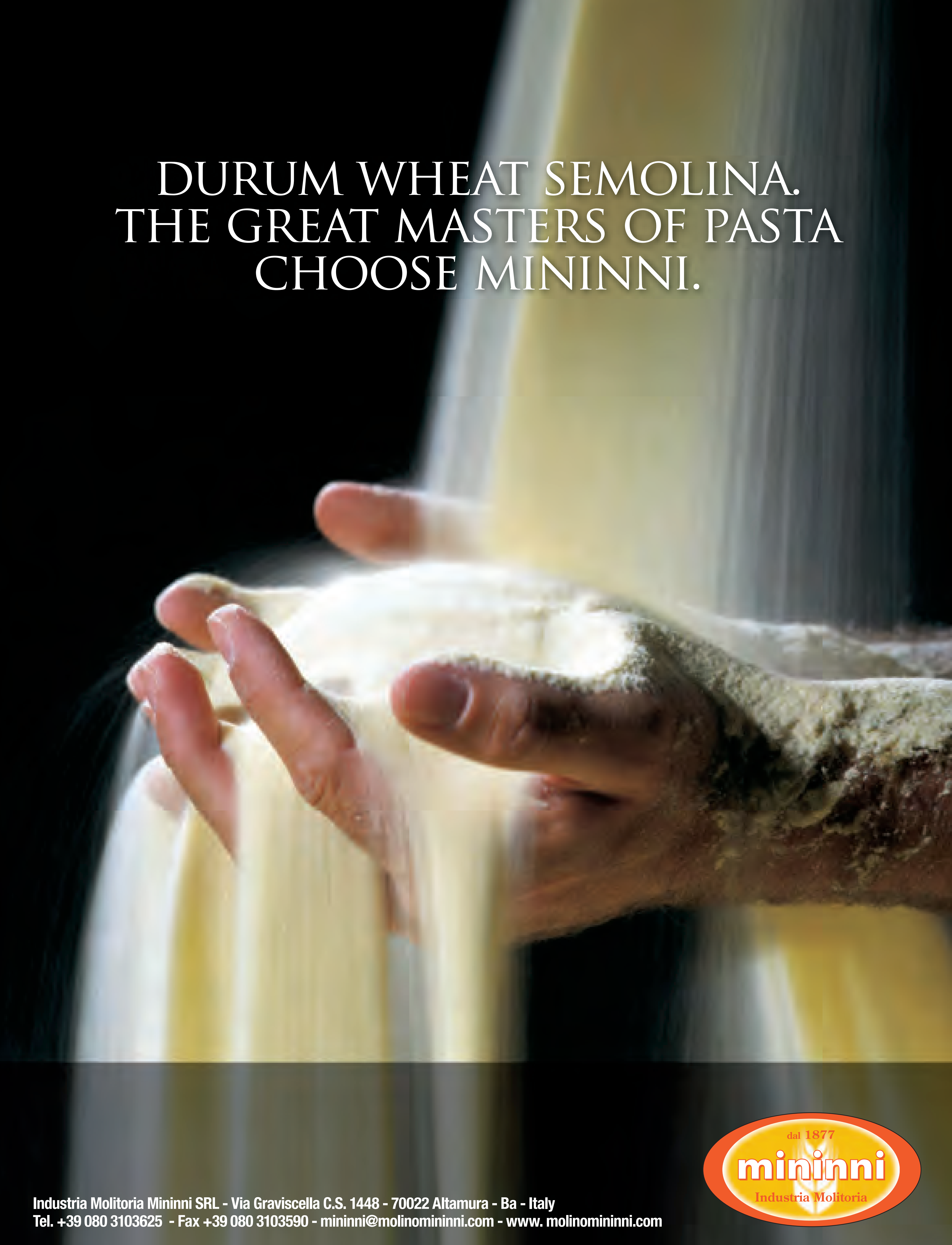


- that the Palandri family has published on its own web site.

The company may have distant roots, but has not foregone the use of modern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means and methods, both in production and in terms of marketing and image.
One striking feature is the project to maintain an artisanal slant in many respects, notwithstanding the use of machinery that allows a certain degree of automation, and hence a significant output. Current production stands at 15,000 kg/day generated by a staff of around ten people, and is divided into organic and traditional, whole grain included. The catalogue contains about a hundred different shapes, and also includes egg pasta.

The supply chain is short, extremely short. For years now the only mill used by Pastificio Palandri is one in the province of Florence that guarantees the Tuscan provenance of the semolina. This is the only flour that the pasta factory uses. The farms that supply the raw material are sometimes the same as those for which the renowned Pistoia pasta factory makes branded pasta.
In order to guarantee that this constant effort to seek out a delicious, top quality, local grain has not been in vain, production is carried out at the pace typical of the

past. Processing is carried out at low temperatures, the production of short pasta has remained virtually unchanged since 1950 and still lasts at least 12 hours, a slow and expensive process that respects the integrity of the precious raw materials used. The pasta produced in this way has a high nutritional value, is very easily digested, contains significant levels of lysine and amino acids, but no furosine and tastes delicious. It is a speciality that embodies the experience of over a hundred years of pasta-making, that is now widely appreciated both in Italy and abroad. In fact, its reference markets are not limited to Tuscany, Lombardy and Piedmont, but also include the United States, Germany and France. Its main sales channels are collective catering, not only canteens, many of which in schools, but also prestige restaurants. There are three lines. The first is the Linea Tradizionale, the Tuscan

line, fruit of gluten-rich grain, bright yellow in colour. The second, called Sapori di Toscana, on the other hand, is wrapped in attractive yellow paper, just like it used to be in the past, and only includes bronze-drawn shapes. Last but not least, 50% of the production is intended for organic pasta, i.e. the Linea Biologica: this is wrapped in green paper, for the immediate recognition of a product made with raw materials grown without the use of fertilizers or pesticides and matured according to the rhythms of the land and the seasons. The pasta is available in a wide variety of sizes ranging from 250 grams right up to to 5 kilos, and can also be packaged to order.

Pastificio Palandri has ISO 9001 - IQNet certification and also displays a No GMO declaration.

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8

Covid: Italian pasta in the red only in the HORECA sector

Pastaria Centre for Economic Research

A look at pasta consumption trends in Italy according to a recent survey published by ISMEA (Institute for Studies, Research and Information on the Agricultural Market) based on Nielsen data.

The difficulties (at least the initial ones) which the Italian milling and pasta industries have had to deal with as a result of Covid-19 containment measures have not, in the macroeconomic data at any rate, had any significant consequences, putting them in a situation of vulnerability that was only contingent and limited, from an operational point of view, to logistics and raw material supplies.

The degree of exposure to the HORECA channel has obviously been a discriminating factor, significantly penalizing (both economically and financially) those companies which primarily have business relations with on-trade players and have subsequently halted supplies to catering and food services.

In Italy, the closure of public establishments as imposed by the anti-contagion regulations implemented during lockdown almost zeroed turnover in the out-of-home eating circuit, also at the expense of suppliers, in particular of fresh pasta, leaving meagre margins for those who at least were able to exploit residual opportunities linked to home deliveries, through the intermediation of distributors/wholesalers or in direct competition with restaurateurs.

In general, the pandemic has without doubt had a less significant impact on the pasta circuit than on other sectors, including food. In relations with modern distribution, 80% of whose activity involves dry semolina pasta (in terms of value, this segment accounts for 50% of departmental sales), it was in fact possible to enjoy a revival that had not been seen for a number of years, in a sector which for some time had become “accustomed” to fractional reductions in household expenditure.

In 2019, according to an ISMEA analysis based on Nielsen data, dry semolina pasta consumption in Italy had confirmed a slow but steady downward trend. The +0.7% of the expenditure recorded in large retail outlets merely reflects the inflationary impetus linked to the 2% increase in consumer prices on an annual basis, while, again in the twelve-month balance sheet, volumes recorded a drop of 1.4%.

The analysis relating to the Italian market notes that in the first half of 2020, in the footsteps traced out by the entire food sector, sales of dry semolina pasta, boosted by the panic buying that drove families to stock up on consumer goods with a long shelf-life, showed renewed vigour, experiencing, compared to the first half of 2019, an increase of 8% in volume and 13.5% in value, in a still inflationary sector context that produced a marked acceleration in the dynamics of retail prices, which on average have risen by over 7%.

The consumption of 100% Italian pasta has had a central role and has been the


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subject of attention also for the major industrial players engaged in repositioning their products and leveraging the label of product origin.
This is a particularly dynamic segment which already last year managed to record double-digit increases, with a 13% growth in both volume and value. This year, throughout June, sales of Made-In-Italy pasta accelerated the pace still further, closing the first half of the year with an annual increase of 23% in quantity and almost 30% in value.
It should be noted that, in relative terms, the incidence of 100% Italian pasta consumption, in relation to the overall figure for dry semolina pasta, has further increased: from a share of 14% in volume and 17% in value in 2019, in the first six months of this year it exceeded 20% in both physical and monetary terms.
In this context, which is in any case positive, the entire pasta sector will have to deal with structural factors that are emerging throughout the modern distribution channel, unhinging traditional structures. According to the experts of the market research company, IRI, one of the most important factors is represented by the marked contraction in assortments available, caused by the "criticalities of supplying points of sale during the frantic initial stage of the emergency and consequent lockdown imposed by the authorities".
To date, despite the health emergency now being more under control, the number of products on the supermarket shelves continues to drop, more than twice as fast as in the pre-Covid phase. The data show that about 80% of the categories of packaged consumer goods with on average more than 10 reference products is decreasing, most of which by up to -5%. The products most affected by this phenomenon are ready meals and food preparations, while no substantial differences emerge in this area between industrial brands and private labels.
In specific departments, particularly in the fresh food and beverage sectors, industrial brand assortments continue to be eroded away by own brand products. In general there is a reorientation of consumer choices towards discounted products and special offers, resulting from the growing economic difficulties many families now face, already evidently advantageous for low-cost channels, first and foremost discount stores.

9

Pastaria Awards 2020: and the winners are...

Editorial staff

The winners of the Pastaria Awards 2020 for best doctoral and master's degree theses on pasta (now at its second edition) have been announced.

The evaluation committee has announced the names of the Pastaria Awards 2020 winners for the best doctoral and master's degree theses on pasta, organised for the second year running by Kinski Editori. This year's edition was characterised by a significant increase in the number of submissions and an overall excellent level of the works received.
The award for the best doctoral thesis was won by Matteo Cibelli (PhD course in Science, Technology and Biotechnology for Sustainability, Tuscia University), with his *Cradle-to-grave environmental profile of organic dry pasta: evaluation and mitigation actions*. Matteo Cibelli will receive €700 in prize money and a diploma issued by Pastaria.
Winners of the award for the two best master's degree theses are Marta Torra (Degree course in Food Science and Technology, University of Milan), with the thesis entitled *The use of cereals, pseudocereals and sprouted legumes in pasta making*, and Francesca Casaretta (Degree course in Food Science and Technology, University of Milan), with her thesis *Legume pasta: role of the raw material and the production process*. The prize for the best master's degree thesis consists of €400 and a diploma issued by Pastaria.
The award ceremony, which was scheduled to take place in Parma, Italy, on 25 September as part of the Pastaria Festival 2020, cannot be celebrated as the next edition of this much-awaited event organised by Pastaria will be held exclusively on-line to safeguard the health of participants in these Covid times.
Summaries of the Pastaria Awards 2020 prize-winning theses will be published as scientific articles in the next issues of Pastaria, starting in October.
Pastaria's editor announces that details on how to participate in the Pastaria Awards 2021 will be published soon.