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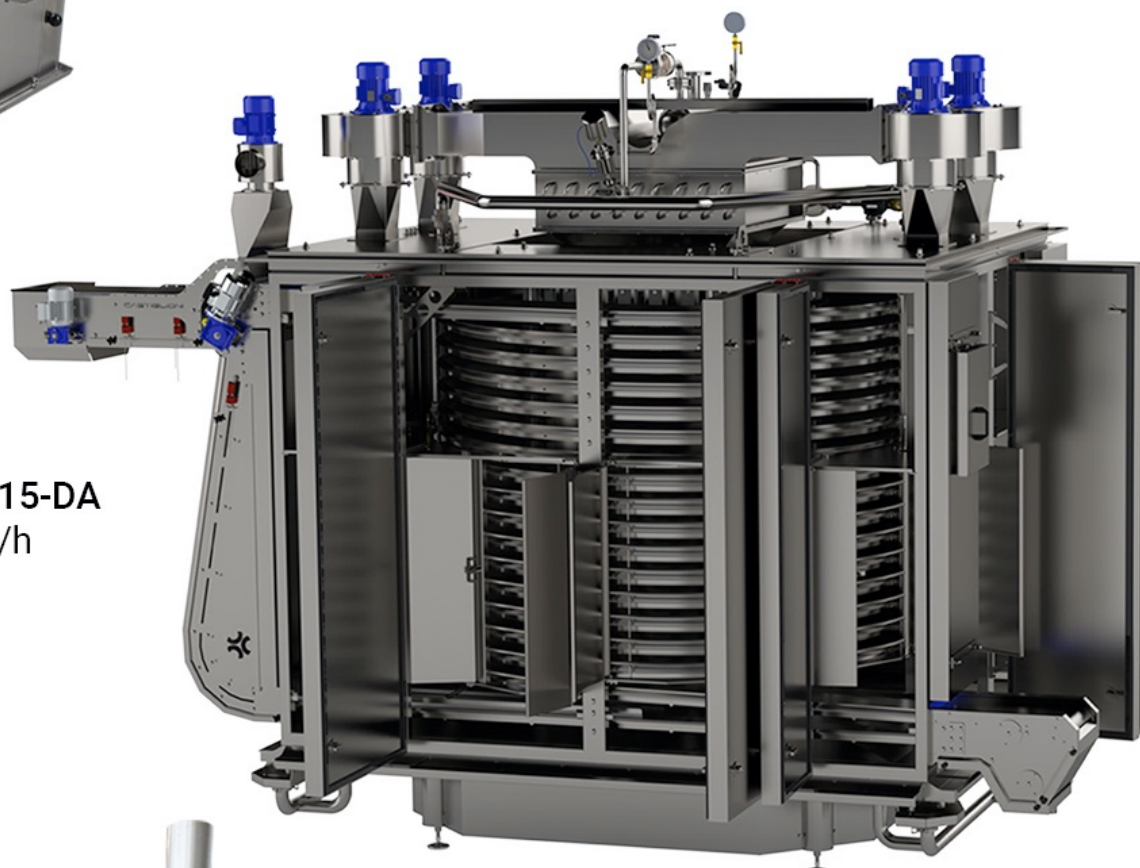
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1



Strampelli

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Situated in the Monti della Laga uplands at Amatrice, the Strampelli pasta factory is a symbol of rebirth and hope following the terrible earthquake that struck central Italy a few years ago.



For information

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The Strampelli pasta factory is more than just a production facility. It is also a symbol of rebirth and hope, for those still feeling the effects of the seismic events that wreaked havoc in Central Italy in 2016 and 2017.

It was a brave move to invest in such a deeply damaged area, which is still struggling to get to grips with the rebuilding work. But siblings Gabriele, Barbara and Attilio Marcozzi – heads of administration, sales and production, respectively, at the Strampelli pasta factory – have never lacked courage. Today they are joined by a new team member, Attilio's daughter Morgana, who recently took her first steps in the world of pasta, promising continuity for a company that shows signs of having a great future ahead of it.

The company premises, which opened in September 2019, are fully earthquake-proof and built at an altitude of 1030





metres in the small town of Collegentileasco in the municipality of Amatrice. They are immersed in the landscape of the Gran Sasso and Monti della Laga National Park, a stunning area of great natural interest. The name evokes the wheat breeding programme carried out by Nazareno Strampelli in the early 1900s, which used pioneering experimentation methods to improve the plant's resistance to certain external agents. He set up a production chain at the Wheat Experimental Station in Rieti that, in the 1920s, produced the "Grani della Vittoria" [Grains of Victory], the result of a painstaking project involving wheat varieties from all over the world.

This initiative was one of the first true examples of globalisation in farming, laying the foundations for global wheat cultivation, with new cultivars that are still used across the world today. Historical name aside, Pastificio Strampelli is a young company, but one that can draw on the experience of its founders. Indeed, the Marcozzi siblings have previous experience in the field, having cut their teeth in Campofilone, an area whose pasta credentials need no introduction. Rather than egg pasta, however, the durum wheat semolina variety is queen here, and is produced exclusively using wheat from the South of Italy and

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exceptionally pure water from the nearby Monte Pizzuto and Monte Velino springs. Loyalty to the local area has also inspired the Marcozzi family, with the help of local farmers, to experiment with an autochthonous cultivar, grown in the uplands, that could soon be used to produce new shapes. The project will help expand the company catalogue, which will also see the introduction of new specialities, all regional and semolina-based.

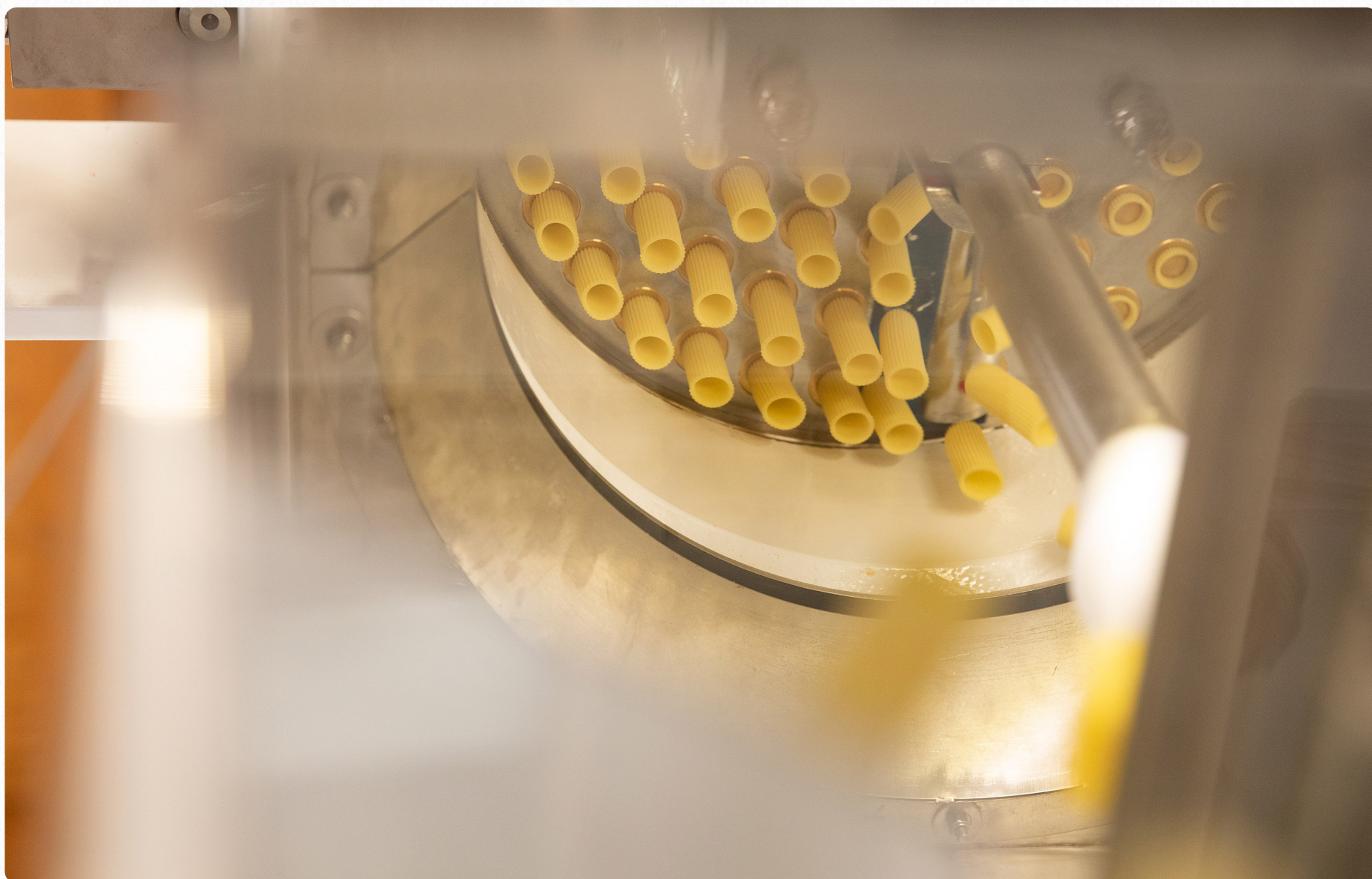
The four shapes currently on the market are those most commonly used for pasta all'amatriciana or alla gricia: Spaghetti, the U-shaped Bucatini "ad archetto", Rigatoni

and Mezzemaniche, which Barbara Marcozzi emphasises are "slow-dried and prepared using artisanal methods, in a unique, uncontaminated environment, where the air is fresh and clean". This is Strampelli pasta, which comes in 500 gram packs that are fully recyclable, right down to the little window in the bags offering a glimpse of the product. This guarantees full and complete sustainability, perfectly in keeping with the company's ethos of protecting the environment. The shade of blue chosen for the packaging, meanwhile, evokes the place where the pasta is produced: high up in the sky, or close enough to seem so.





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Strampelli pasta can be found in delicatessens, restaurants and specialty stores, as well as in leading Italian supermarkets, including as private label products and under the Gusti&Sapori brand.

Unfortunately, Covid interrupted projects that were due to get under way, including the launch of a line made from organic spelt and another from organic semolina, the products of supply chain agreements with local farms. It has also led to delays in obtaining IFS certification. But these are merely short-term setbacks. The Marcozzi siblings approach the situation with the tenacity of people who were born and

raised in the world of pasta. Their determination reveals a conviction that identity – particularly when it is authentic, as is the case with local identity – is the most valuable asset of all, which can open doors to various markets, including on an international level.

Uncontaminated environment, long-standing tradition, artisanal methods and passion combine to make Strampelli bronze-drawn pasta an exceptional product, particularly perfect for preparing the local recipes that have put Amatrice on the map: Amatriciana, of course, and Gricia. Two dishes that have not only become true ambassadors of the “Made in



Italy” brand worldwide, but that have also been awarded the prestigious De.Co. (municipal denomination of origin) designation by the Municipality of Amatrice. An important tool for promoting typical local products, which the Marcozzi siblings have earned in full from the



Municipality of Amatrice, therefore guaranteeing the ingredients used, confirming their local origin, and recognising their composition, thus corroborating their typicality.

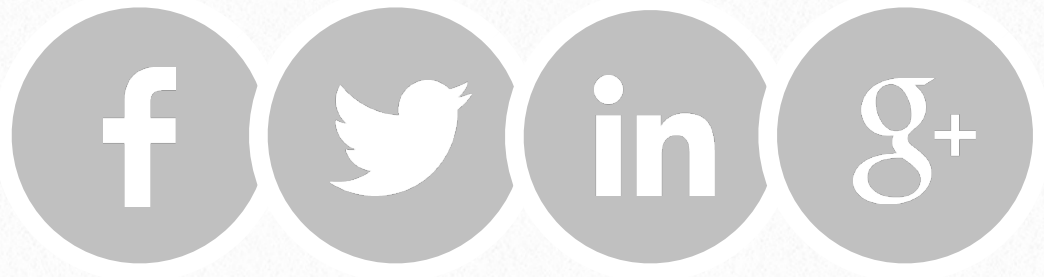


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2



Using sprouted cereals, pseudo cereals and legumes for pasta production

Marta Torra



La valutazione degli effetti dell'aggiunta di sfarinati integrali da cereali (frumento duro, farro e segale), pseudocereali (grano saraceno) e legumi (ceci) germinati – da soli o in miscela con semola di frumento duro – sulle caratteristiche nutrizionali e sul comportamento in cottura della pasta secca è il tema affrontato nella tesi di Laurea Magistrale di Marta Torra, che si è aggiudicata uno dei Premi Pastaria 2020.

L'argomento viene sinteticamente esposto in queste pagine.

Introduction

Pasta is one of the most popular durum wheat products in the world, thanks to its low cost, ease of preparation, sensory and nutritional characteristics (medium-to-low glycemic index) and long shelf-life. (Marti et al., 2013). Additionally, thanks to its high consumption, pasta is an excellent vehicle for bioactive compounds, thanks to which it becomes a healthier, more nutritionally complete food. (Mercier et al., 2016; Sabanis et al., 2006). For this reason, several studies have evaluated the use of functional ingredients and bioactive compounds, deriving from the use of whole-grain cereal flours (Kaur et al., 2012; Ciccoritti et al., 2017), pseudocereals (Chillo et al., 2008; Marti et al., 2011) and legumes (Dimitrios et al., 2006; Sozer et al., 2017) for the production of enriched pasta.

In recent years, interest in sprouted grains has been growing due to the fact that the sprouting process is associated with numerous nutritional and sensory improvements in the seeds. (Hübner et al., 2013). For example, the synthesis and/or activation of hydrolytic enzymes during the sprouting process help reduce anti-nutritional factors (e.g. phytic acid in the case of wheat) and the factors in legumes responsible for causing flatulence

(Fermentable Oligo-, Di-, Mono-saccharides And Polyols – FODMAP). Recently, sprouted cereals have been added as ingredients to baked products and other goods such as snacks and breakfast cereals; they are also used for fortifying baby products. (Wu & Xu, 2019). To date, however, the use of these raw materials in formulations for pasta is still limited. To this end, at the request of a manufacturer of organic pasta, the aim of this study was to evaluate the effects of adding sprouted whole-grain cereal flours (durum wheat, spelt and rye), pseudocereals (buckwheat) and legumes (chickpeas) – either alone or mixed with durum wheat semolina – on the nutritional characteristics and cooking behaviour of dried pasta.

Materials and methods

Production of the sprouted raw materials

The sprouting process was conducted at Molino Quaglia S.p.A. (Vighizzolo d'Este, Padua, Italy) on a pilot system, at a temperature of 20°C, with 90% relative humidity for 36-48 hours. The sprouted samples were then dried at 50°C until their moisture content was 13%. At the end of the sprouting process, the samples were milled, to obtain the various types of flour.



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Table 1 FORMULATION OF EXPERIMENTAL (S) AND COMMERCIAL (C) PASTA SAMPLES

S Samples	Ingredients
CTRL	“Control” semolina
S_Dg	80% Semolina + 20% sprouted whole durum wheat
S_Sg	80% Semolina + 20% sprouted rye
S_Dg_Sg	80% Semolina + 10% sprouted whole durum wheat + 10% sprouted rye
Dg	100% sprouted durum wheat semolina
Dg_F_C	85% sprouted whole durum wheat semolina + 7.5% sprouted chickpeas + 7.5% sprouted spelt
Dg_F_C_GS	85% sprouted whole durum wheat semolina + 5% sprouted chickpeas + 5% sprouted buckwheat + 5% sprouted spelt
C Samples	Ingredients
Semolina	100% durum wheat semolina
Whole Semolina	100% whole durum wheat semolina
Spelt	100% whole spelt flour (<i>Triticum dicoccum</i> L.)
Multicereal	80% durum wheat semolina + 8% spelt flour + 8% barley flour + 3% corn flour + 1% rye flour

Production of the pasta samples

The pasta samples ([Table 1](#)) were produced using the pilot systems of DeFENS (University of Milan Milano). Specifically, the flours were kneaded for 10 minutes in a continuous press (Braibanti, Milan, Italy) and extruded (extrusion pressure = 9 MPa) in the shape of macaroni. The temperature of the dough was maintained at 40°C thanks to a jacket cooling system. The pasta samples were then dried in a drying cell (Braibanti, Milan, Italy) at a maximum temperature of 60°C for 17 hours. For the purpose of characterizing their compositional and

enzymatic profile and starch properties, the pasta samples were milled using an IKA-Universal mill M20 (IKA Laborotecnic, Staufen, Germany), to obtain flour with a grain size of less than 250 µm.

The experimental samples were further compared with four samples of commercially purchased dried pasta, the formulation of which is shown in [Table 1](#).

Centesimal analysis and α -amylase activity

The soluble and insoluble fibre content of the pasta samples was determined in accordance with AOAC method 991.43 (AOAC, 1995). The protein, starch and ash

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content was quantified in accordance with AACC methods 46-12.01, 76-13 and 08-12, respectively (AACCI, 2001). The simple sugar content was then determined by means of HPLC (High Performance Liquid Chromatography) with ion exchange column connected to a pulsed amperometric detector.

Lastly, the α -amylase activity of the pasta samples was determined in compliance with AACC method 22-02.01 (AACCI, 2001).

Starch properties

Susceptibility of starch to the action of α -amylase

The susceptibility of starch granules to the action of α -amylase was determined in accordance with AACC method 76-31 (2001).

Micro Visco-Amylo-Graph analysis (MVAG)

The gelatinization and retrogradation properties of the starch were determined using a Micro Visco-Amylo-Graph® (Brabender GmbH & Co., Duisburg, Germany), by dispersing 15 g of sample in 100 mL of water or 1 mM of silver nitrate solution (AgNO_3) while stirring (250 min^{-1}). The temperature profile applied to the suspension in question was as follows: heating from 30°C to 92°C ($+7.5^\circ\text{C}/\text{min}$),

maintaining the temperature at 92°C for 5 min, then cooling from 92°C to 30°C ($-7.5^\circ\text{C}/\text{min}$) and maintaining the temperature at 30°C for 1 min.

Pasta characterization

Colorimetric analysis and surface appearance

A colorimetric analysis was conducted on the pasta samples using the Minolta CR-300 *Chroma meter* CR-300 (Minolta Camera Co., Osaka, Japan), connected to a pulsed xenon lamp for reflected light measurements. Colour was expressed using the colour spaces defined by the International Commission on Illumination in 1976 (CIE- $L^*a^*b^*$).

The pasta samples were captured at dpi (dots per inch) resolution using a scanner (Epson Perfection 550 Photo, Seiko Epson Corp., Japan).

Cooking behaviour of the pasta

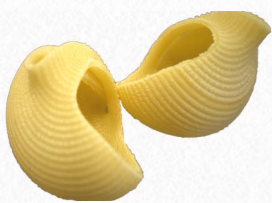
The Optimal Cooking Time (OCT) of the pasta samples was determined in accordance with AACC method 66-50.01 (AACCI, 2001), while their water absorption capacity was determined by cooking 25 g of pasta in 250 mL of distilled water, without salt. The amount of water absorbed was calculated by means of the formula below:



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$$\text{water absorption (\%)} = [(final\ weight - initial\ weight) / initial\ weight] * 100$$

While the weight of the solids lost during cooking was measured using AACCC method 66-50.01 (AACCI, 2001).

Water absorption and the loss of solids during the cooking of the pasta samples were measured both at OTC and after overcooking (OCT+20%).

Shear-compression and extrusion test

The firmness of the OCT and overcooked pasta samples was evaluated by means of a shear-compression and extrusion test using a Kramer cell connected to a Zwick Z005 dynamometer (Zwick GmbH & Co., Ulm, Germany), equipped with a 5kN load cell.

The dynamometer recorded the resistance presented by the sample, during the compression phase, in a graph showing strain on the x axis (distance in mm) and sample resistance on the y axis (Force of N).

Statistical analysis

The compositional analysis, the determination of the α -amylase activity, the susceptibility of the starch to enzymatic action and the Micro Visco-Amylo-Graph analysis were

replicated twice, while, the colorimetric analysis was repeated six times. For the purpose of determining water absorption, loss of solids during cooking and pasta firmness, five independent cooking tests were carried out.

The statistical analysis (one-way analysis of variance (ANOVA)) was conducted using Statgraphics Plus 5.1 software (Statpoint Inc., Warrenton, VA, USA). The different samples were considered as factors for the ANOVA and, when a factor showed statistical significance ($p \leq 0.05$), Tukey's HSD statistical test was performed to determine significant differences between the respective means.

Results and discussion

Centesimal analysis

As can be seen in [Table 2](#), replacing 20% of unsprouted wheat semolina with sprouted whole durum wheat or rye flour brought about a significant increase in the simple sugar and total fibre fractions, compared to the CTRL sample. Similar results were obtained by replacing (20%) unsprouted wheat semolina with a mixture of 10% sprouted whole wheat semolina and 10% sprouted rye flour. As expected, the simple sugar and total fibre content increased as the percentage in the formulation of whole-grain flour obtained



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Table 2 CENTESIMAL COMPOSITION OF THE EXPERIMENTAL PASTA SAMPLES. MEAN±STD DEV. (N=2). DIFFERENT LETTERS IN THE SAME COLUMN INDICATE SIGNIFICANT DIFFERENCES BETWEEN THE SAMPLES (TUKEY HSD TEST; P<0.05)

Samples	Humidity (%)	Protein (% d.m.)	Starch (% d.m.)	Sugar (% d.m.)	Total fibre (% d.m.)	Ins. Fibre (% d.m.)	Sol. Fibre (% d.m.)	Ash (% d.m.)
CTRL	9.1 ± 0.1 ^f	12.7 ± 0.1 ^{bc}	68.2 ± 0.7 ^c	4.7 ± 0.4 ^a	3.7 ± 0.2 ^a	2.2 ± 0.0 ^a	1.4 ± 0.2 ^a	1.02 ± 0.02 ^a
S_Dg	8.8 ± 0.0 ^e	12.6 ± 0.0 ^{bc}	66.1 ± 2.4 ^{bc}	9.9 ± 0.6 ^{bcd}	4.7 ± 0.3 ^b	3.6 ± 0.1 ^b	1.2 ± 0.2 ^a	1.13 ± 0.05 ^a
S_Sg	8.6 ± 0.1 ^d	12.2 ± 0.0 ^b	64.5 ± 1.6 ^{bc}	8.6 ± 0.4 ^{bc}	5.1 ± 0.3 ^b	3.3 ± 0.1 ^b	1.8 ± 0.2 ^a	1.02 ± 0.01 ^a
S_Dg_Sg	9.1 ± 0.0 ^g	12.3 ± 0.1 ^b	64.4 ± 2.6 ^b	8.3 ± 0.3 ^b	4.9 ± 0.3 ^b	3.3 ± 0.0 ^b	1.6 ± 0.3 ^a	1.06 ± 0.02 ^a
Dg	8.2 ± 0.0 ^a	11.4 ± 0.2 ^a	55.2 ± 1.5 ^a	14.4 ± 0.3 ^e	11.9 ± 0.1 ^c	10.2 ± 0.1 ^c	1.6 ± 0.0 ^a	1.64 ± 0.08 ^b
Dg_F_C	8.3 ± 0.0 ^b	13.0 ± 0.2 ^{cd}	54.6 ± 2.1 ^a	10.4 ± 0.2 ^d	11.5 ± 0.7 ^c	9.8 ± 0.4 ^c	1.7 ± 0.4 ^a	2.22 ± 0.03 ^c
Dg_F_C_GS	8.4 ± 0.1 ^c	13.2 ± 0.1 ^d	53.4 ± 1.5 ^a	10.0 ± 0.4 ^{cd}	11.5 ± 0.3 ^c	10.1 ± 0.0 ^c	1.5 ± 0.3 ^a	2.21 ± 0.04 ^c

from sprouted matrices increased. The higher content of simple sugars in products formulated with sprouted matrices is mainly related to the hydrolytic action of the α -amylase developed during the sprouting process (Simsek et al., 2014), while the increase in the total fibre content is due to the use of whole-grain flour or matrices that are richer in fibre than sprouted whole durum wheat flour. From this perspective, for example, rye has a higher total fibre content (17g/100g_{d.m.}; Grausgruber et al., 2004) than durum wheat. (10.7-15.5g/100g_{d.m.}; Gebruers et al., 2008). The fibre content of the samples formulated entirely with sprouted raw materials, Dg_F_C, Dg_F_C_GS and Dg is significantly higher both than the fibre content determined for

the other experimental samples and the fibre content indicated on the label of the commercially-purchased enriched samples, spelt, multicereal and whole-wheat semolina.

With regard to the protein content, replacing 20% of semolina did not, in general, bring about significant variations for this index. For samples consisting entirely of sprouted whole durum wheat semolina, there was a significant decrease in the value of this index compared to CTRL, probably attributable to the higher percentage of fibre content. The other two fibre-rich samples, Dg_F_C and Dg_F_C_GS, show the highest protein values. In this case the additions of 5% spelt, 5% chickpeas and 5% buckwheat, in the Dg_F_C_GS sample, and of 7.5%

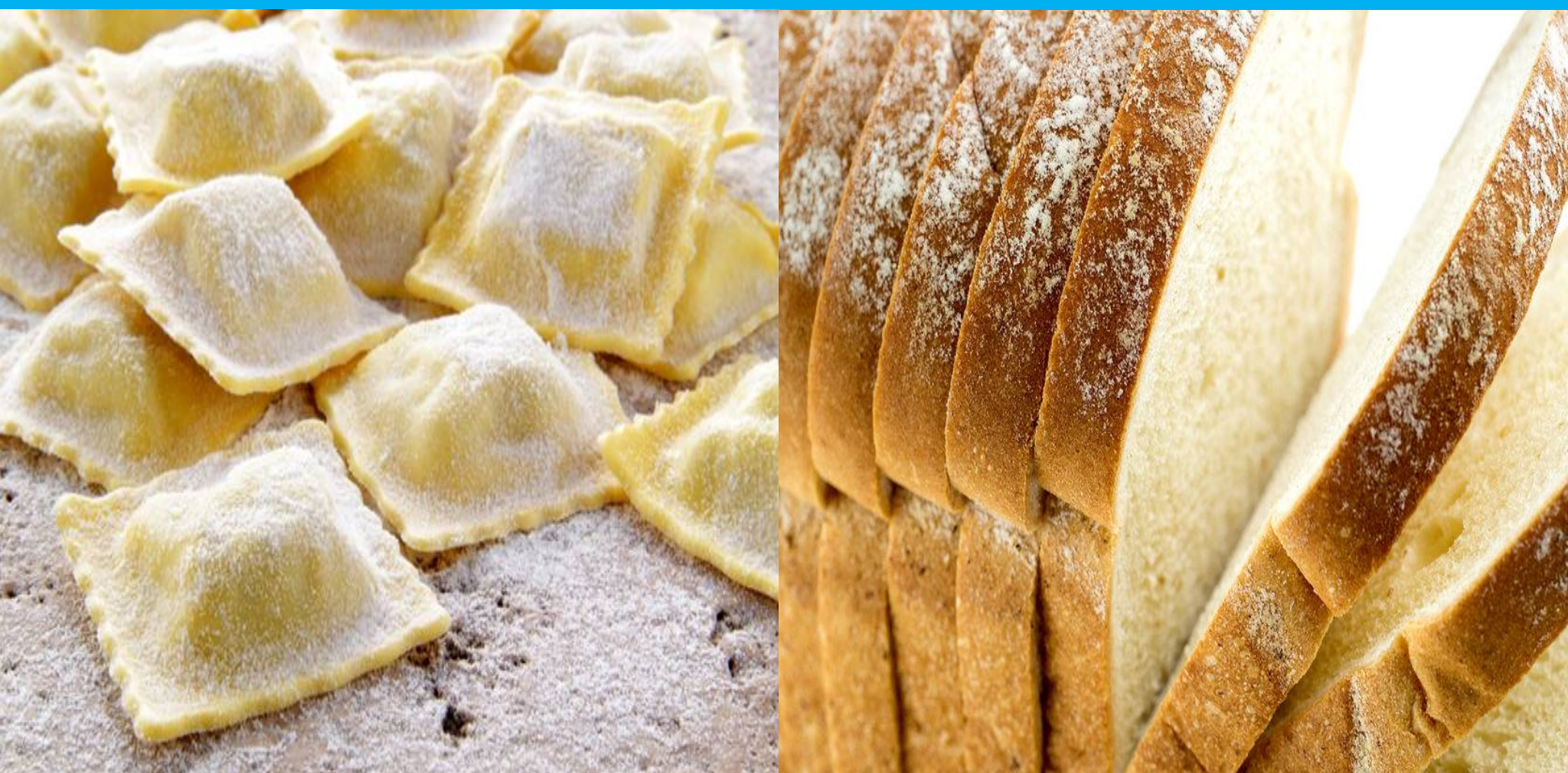
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chickpeas and 7.5% spelt in the Dg_F_C sample, resulted in an increase of approx. +2% in protein content, compared to the sample formulated with sprouted durum wheat (Dg) only. The protein content of chickpeas (about 20%_{d.m.}) is higher than the protein content of durum wheat (Milán et al., 2019), so it can be assumed that this increase is mainly attributable to the differences in the formulations.

Starch properties

The Micro Visco-Amylo-Graph analysis, carried out both with and without amylase inhibitor (AgNO₃), showed that the controlled sprouting process did not drastically affect the gelatinization and retrogradation properties of the starch, but these properties could be compromised during the cooking of the product. (Grassi et al., 2018). Replacing 20% of refined rye with sprouted raw materials brings about a decrease in the maximum viscosity value (S_Dg ~426 BU, S_Sg ~506BU, S_Dg_Sg ~517 BU) compared to CTRL (779 ± 14 BU) which corresponds to a higher susceptibility to hydrolysis by α-amylases (22.4±0.8 g/100g_{d.m.} of S_Dg compared to 15.7±0.7 g/100g_{d.m.} of CTRL). Maximum viscosity values are further reduced in samples formulated entirely with flours obtained from sprouted raw materials. The lower maximum viscosity value is that

determined for the sample of 100% sprouted whole durum wheat (240±10 BU), which is also the sample most susceptible to hydrolysis by α-amylase (31.8 ± 1.0 g/100g_{d.m.}).

Pasta characterization

Colorimetric analysis

With regard to colorimetric analysis, the presence of whole-grain flours from sprouted matrices brought about a significant decrease in the yellow index (b*); due mainly to the presence of carotenoids (Borrelli et al., 1999) and a significant increase in the brown index (100-L*). The only exception was the sample containing 20% of sprouted whole durum wheat semolina, which showed b* index values similar to those of the CTRL sample.

The significant increase in the brown index values of formulations containing whole-grain flour can be attributed to the higher presence of bran compared to refined semolina samples. (Mercier et al., 2016). Moreover, this increase could also depend on the formation of brown compounds due to Maillard's reaction, following the use of raw materials rich in simple sugars, such as flour from sprouted matrices. (Marti et al., 2015).

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Table 3 QUALITY INDICES IN COOKING: OCT, ABSORPTION CAPACITY, COOKING LOSSES AND TEXTURE (AT OCT AND AFTER OVERCOOKING). MEAN.±STD.DEV. DIFFERENT LETTERS IN THE SAME COLUMN INDICATE SIGNIFICANT DIFFERENCES BETWEEN THE SAMPLES (TUKEY HSD TEST; P≤0.05)

Sample	OCT (min:s)	Water absorption – OCT (%)	Water absorption – overcooking (%)	Cooking losses – OCT (g/100g d.m.)	Cooking losses – overcooking (g/100g d.m.)	Maximum force OCT (N)	Maximum force – overcooking (N)
CTRL	09:30	93.6 ± 1.1 ^e	108.2 ± 2.5 ^e	3.5 ± 0.1 ^a	3.8 ± 0.2 ^a	571 ± 50 ^e	458 ± 5 ^d
S_Dg	08:00	88.1 ± 0.4 ^{cd}	99.4 ± 0.9 ^d	5.0 ± 0.2 ^e	5.4 ± 0.3 ^b	469 ± 12 ^{cd}	390 ± 22 ^b
S_Sg	08:30	88.1 ± 1.8 ^{cd}	98.6 ± 1.7 ^{cd}	5.4 ± 0.1 ^f	6.4 ± 0.4 ^c	435 ± 16 ^{bc}	407 ± 12 ^{bc}
S_Dg_Sg	08:00	85.8 ± 0.8 ^c	98.1 ± 0.7 ^{cd}	4.6 ± 0.2 ^d	5.5 ± 0.3 ^b	522 ± 26 ^{de}	437 ± 22 ^{cd}
Dg	06:30	76.9 ± 0.5 ^a	85.0 ± 1.3 ^a	7.9 ± 0.3 ⁱ	9.6 ± 0.3 ^f	384 ± 16 ^{ab}	307 ± 14 ^a
Dg_F_C	07:30	86.9 ± 0.5 ^{cd}	97.4 ± 1.9 ^{cd}	7.3 ± 0.2 ^h	7.9 ± 0.4 ^{de}	354 ± 23 ^a	317 ± 22 ^a
Dg_F_C_GS	06:00	81.2 ± 0.5 ^b	90.6 ± 2.1 ^b	7.5 ± 0.2 ^h	7.8 ± 0.2 ^d	338 ± 21 ^a	299 ± 10 ^a

Determination of optimal cooking time, water absorption capacity and loss of solids during cooking

Replacing semolina with sprouted raw materials brought about a reduction of the Optimal Cooking Time (OCT) (Table 3). The reduction of OCT in samples formulated with sprouted cereal flours could be due to replacing a flour that has a high quality gluten matrix with another that has a weak matrix, such as that of a sprouted wheat flour, due to the result of the proteolytic action developed during the sprouting process. (Value & Nemzer, 2019). This result could also be due to the use of whole-grain flours, since bran physically interferes with the gluten matrix (Manthey et al., 2002) and with the dilution of

gluten-forming proteins. Additionally, the reduction of OCT in formulations containing gluten-free raw materials could be due to the dilution of the gluten. With regard to water absorption capacity (event related to the ability of proteins and starch to solvate and retain water), the presence of sprouted materials brought about a significant reduction of this index. Specifically, the amount of water absorbed decreased as the amount of flour in the formulation from sprouted matrices increased. In fact, the reference sample (CTRL) had the highest water absorption value, while the 100% sprouted durum wheat semolina sample had the lowest water absorption value (data shown in Table 3). The presence of a less uniform

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gluten matrix due to the presence of fibre and gluten-free raw materials might lead to a lower tendency to retain absorbed water. Irrespective of the matrix used and the amount of semolina replaced, all enriched pasta samples tended towards a statistically higher loss of solids during cooking than the reference sample, both at OCT and after overcooking ([Table 3](#)). Also with respect to losses, there is a relationship between the percentage of whole sprouted raw material in the sample and the increase in losses during cooking. 100% sprouted samples have statistically higher cooking losses than samples enriched with 20% of sprouted raw material. There are no significant differences with regard to the material released in the water in Dg_F_C and Dg_F_C_GS, which is more than double that released by the CTRL both at optimal cooking time and after overcooking. The increase in cooking losses could be related to the higher fibre content (Kaur et al., 2012), since the addition of bran leads to both an increase in the content of water-soluble compounds in the finished product and interruption in the gluten matrix. (Kunerth & Youngs, 1984). A non-homogeneous gluten matrix might not be able to retain starch and soluble compounds within its structure, resulting in the release of solids into the cooking

water. (Tudorică et al., 2002). Although the solids lost in the cooking of experimental pasta types Dg, Dg_C_F, Dg_C_F are statistically higher than those of the commercial samples taken as reference in this study, the values are consistent with those obtained in other studies on pasta enriched with legumes and pseudocereals already available in literature. (Arab et al., 2010; Flores et al., 2014; Karpagavalliet al., 2015; Zhao et al., 2006).

Shear-compression and extrusion test

With regard to the analysis of pasta firmness, as shown in [Table 3](#), the substitution of 20% of sprouted whole-wheat semolina resulted in a significant reduction of the maximum strength parameter. As expected, the presence of 100% sprouted durum wheat resulted in a further reduction in firmness parameters, resulting in a firmness value of ~384N.

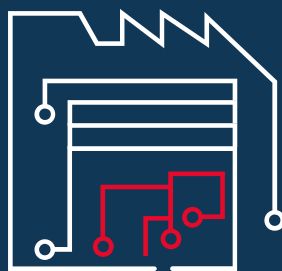
The experimental samples with the most complex formulations – Dg_F_C, and Dg_F_C_GS – proved to be the samples with the lowest Firmness value both at optimal cooking time and after overcooking ([Table 3](#)). The reduction in the firmness of pasta seems to be closely related to the content of sprouted raw materials rich in fibre and the presence of raw materials without gluten-forming

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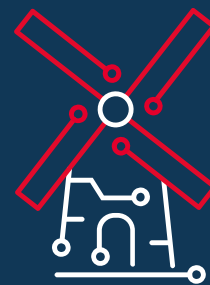
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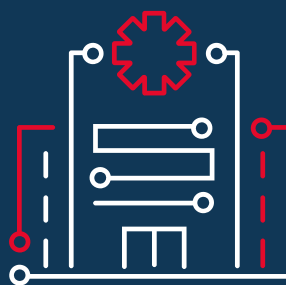
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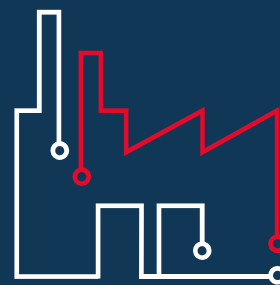
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proteins; both of these elements can weaken the protein and starch matrix, causing a decrease in the firmness of the pasta.

Conclusions

The use of flours obtained from cereals, pseudocereals and sprouted legumes in the formulation of dried pasta brings about a general improvement of the nutritional profile, following the increase in protein and/or fibre content. Although these samples have a lower cooking quality than semolina pasta, the values of the indices used for the characterization of the pasta during cooking can be considered acceptable and guarantee the good quality of the finished product. In particular, the cooking behaviour of experimental pasta S_Dg,S_Sg,S_Dg_Sg, – the samples with 20% of added sprouted cereals – was in line with that of the commercial samples prepared from whole-grain cereals. Starting from these results, future prospects should include the optimization of process parameters in order to eliminate surface defects and improve the quality during cooking of pasta made entirely from cereals, pseudocereals and sprouted legumes. Additionally, it will be necessary to evaluate the effect of the addition of these sprouted raw materials on the

digestibility of the starch in the finished product.

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3



Sebadas, forging ahead towards Protected Geographical Indication (PGI)

Editorial staff



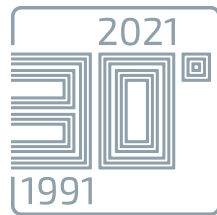
An application to obtain Protected Geographical Indication has recently been submitted for the Sardinian speciality, Sebadas.

If granted by the European Union, Sardinia's Sebadas would become the sixth Protected Geographical Indication granted to the pasta sector in Italy, after Maccheroncini di Campofilone, Cappellacci di Zucca, Pasta di Gragnano, Culurgionis d'Ogliastra and Pizzoccheri della Valtellina – all PGI.

The Italian first course par excellence, pasta forges its way into the complex world of European designations, albeit somewhat behind other typical products. Attesting to its great versatility, Sardinia has filed an application for a product which, although made of filled pasta, is normally served as a dessert and is considered as such, to all intents and purposes, on the menu. This typical product has two special characteristics. Firstly, rather than being boiled in water, the sebada is fried in oil. Secondly, it is eaten after being covered in honey, white sugar or – deviating from the original recipe – in sweet sauces or jams. The mouthwatering image of these special big round ravioli is certainly not a disappointment to the palate: the delicate, crispy pastry made with the addition of lard, gives way to a melted stringy cheese filling flavoured with citrus peel, in a unique combination of contrasting tastes. At the moment there are ten small craft enterprises in the fresh pasta sector,

backed by the CNA (National Confederation of Crafts and SMEs), on the Committee that has, in recent weeks, presented the application for Protected Geographical Indication to the Ministry of Agricultural, Food and Forestry Policies and the Sardinian Regional Department for Agriculture. Promoters include – but are not limited to – the major Sardinian producers of Sebadas and the more structured pasta factories. They are as follows: La Casa della Nonna of Bolotana, Laboratorio di Pasta Fresca & Pasticceria di Richard Marci of Cardedu, Contini di Santa Giusta pasta factory, Calitai pasta factory of Cagliari, Antonio Cossu pasta factory of Iglesias, I Sapori d'Ogliastra di Vito Arra of Lanusei, La fornarina di Marco Orrù bakery of Cagliari, Biscottificio Demelas biscuit factory of Stintino and La Sfoglia d'Oro of Sassari.

The average annual production estimated in Sardinia is approx. 1,625,000 units, 130,000 kg, worth over 1,300,000 euros in turnover, involving more than 200 companies and 250 workers. These numbers are not large, of course, but they are on the increase. There is also a portion of production that escapes the surveys, because it is produced not in pasta factories but on agritourism farms and in restaurants. Sebadas have now become a constant feature where typical cuisine is



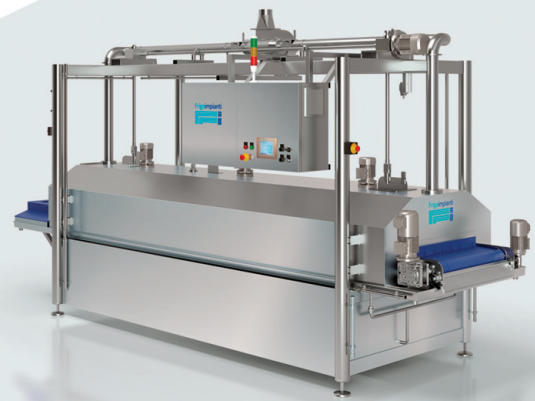
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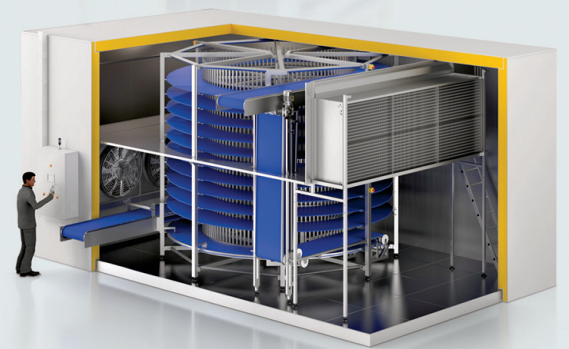
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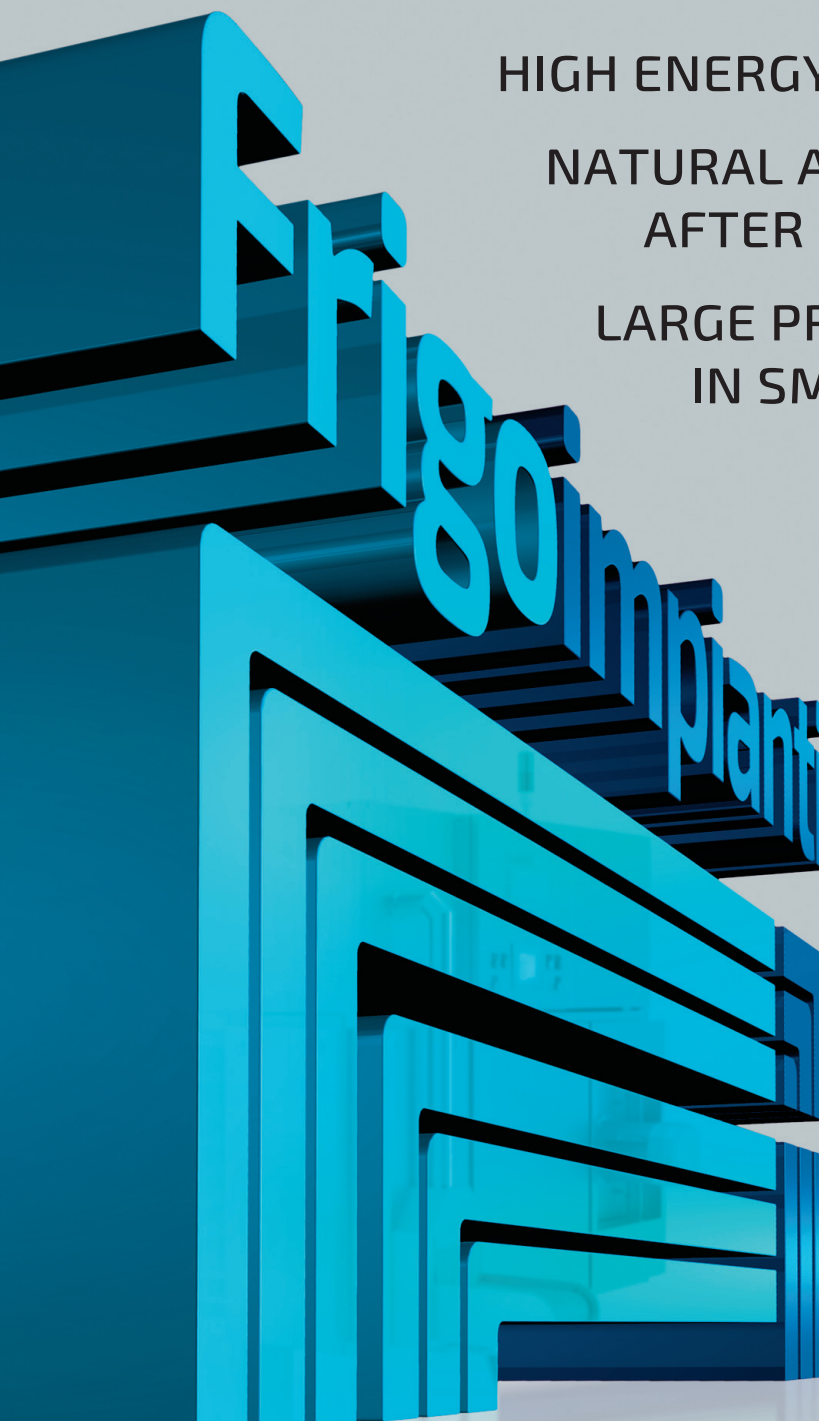
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offered, but not only there. There is, practically, no place on the island where they are not prepared. And in the meantime, the first sebaderie are being set up, serving only Sebadas, but in every imaginable way.

This typical dish unites three supply chains that make major contributions to sustaining the regional economy: sheep and pig breeding and cereal production, and it is a unique speciality through which Sardinia expresses the very best of its local gastronomic culture. The purpose of the PGI application is to protect the name of this speciality, but also to give due respect to the know-how of pasta

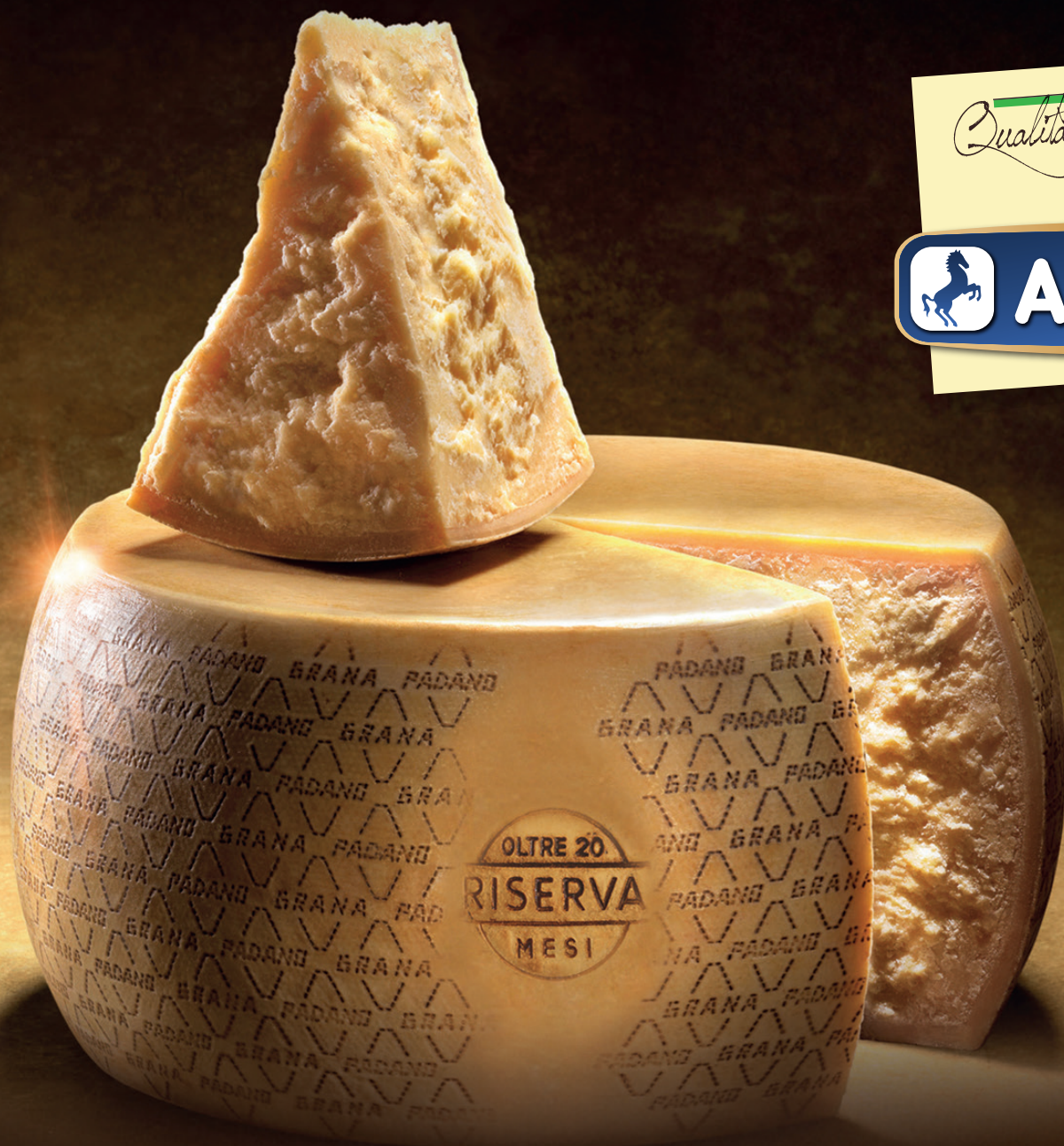
producers who, with their daily commitment, renew their bond with a regional culinary tradition that is also an expression of the island's culture and identity.

The product specification, which strictly follows the traditional recipe, provides for minor variations on the basis of the local tradition, which may differ slightly from town to town. The differences mainly concern the size, and hence also the weight, of the pasta shape, which may be either round or oval; the flavouring with either lemon or orange, but, first and foremost, the type of cheese used for the filling: sheep or goat's cheese where sheep

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farming was particularly widespread, and cow's cheese in areas where, in the past, there were also dairy cattle farms. In this regard, the Sebadas of Casizzolu, a typical product of the Montiferru and Barigadu areas, are particularly famous. The richness of the Sardinian gastronomic heritage, in fact, lies not only in the distinctiveness of products that do not exist outside of the island, but also in the slight differences from area to area, underlining the craftsmanship of the product and its close link with the territory that makes it.

Franco Calisai, owner of the La Sfoglia d'Oro pasta factory in Sassari and chairman of the Comitato promotore

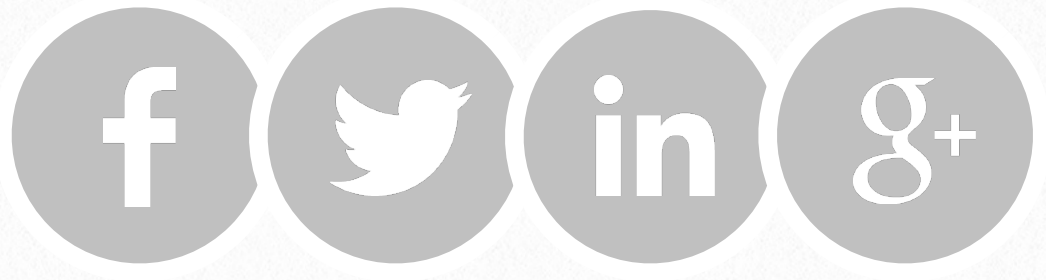
Sebadas di Sardegna IGP – the committee campaigning to gain PGI status for this speciality – presents the work involved in the submission of the application: “We aim to bring Sebadas into the Olympus of international gastronomic excellence, by acquiring a designation that will be, first and foremost, a protection for consumers and for producers of quality pasta. We have been working on this project for years and now – thanks also to the support of the Sardinian branch of CNA Alimentare – we have succeeded in rallying the companies and starting a process of protection and ennoblement of one of Sardinia's most characteristic products”.



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4



The effects of the COVID crisis propels dry pasta to new heights

Editorial staff



Nielsen: year-to-date figures as at 13 September 2020 confirm a return to the origins, with 6.2% annual growth in sales in terms of quantity, and 11.2% growth in terms of value. But the crisis is polarising consumption and accelerating the shift towards the digital channel. Italian origins remain a winning point of differentiation, with new models being driven by the domestic world. The situation was discussed at the conference entitled *Pasta consumption and the pandemic: global scenarios and trends*, held at the most recent edition of the Pastaria Festival.

Disruption on a global scale. With unprecedented social, health and economic implications. All GDP fluctuations culminated in negative territory once the COVID-19 emergency took hold. And it appears that we are facing an economic crisis of epoch-making magnitude.

This is the conclusion now being drawn by all forecasts that, in 2020, point to a scenario of deep global recession. A symmetrical crisis, with implications for demand and supply, triggered by an unprecedented shock that has thrown expectations into disarray on a range of fronts, profoundly altering purchasing behaviour, among other things.

In her presentation at Pastaria Festival 2020, Sara Beretta, food expert for the Nielsen research and data analytics company, offered an interpretation of the new trends in the retail market, in light of the recession scenario, outlining the emerging phenomena and potential evolutions.

In the fast-moving consumer goods segment (FMCG), the crisis in Europe, as in other parts of the globe, has highlighted the anti-cyclical characteristics of the food world, characterised by sustained growth and, above all, a marked counter-trend with regard to the dynamics observed in other sectors; this echoes the dynamics previously observed during the Great Recession of 2008-2009.

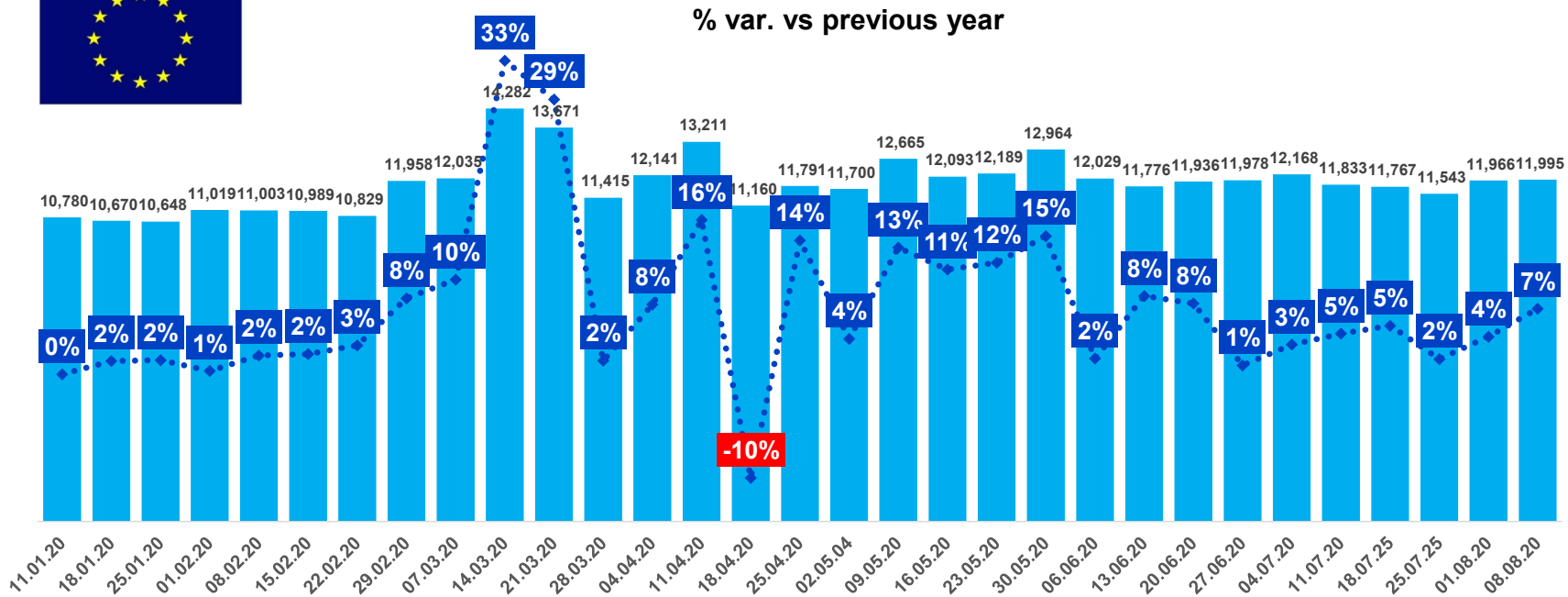
The top markets analysed by Nielsen (Germany, UK, France, Italy and Spain) saw the fast-moving consumer goods (FMCG) trolley – the lion's share of which is made up of food – enjoy a double-digit growth peak in the height of the stockpiling phase following the introduction of anti-COVID measures, while the post-lockdown period has seen a continuation of the positive trend at a more moderate, but nonetheless significant, rate, with growth estimated at around 5%.

The same phenomenon has been observed on the other side of the Atlantic, albeit with a more marked peak in the United States, recording 70% year-on-year growth in the most critical phase of the health emergency, compared to +33% recorded at the height of the crisis on the Old Continent.

With specific reference to the Italian market, the experience of forced closures had a major impact on consumption habits, with the new

Growth accelerates in the FMCG segment in Europe despite crisis

Weekly sales in millions of Euro (aggregated data on Germany, UK, France, Italy and Spain)

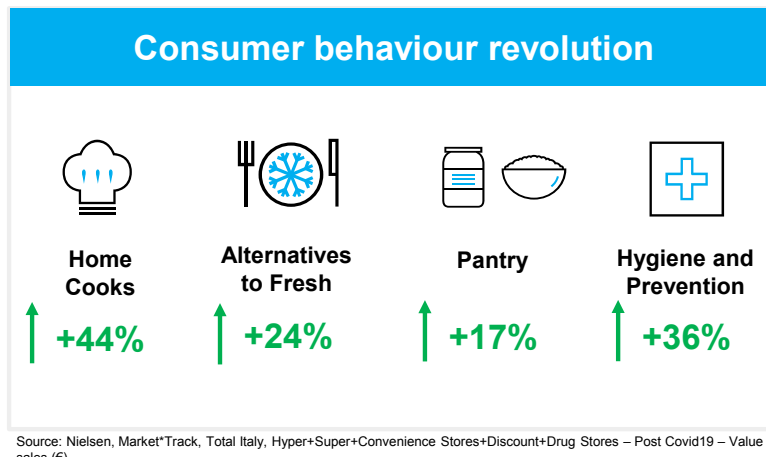
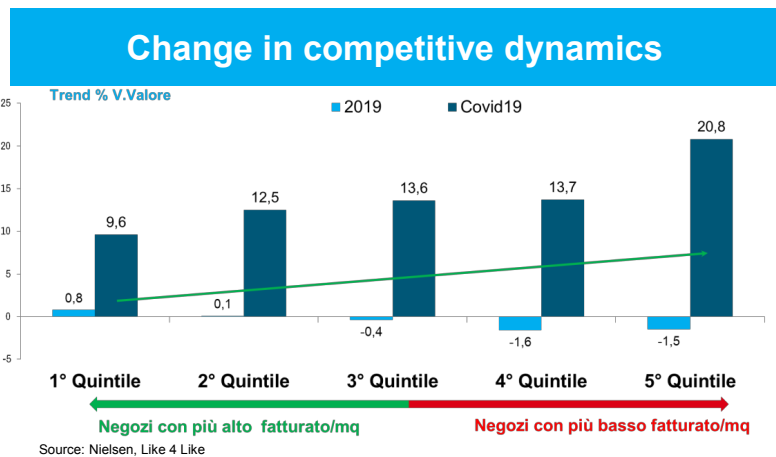
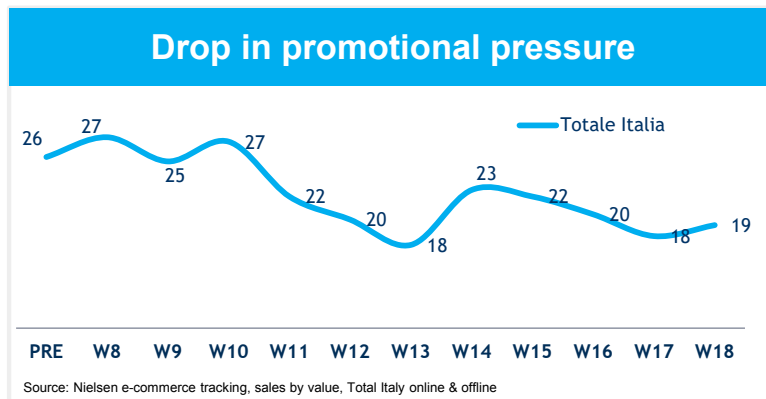
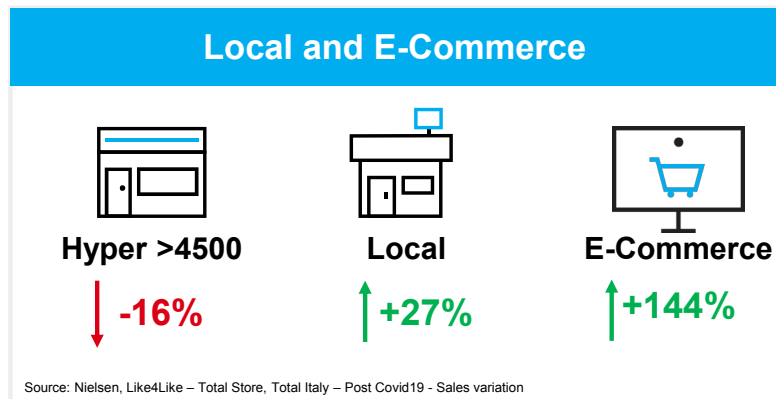


Source: Nielsen RMS Scan Data

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FMCG during Lockdown

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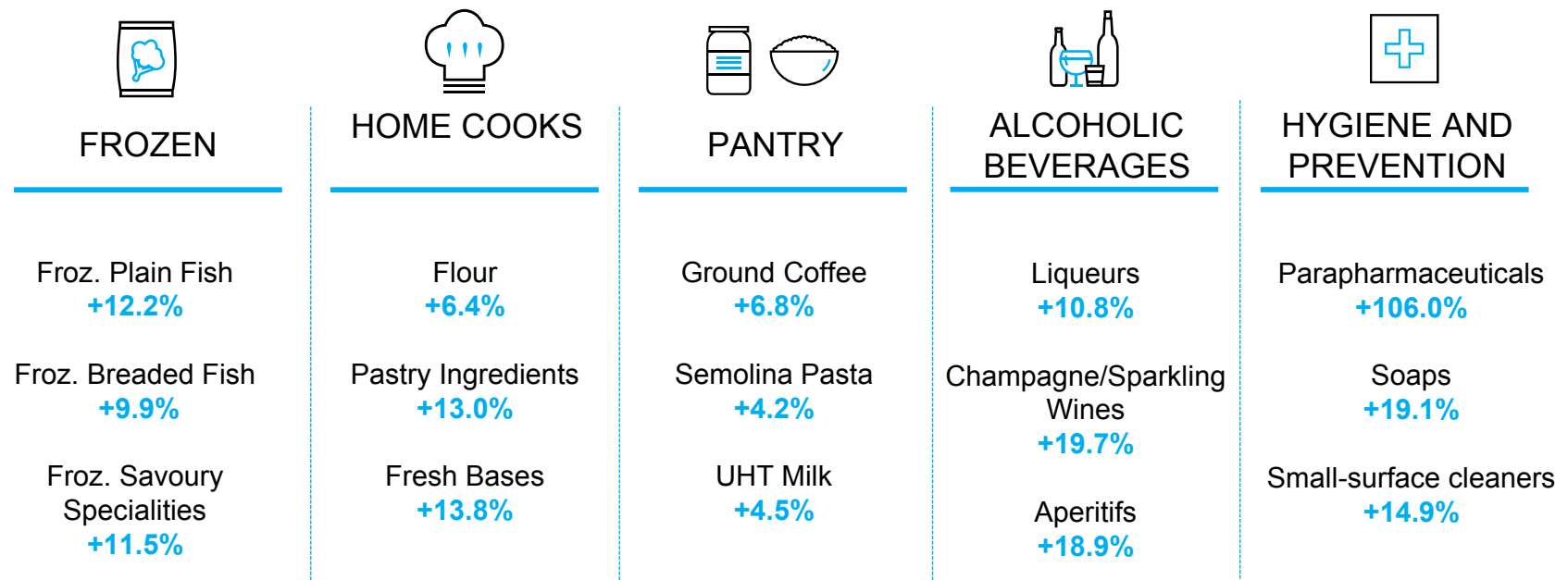
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Baskets that continue to rise

Many trends seen during the COVID period continuing

27 July – 23 August 2020

Sales in value vs previous year



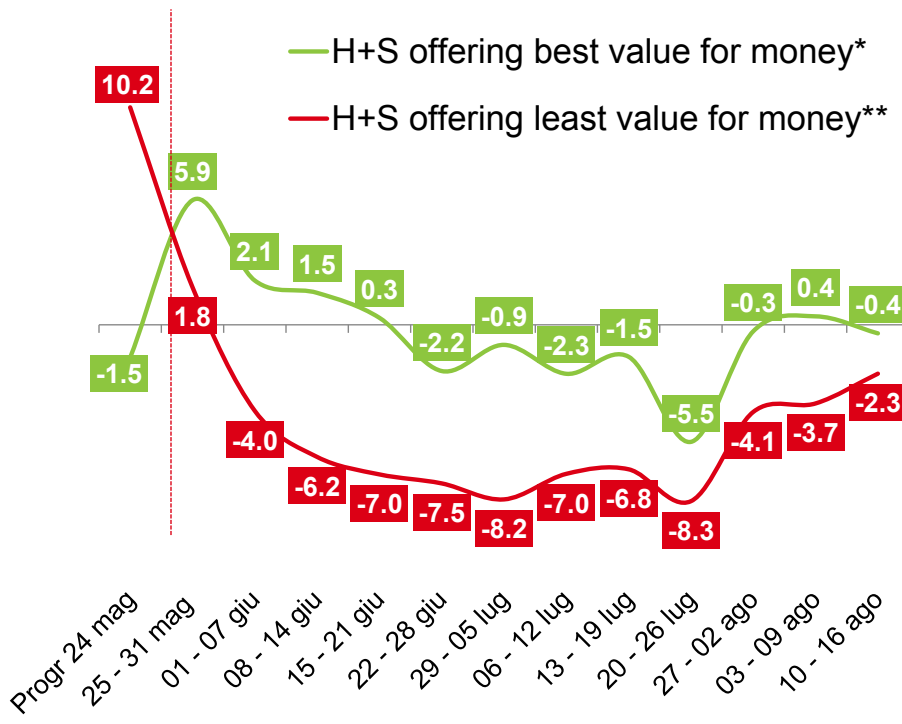
Source: Nielsen Trade*Mis, Total Italy: Hyper+Super+Self-Service+Discount+Specialist Drug stores

behaviours becoming assimilated to some extent into family life. On first analysis, one aspect to consider is the impact of the restrictive measures on the competitive dynamics among the various retail channel formats. Between February and April 2020, across-the-board growth of around 13% in fast-moving consumer goods saw the pace of trends double, a positive development for local stores and strongly negative for large-scale retail outlets. What has come to be referred to as “the new dawn of local retail” has seen 27% growth in turnover for small retail outlets, while restrictions on movement and measures to prevent people gathering in large numbers has had a significant negative affect on hypermarkets,

with sales falling by 16%. This marked change in competitive dynamics (e-commerce actually saw triple-figure growth of 144%, despite structural limitations) was coupled with another phenomenon, specifically the significant drop in promotional pressure, with the “convenience rate” falling from 27% during the pre-COVID phase to 18-19% during lockdown.

Staying at home led to a simultaneous disruption of purchasing behaviours. At a basket level, the “Home Cooks” segment, essentially consisting of raw materials and basic ingredients for home cooking (flour, sugar, butter, eggs, etc.), saw growth of more than 44% in terms of value, alongside

Value for money once again a factor

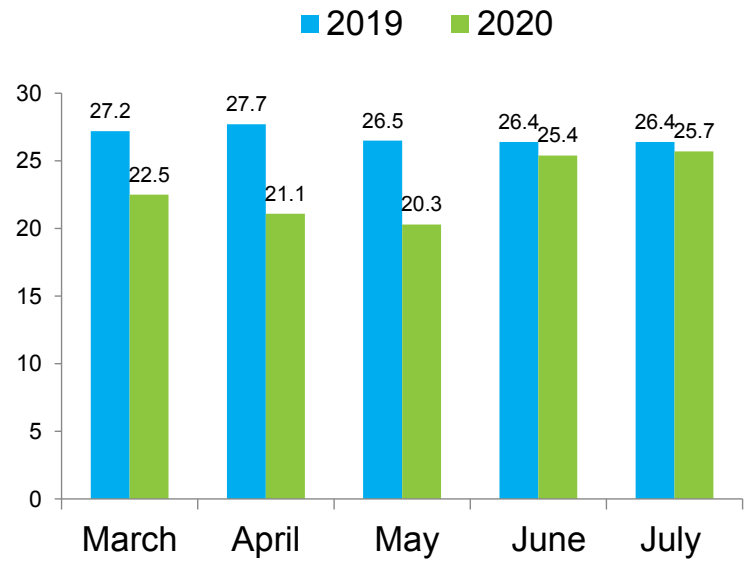


*20% of the H+S offering best value for money in each province

**20% of the H+S offering least value for money in each province

Source: Nielsen Like4Like – Trend based on networks being equal vs 2019 - Total Store – Hyper + Super

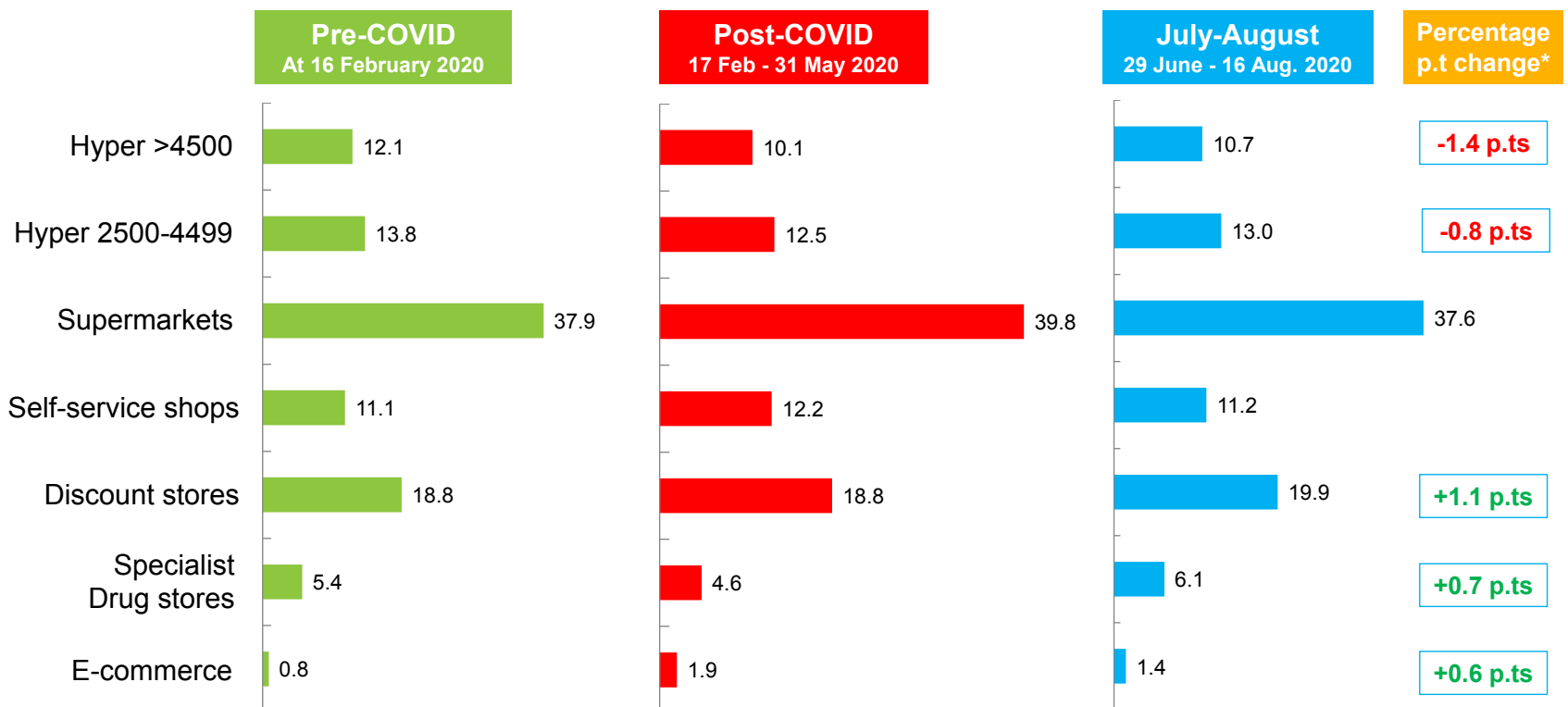
Intensity of Promotional Activity – Total Italy



Source: Nielsen Trade*Mis

Specialist channels are the winners

Large-scale retail suffering



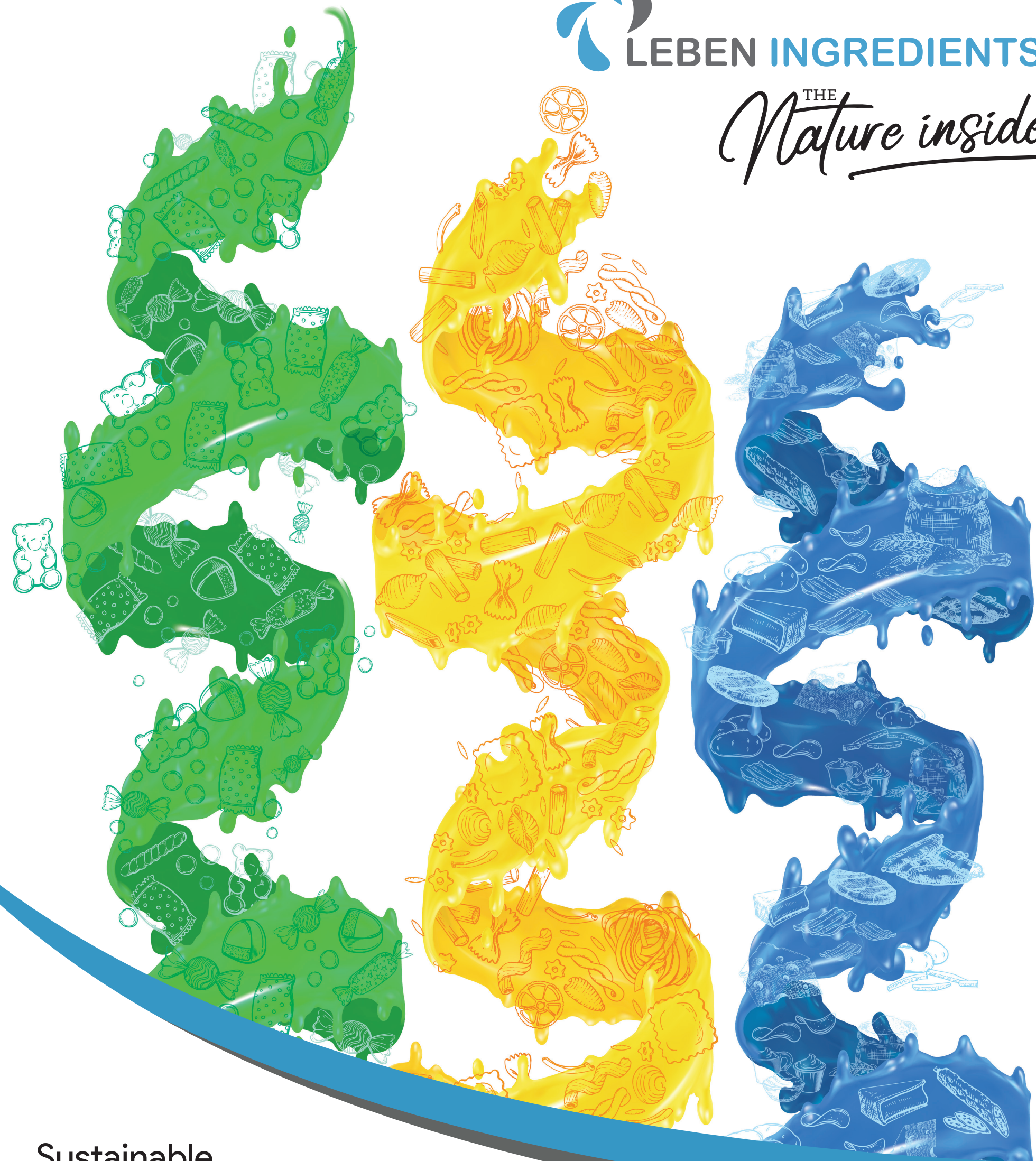
Source: Nielsen Trade*MIS - Grocery

*vs pre-COVID



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equally significant growth in “Alternatives to Fresh”, largely consisting of frozen foods. In the “Pantry” segment – in which dried pasta, rice and cereal are key products and that saw a strong boost during lockdown – Nielsen noted a 17% increase in sales, once again driven by the panic buying in the height of the crisis last spring.

The progressive reopening associated with the so-called “phase 2” saw no change in the trajectories of the fast-moving consumer goods segment overall, with trends remaining positive. Excluding variable-weight fresh items, which are not included in the FMCG trolley, year-to-date figures as at 13 September 2020

(cumulative value since the beginning of 2020) pointed toward 6.9% year-on-year growth, with a 4.6% rise observed in the trend for the last four weeks, culminating in a jump in total takings to €3.4 billion. Albeit at a slower pace, the positive dynamics extended to all the highest-performing baskets of the lockdown period. This was coupled with a simultaneous renewal of interest in getting a good deal (indicative of a gradual return to normal), which has revived competition among stores. Aside from promotions, the lifting of restrictions and renewed freedom to move around boosted sales in specialist and discount

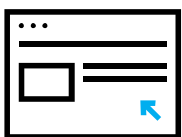
The potential of e-Commerce

Latent demand and barriers to the growth of the channel

**3-DIGIT
GROWTH**

+149%

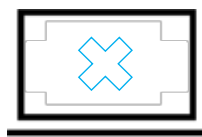
Growth to Post-COVID Value



**UNMET
DEMAND**

18%

did not buy online due to lack of delivery slots

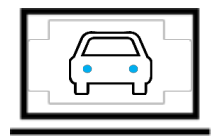
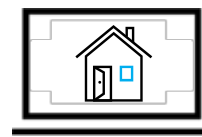


**DEMAND
NOT SERVED**

48% - 5%

Italian area codes eligible for home delivery service

Stores with drive, click&collect and locker service



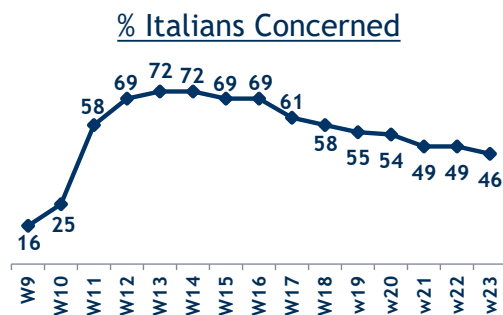
n

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Source: Nielsen, eShopper Trends + Nielsen e-commerce Guide

Customers less well-off, including in terms of certainty n

► Money-saving, but reassurance also required



Time to recovery Country readiness

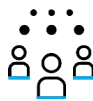


61%

More than 6 months

72%

Italy ready for phase 2



Personal impacts



45%

Work

47%

Income



Money-saving



Reassurance

Source: Nielsen Covid Survey

stores, but had less of an impact on the turnover of hypermarkets. Online stores continued to enjoy triple-digit growth rates, though these did not fully represent the potential for growth, as almost 20% of e-commerce demand went unmet due to a shortage of delivery slots and because, in Italy, only 50% of addresses are eligible for home delivery. The structural setbacks were further confirmed by the low rate of click&collect options, offered by just 5% of retail outlets. In light of these figures and trends and, above all, given the prospect of a deep recession, it is likely that polarisation of consumption will become even more pronounced. “History teaches us” Beretta

explains “that crises do not take all equal toll across the population.” During the Great Recession, 4.6 million Italian households (made up primarily of those with children under 14 and middle earners) reduced their food spending, by a total of €2.8 billion, though this amount was offset almost entirely (2.4 billion) by a simultaneous increase in spending by 3.9 million households: mostly older, child-free, two-person households in the high or mid-to-high earner categories. The true loss in this polarized scenario was in the mainstream segment, made up of the mid-section of the market, according to Nielsen classification.



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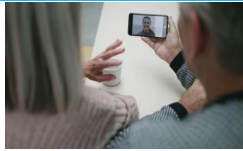
New digital normal



► Omnichannel approach essential to creating value

Less barriers even among older target groups

9.9 million



Zoom Users in March
+1067% vs February

13%



Of people aged 65+ intend to start buying online

Digital channel the primary interface between demand and supply

16.8 million (+36%)

Audience Retail sites in March

9.8 million (+19%)

Audience Online Newspapers in March

Technology for value-added service solutions



Not just Convenience, but also Security

20%



Of Shoppers regard e-commerce as a factor in choosing a brand

Source: Nielsen Panel Survey; Processed by Audiweb Powered by Nielsen

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FIRST COURSE SEGMENT ON THE RISE



Semolina performs well following years of declining consumption

Total First Course

842
KTons

+6%
+7.6% (val.)

Dry Semolina

489
KTons

+6.2%
+11.2% (val.)

First courses without Dry Semolina

352
KTons

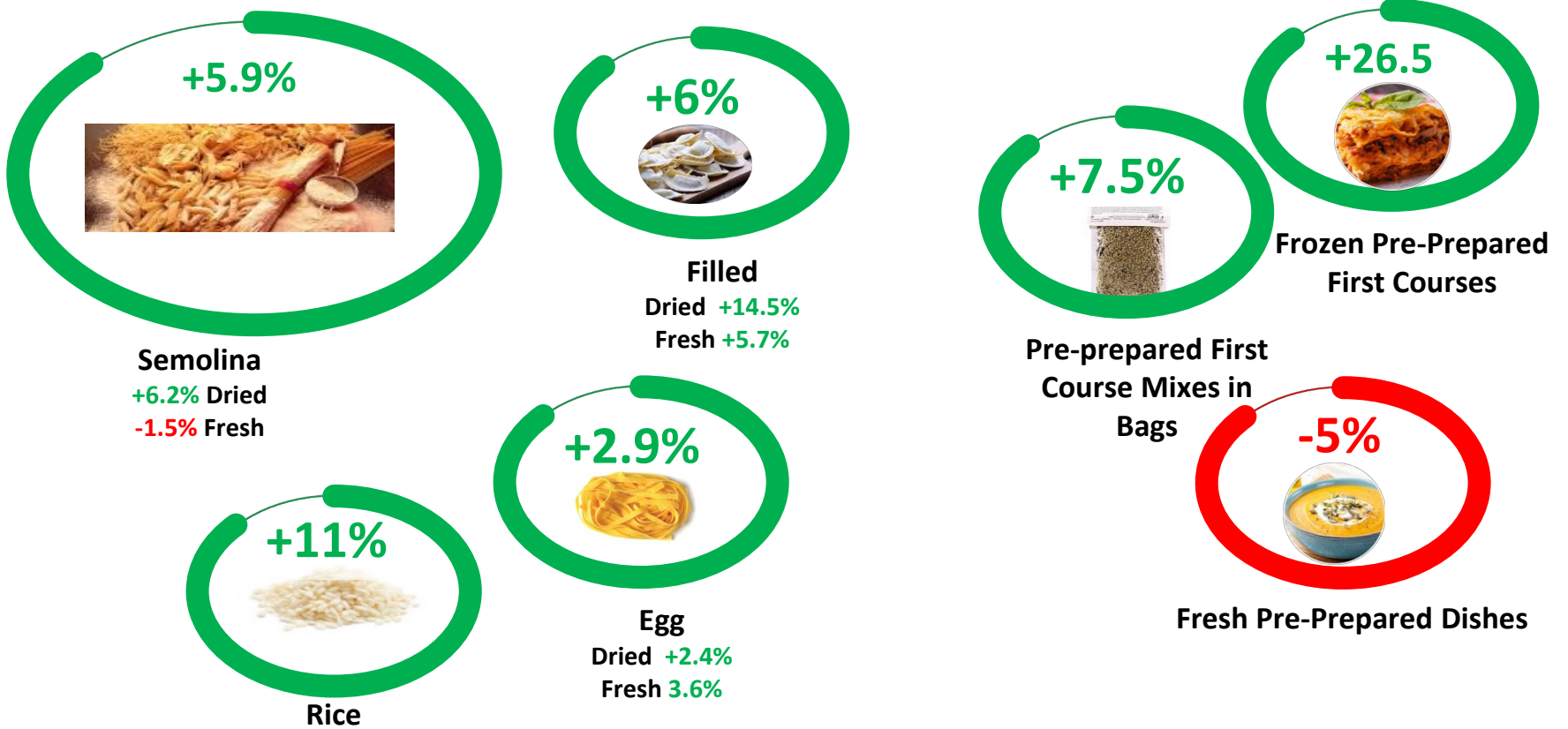
+5.8%
+5.8% (val.)



Source: Nielsen Market Track – Total Italy – Volume and volume trends – Total Italy – Ytd 09/08/2020

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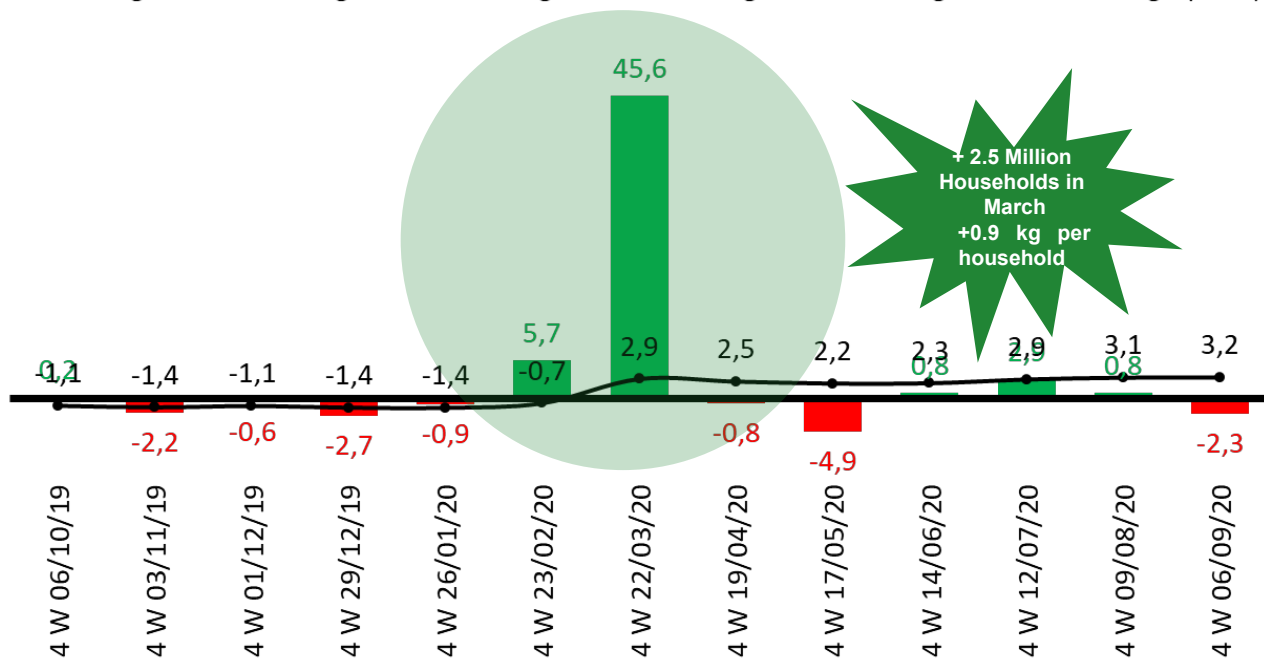
FIRST COURSE IN 2020: RETURN TO TRADITIONAL DISHES DURING THE EMERGENCY. PRE-PREPARED CERTAINLY, BUT LONG SHELF-LIFE ALSO A FACTOR



Source: Nielsen Market Track – Total Italy – Weights and volume trends across Tot. First Course – Ytd 09/08/2020 vs prev.

FEBRUARY AND MARCH HAVE SEEN SEMOLINA GROW AT AN UNPRECEDENTED PACE – MANUFACTURERS WORKING HARD TO GUARANTEE SUPPLY

■ % Chg. Vol. vs. Year Ago >=0 ■ % Chg. Vol. vs. Year Ago <0 — % Chg. VOL. vs. Year Ago (MAT)



SEMOLINA - IT Food - 13 Latest 4 weeks (52 weeks rolling) - Week Ending 06/09/20



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SMOKED +
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SALTED

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SMOKED



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GROWTH IN STANDARD SEMOLINA, PARTICULARLY IN THE MAINSTREAM. SAME GROWTH RATES AS LAST YEAR FOR PREMIUM AND HEALTHY



**Standard
Mainstream**
+3.4% (-6.3%)

67
(vs. 69 LY)



Standard Premium
+16.3% (+16.5%)

26
(vs. 24 LY)



Healthy including GF +0.5% (+0.8%)

7

Source: Nielsen Market Track – Total Italy – Volume trend - Ytd 09/08/2020 vs 19 – (trend vs Ytd 2018)

“The challenge in a situation like the last recession is to identify the keys to creating value, for customers who are less well off, including in terms of certainty” Beretta added “and in a context where making savings and getting reassurance are individuals’ two greatest needs.”

The Italian origin of products represents a point of value across the board, for all age groups, combined with a focus on the domestic world and smart working, the core elements of the new circumstances and consumption methods. Another aspect to consider is the omnichannel approach, with the digital channel – the importance of which has been strongly accelerated by COVID – at the forefront of the interface

between demand and supply, benefiting from less barriers even with regard to the older target groups.

Moving on to pastas, given the need to stock up and the reduced frequency of shopping trips to limit opportunities for the virus to spread, 2020 saw a strong increase in sales, particularly in the traditional dry semolina segment, which had been showing signs of stagnation for some time. The return to the origins is characterised by a very positive performance for the “first course” category overall, with year-to-date growth as at 13 September of 6% in terms of physical sales and 7.6% in terms of value at a basket level. For dry semolina products, which recorded the best

GROWTH IN TURNOVER WITH THE EXCEPTION OF THE HEALTHY SEGMENT



Standard Mainstream

+7.6% (-5.3%)

53
(vs. 55 LY)



Standard Premium

+21.3% (+14.5%)

34
(vs. 31 LY)



Healthy including GF +2.8% (+3.8%)

13
(vs. 14 LY)

Source: Nielsen Market Track – Total Italy – Value trend - Ytd 09/08/2020 vs 19 – (trend vs Ytd 2018)

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OTHER GRAINS SUFFERING, WHOLE WHEAT HOLDING ITS OWN BUT WITH GROWTH RATES FAR BELOW MARKET AVERAGE. LEGUMES SLOWING



Healthy including GF +0.5% (+0.8%)

7



Whole wheat:
0.5% (-1%)

5



Other Grains:
-7.5% (+6.5%)

0.8



GF NO LEGUMES:
+7.4% (-0.6%)

1.1



GF LEGUMES:
+7.9% (+71.3%)

0.1

Source: Nielsen Market Track – Total Italy – Volume trend - Ytd 11/08/2020 vs 19 – (trend vs Ytd 2018)

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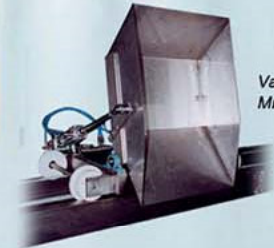
Impastatrice continua
Continuous mixer



Premixer



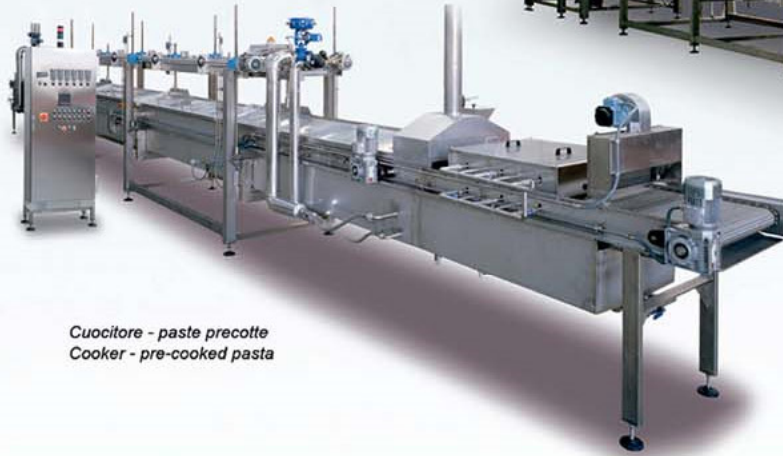
Taglierina automatica
Automatic cutting machine



Vagonetto trasporto impasto
Mixing transport shuttle



Pastorizzatore pre-essiccatore
Pasteurizer pre-dryer



Cuocitore - pasta precotte
Cooker - pre-cooked pasta



Cuocitore per piatti pronti
Cooker for convenience food



Pastorizzatore - Pasteurizer



Cuocitore a cilindro
Drum cooker

TECHNOLOGY PERFORMANCE RELIABILITY

OVERVIEW OF THE IMAGE OF SEMOLINA PASTA: LOTS OF LIKES BUT ALSO SIGNS OF WEAKNESS

n



- Liked by all
- Part of our tradition
- Wholesome
- Can be eaten as a complete dish

CAUSES WEIGHT GAIN	41%	51%
NOT EASY TO COOK	16%	24%
DIFFICULT TO DIGEST	14%	20%
LONG COOKING TIMES	12%	18%

Source: Nielsen Panel Consumer Survey

performance (the “first course” category also includes shelf-stable, fresh, ready-made and frozen products) and that accounts for just under 60% in terms of volume, the year-on-year dynamics are more accelerated, with the category up 6.2% in terms of quantity and up 11.2% in terms of value.

A detailed analysis confirms the success of dry items, with white semolina significantly outperforming whole wheat, while growth was also recorded in the filled pasta category (+14.5%), which had not seen an increase for approximately a decade. This trend is reversed for fresh pastas, which are down 1.5%, but progress can be seen in

that category for filled and egg pasta, with volumes up 5.7% and 3.6% respectively. COVID aside, warning signs remain for the image of dry pasta overall, and it is important to continue to work on this area now and in the future, if this category is to perform well. Positive points include its traditional qualities and wholesomeness, but long cooking times and consumer focus on maintaining their figures are among potential future barriers.

One of the key takeaways emphasised by Nielsen is the unforeseen return of pasta to its original central role on Italian tables. White semolina benefited in both the mainstream and premium categories, which continue to grow. Conversely, the health

TO SUMMARISE

n



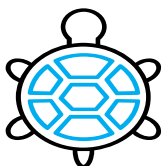
Economic crisis, but also consumption polarisation



New Digital Normal



Central role of the Domestic World



Processing Trauma

The **disruption to the habits** of a large portion of the world's population caused by COVID-19 will offer **an unprecedented opportunity** to those capable of interpreting the changes under way

Italian Food has the key assets

- Satisfaction
- Quality
- Wholesomeness

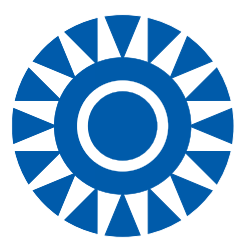
to enable it to play a major role in terms of **added value** in relation to the **new dietary habits** emerging on a global scale

emergency has had a negative impact on the development of products more targeted at the wellness segment that, in pre-COVID times, were at least in part driven by changes in society and dietary habits. Going forward, the disruption caused by the pandemic to the habits of a large portion of the world's population will offer unprecedented opportunities for those capable of interpreting the changes under way and understanding how to make the most of them.

“The first course, an icon of Italian food, has everything going for it – satisfaction, quality and wholesomeness – to enable it to play a key role in terms of added value as regards the new dietary habits on a global

scale, and so including with reference to exports” Beretta concludes.

With regard to the latter sphere, as with domestic consumption, all of the figures are positive, with the first seven months of 2020 – which according to Istat data saw foreign sales reaching 1.5 million tonnes – up 23% on the previous year. Growth was equally strong in terms of turnover, with overseas sales figures for the period up to the end of July jumping to €1.8 billion.



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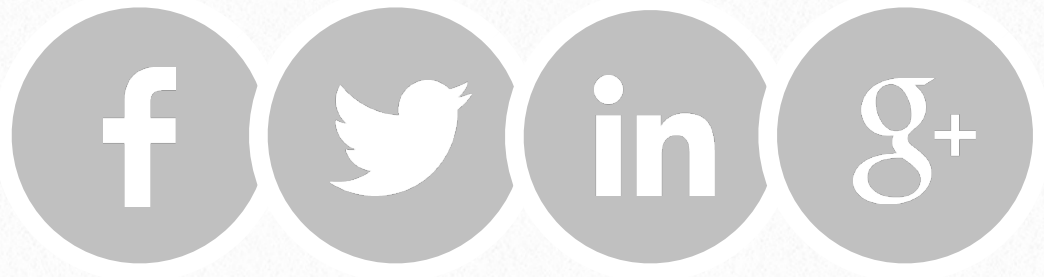
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Piemonte Nord

5



Exports from Brazil: in 2020, biscuits, pasta and industrial bread and bakery products saw turnover of 196.3 million dollars

ABIMAPI
Press release



The overall volume of foreign sales for these categories reached 158,000 tonnes.

In 2020, the sectors represented by ABIMAPI, the Brazilian Manufacturers Association of Biscuit, Pasta and Industrialized Bread & Cakes, achieved exports of 196.3 million dollars. Overall growth of 15% was recorded in terms of value compared to the year-end figures for 2019 (171 million dollars). There was a significant increase in terms of volume (52%), with 158,000 tonnes of products exported.

“In 2020, the crisis generated strong demand for products that are food staples, such as flours, mixes, pasta, instant pasta and pullman loaf, as well as frozen foods. In particular, turnover from exports of pullman loaf – sold primarily to other South American countries – tripled in 2020”, explained Claudio Zanão, executive president of ABIMAPI.

The Association is confident that the growth in these categories can be maintained in 2021 and is planning for an average increase of at least 10% compared to 2020, taking into account the continuation of the pandemic and the consequent financial crisis caused by COVID-19. “We will be paying particular attention to China, one of the key foreign markets for our sector. We must keep pace with the 8.2% growth in Chinese GDP forecast for 2021, laying the foundations for substantial growth in Brazilian exports to this country in 2021”, Zanão concludes. The value of Brazilian exports to China leapt by 120% last year compared to 2019; the country climbed 13 places to become one of the top thirty main destinations for exports in the sector, and second on the Asian continent after Japan.

Details of the results, complete with statistical analyses of the sector for 2020, were presented publicly on 9 February via the Zoom platform.

Industrialized Bread & Cakes

Exports in these categories saw overall turnover of 77.8 million dollars, with revenue up 34% on 2019; this compares to 71,000 tonnes of products sold, an increase of 83%.

“These categories are expanding in the market thanks to their convenience and longer shelf life. This is particularly true of bread and baking mixes, something that is also driven by pandemic isolation and the



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increase in the number of meals eaten at home. Other factors contributing to the positive performance of pullman loaf and toasted bread are the quality of ingredients and packaging, and the affordable price”, notes Claudio Zanão.

Pasta

This category takes the crown, with sales of 24.3 million dollars equating to an impressive increase of 159% in terms of turnover, while volume was up 247% on the same period in 2019, at 29,000 tonnes.

“Pasta was one of the most consumed foods during the pandemic. Its growing popularity among various cultures across the world can be attributed not only to its superb versatility, but also to its price, which is affordable for the vast majority of household budgets”, states Zanão.

In 2020, Brazil boosted its exports of durum wheat pasta. Taking into account only the main target countries for the category – i.e. El Salvador, Chile, Venezuela and the United States – sales reached 15.7 million dollars and 22,700 tonnes over the last year.

Biscuits

This category saw a total of 94 million dollars in turnover and 57,000 tonnes of products exported; volume remained

stable compared to the same period in 2019.

“A lack of confidence in the economy precluded large investments or long-term purchases, leading to the rationalisation of consumption in the category”, explains Zanão.

Despite this context, it remained the dominant category within the sector represented by ABIMAPI, accounting for 43.5% of total exports. 2020 saw exponential growth in Brazilian exports of biscuits to major South American markets such as Bolivia, Chile, Colombia and Peru, as well as to countries in the Middle East such as Yemen and Oman.

Successful initiatives

These results were achieved thanks to the work carried out as part of the Brazilian Biscuits, Pasta and Industrialized Breads & Cakes sector project, led by ABIMAPI in partnership with Apex-Brasil (the Brazilian Trade and Investment Promotion Agency) aimed at identifying opportunities to bring businesses in the segment closer to foreign clients and potential partners.

Due to the pandemic, practically all initiatives undertaken in 2020 moved from the physical to the virtual environment. The sole exception was the ISM fair in Cologne in February 2020, which generated



Abimapi

Brazilian Manufacturers Association of Biscuits,
Pasta and Industrialized Breads & Cakes

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32 billion in sales per year



3.4 million tons of products



75 % of national consumption



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contracts to the value of more than 8.5 million dollars.

Various webinars were held between March and December to discuss key topics with various objectives: allowing online business meetings, presenting data on potential markets, providing updates on the impact of the pandemic on international trade, providing information to various operators and service suppliers to facilitate international business dealings, for example providing inspiration for businesses in the form of sector case studies highlighting recent experiences of first forays into the export market. Over 20 virtual meetings were held in total, and the discussions that took place are available on the Association YouTube Channel.

Another important project was run in partnership with the Junior Enterprises from the ESPM/SP (Global Jr) and PUC/SP (Prisma Junior) International Relations courses, aimed at exports of frozen and own-brand products to Latin America.

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* reserved for pasta producers

The sector project involved over 10 virtual interviews being held, including a discussion with the Brazilian embassies in Bogotá (Colombia), Lima (Peru), Montevideo (Uruguay), Buenos Aires (Argentina), Panama City (Panama) and Mexico City (Mexico) on the reality, dynamism and opportunities presented by those markets, identified as priority targets for business development in the frozen and own-brand categories.

But that is not all: 2020 saw a strengthening of all partnerships following the unpublished study carried out by ABIMAPI with the support of the Brazilian embassy in Washington and the Consulate-General of Brazil in New York, as well as the secretary of Apex-Brasil in Miami. These partners were also involved in arranging online business meetings with potential North American buyers, titled Online Business Talks, an initiative that was also replicated in other countries such as Argentina, Bolivia, Chile, China, Colombia, USA, UAE, Nigeria, Peru, Portugal and Uruguay.

Alongside the initiatives already mentioned, six online Round Tables were also held for businesses, featuring more than 120 buyers from 15 countries and with deals being done to the value of approximately 8 million dollars. The 25 Brazilian businesses involved participated

in various training programmes, including with foreign attendees. The online meetings enhanced connections between the sector and the outside world, across various time zones: companies travelled the world from their PCs and mobile phones.

Also worth noting is the progress made by the sector in terms of international digital marketing. A LinkedIn page was created in June 2020 exclusively for the purposes of interacting with potential foreign clients.

Over the course of 6 months, and entirely organically, the page attracted over 1300 followers from countries such as China, the United States and Portugal. To follow ABIMAPI on LinkedIn:

www.linkedin.com/company/abimapi-international



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6

Short news



Editorial staff



Barilla conquers North America and creates a music playlist

Having recently taken over the premium British brand Pasta Evangelist, the Barilla Group announced it had closed a deal on 29 January to acquire Catelli Dry Pasta, a long-established Canadian brand. The agreement covers the Catelli, Lancia and Splendor brands, and the factory in Montreal, Quebec. “At Barilla, we are driving the transformation of the industry. As world leaders in the sector, our mission is to be architects of this growth” Claudio Colzani, Barilla Group CEO explains “and Catelli Dry Pasta is a natural choice for our expansion”. “We are excited to expand our business in North America”, commented Jean-Pierre Comte, chairman of Barilla Americas.

In collaboration with Spotify, the group also launched Barilla Playlist Timer – 8 collections of music tracks designed to coincide with the cooking times of certain shapes of pasta. The playlists are between 9 and 11 minutes long and include Italian and international songs from various genres. The playlist covers have been designed by world renowned artists: Emiliano Ponzi, Van Orton, Alessandro Baronciani, Mauro Gatti, Carol Rollo, Nicola “Nico189” Laurora, Fernando Cobelo and Andrea Mongia.

Pastificio Rana sponsors racing driver Matteo Cressoni

2021 sees GT racing driver Matteo Cressoni, Italian Gran Turismo Sprint Champion for 2020, teaming up with the Giovanni Rana brand. The Veneto company, a world leader in fresh pasta, fresh ready meals and sauces, will support the Mantuan driver as his official partner at racetracks across the world. Matteo Cressoni embarked on his new adventure by participating for the third time in the legendary Rolex 24 At Daytona on 30 January, together with teammates Simon Mann, Nicklas Nielsen and Daniel Serra, in a Ferrari 488 GT3 Evo bearing number 21. The collaboration is based on a shared set of core values including commitment, teamwork and great passion. The driver, born in 1984 and winner of the Italian Formula Three Championship in 2004, commented: “I’m even happier that this collaboration is born from the genuine personal relationship and friendship I’ve enjoyed for a number of years with the Rana family, who I would like to thank for this opportunity. I share their spirit and the vision that has led to their success: results are achieved through work and passion, without ever giving up, and above all by working as a team!”.

Felicetti front and centre at the world ski championships

From 8 to 21 February, Cortina hosted the 46th edition of the World Alpine Ski Championships: more than 600 athletes from 70 countries competed on the slopes of Cortina d'Ampezzo. Trento-based Pastificio Felicetti, a long-standing supporter of the world of sport, was front and centre with its team: competing were Manfred Mölgg, winner of three previous World Championship medals and a special slalom World Cup, and the young Nadia Delago, who specialises in downhill, super-G and combined.

As such, the new sustainable Felicetti pasta packs, made from 100% natural

pure cellulose paper, and fully recyclable, featured prominently at the Cortina event, with the new packaging encapsulating the essence of the product: the Dolomite mountains where the pasta is produced, the high-altitude spring providing exceptionally pure water and the 100% Italian durum wheat semolina. Felicetti was also a supplier for the Casa Italia Collection-FISI initiative – a new format born out of a collaboration between Federazione Sport Invernali (Italian Winter Sports Federation), CONI and Sport e Salute Spa – which showcased examples of Italian excellence throughout the World Championships by way of a unique storytelling experience that weaved together art, design and innovation.



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Mancini, packaging with QR code

Since January, the bottom of Mancini pasta packs now features a QR Code, allowing consumers to access information on all stages of the production process, supply chain and distribution of the product instantly and without intermediaries.

Mancini Pastificio Agricolo, based in the province of Fermo, is among the first in Italy to have automated the traceability systems by printing a QR Code on the packaging of each production batch, availing of the Trusty platform that uses blockchain technology designed by Apio, a startup based in The Marches, for the agrifood sector. “I’m confident that consumers will appreciate the transparency of this service, which will also provide an insight into the reality of our day-to-day work” Massimo Mancini, owner of the pasta factory declared.

Agnesi invests in compostable packaging

Colussi has unveiled its new packaging, which can be composted, allowing it to break down over time to become fertiliser. The old packaging will be replaced by a paper pack certified by the Forest Stewardship Council or a mater-bi wrapper developed by a pool of Italian companies in collaboration with the Pollenzo University of

Gastronomic Sciences. The quality of the new line also extends to the product: Agnesi leads the way with the first pasta produced with wheat from a 100% Italian supply chain, guaranteeing traceability, provenance and ethical production. “We continue to invest in the environment and in Italy” explains Angelo Colussi “staying ahead of Europe’s requests in relation to the Green Deal and being the first on an international level to adopt plastic-free packaging”.

Sgambaro adopts trees

Having invested in renewable energy sources to power its plants, the Treviso-based pasta factory Sgambaro has signed up to the EU-funded Wow Nature project, which aims to replenish woodlands in the area. The pasta factory was involved in creating 2.5 hectares of new forest in Carmignano di Brenta, Bosco Limite, which is today home to 2,300 trees from 15 different species. Sgambaro also adopted 600 hectares of woodlands, between the provinces of Vicenza and Belluno, and contributes to the Blue Valley project aimed at protecting the ecosystem of the Venetian Lagoon. According to chairman Pierantonio Sgambaro, it is “a duty to repair the damage done to the climate: as entrepreneurs, we have a responsibility and must lead by example”.

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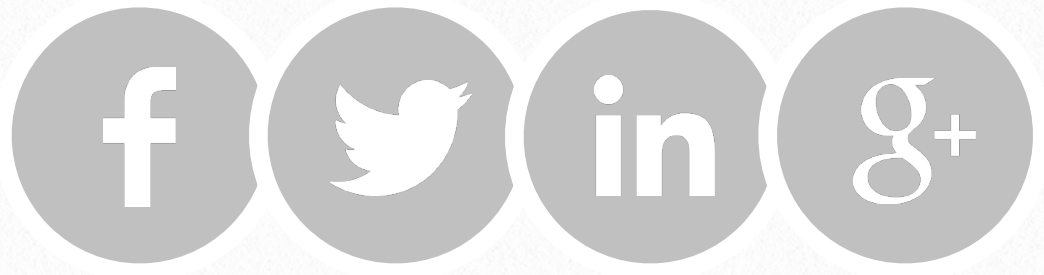
The Kronos project. It originated from a collaboration with Albert Carlton, an American breeder, father of Desert Durum from Arizona, the durum wheat of high quality, imported from the best Italian pasta factories to produce premium pasta. Molino Grassi since 1992 has managed to have the exclusive copyright to reproduce the

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

Per saperne di più: www.molinograssi.it



7



Pasta, sales boom in the US in 2020

Pastaria Centre for Economic Research



Excellent performance by Italian pasta in the US market: + 35% increase in import volume last year.

Italian pasta experienced a “sell-out” in the US in 2020. Expenditure, based on the last twelve months, has risen close to 490 million USD, a leap of 34% compared to 2019. Moreover, there was no inflationary factor behind the maxi increase in expenditure, since in terms of volume, imports of Italian pasta reached the 300,000 tonne mark across the Atlantic, an increase of 35%.

The extraordinary figures published by the US Census Bureau are largely due to the exceptional situation associated with the pandemic emergency.

Pasta, as observed in other areas of the world, was one of the products most facilitated by the restrictive measures against COVID, which re-launched home-made meals, rewarding, at times of greater restraint in social relations, all pantry products and, in general, those most accessible to families in terms of price. A kind of rediscovery, in the four corners of the planet, of the quality and nutritional value of pasta, promoted by its minimal effect on the food budget.

Overall, considering all the various origins, US pasta imports reached a record of 663,000 tonnes last year, an increase of 34%. Monetary value also broke a record, growing at the same rate as the volumes, with expenditure topping 1 billion USD for

the first time, and rising to 1.27 billion USD.

In terms of market share, Italian pasta accounts for 44% of the total amount of US imports, in physical flows, and 39% of the monetary equivalent. The role of South Korean, Canadian and Chinese products is quite significant, albeit to a much lesser degree than those of Italy, the Asian presence being mainly associated with sales of noodles, which official statistics include in the pasta category, like couscous.

In the leading “Made in Italy” segment, represented by traditional dried semolina pasta, in addition to Canada a major role is also played by Mexico and Turkey, with Ankara, in particular, recording a triple-digit increase in the US market in 2020, exporting over 31,000 tonnes with respective proceeds of almost 35 million dollars.

Among the main European competitors, only two countries, France and Germany, have marginal shares of around 1% in value. It should be noted that Italy alone has a higher impact on the US market than the top four followers, a list which, in addition to South Korea, Canada and China, also includes Thailand.

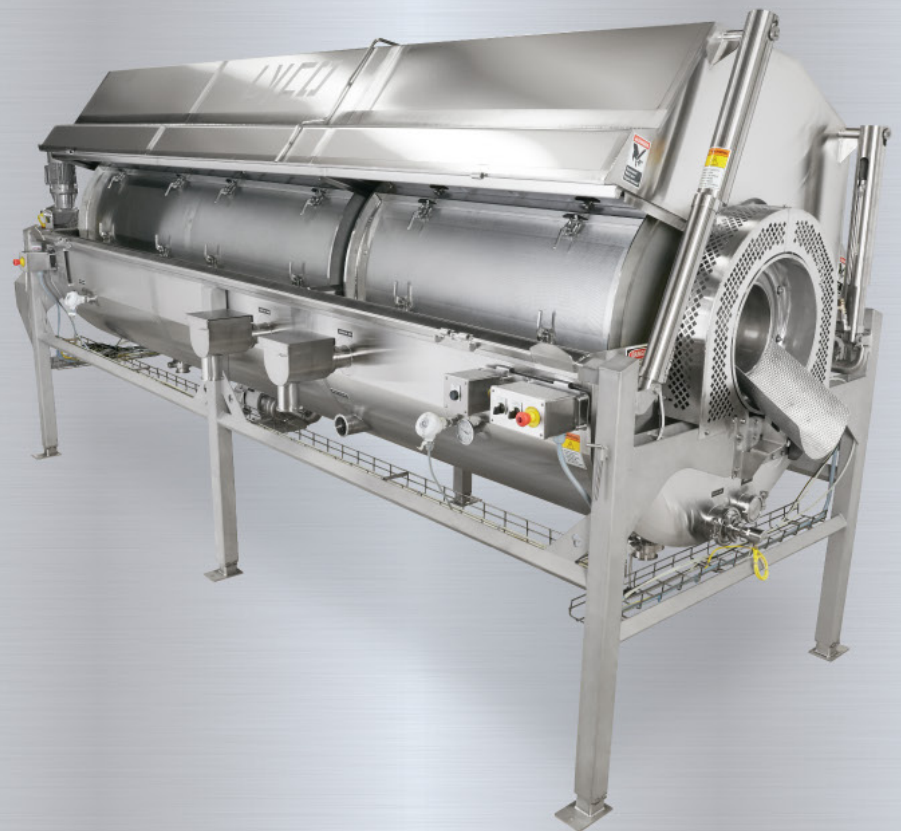
According to the data published by the National Pasta Association, the United States - which also plays an important role

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PASTA COOK TIME / MINUTE	8	9	10	11	12	13	14	15
Pasta Short PPH	2,350	2,100	1,850	1,700	1,500	1,400	1,300	1,200
Pasta Long PPH	1,450	1,300	1,150	1,050	950	900	800	750

SUGGESTED APPLICATIONS



PASTA

RICE

VEGETABLES

DRYBEANS



as a producer - thanks to technology and equipment made in Italy, is the largest pasta market in the world, with retail sales of 2.7 million tonnes per year and an average per capita consumption of almost 9 kilos. In addition to traditional pasta, the market also seems to be rewarding innovative segments, paying increasing attention, first and foremost, to organic, whole grain and gluten free products.

In general, dried pasta, which is characterised by an upward trend in consumption as well as imports, is sold in the USA chiefly on the off-trade market, thanks mainly to the large-scale distribution channel. Sales of fresh pasta, especially filled pasta, are more dependent on the on-trade market, with restaurants taking the lead. This sector has suffered severely over the past year due to the closures imposed in fits and starts in response to the COVID-19 emergency.

Analysing the trend over the last five years (2016-2020),

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NATIONAL PASTA ASSOCIATION

Annual Meeting | October 17-19, 2021

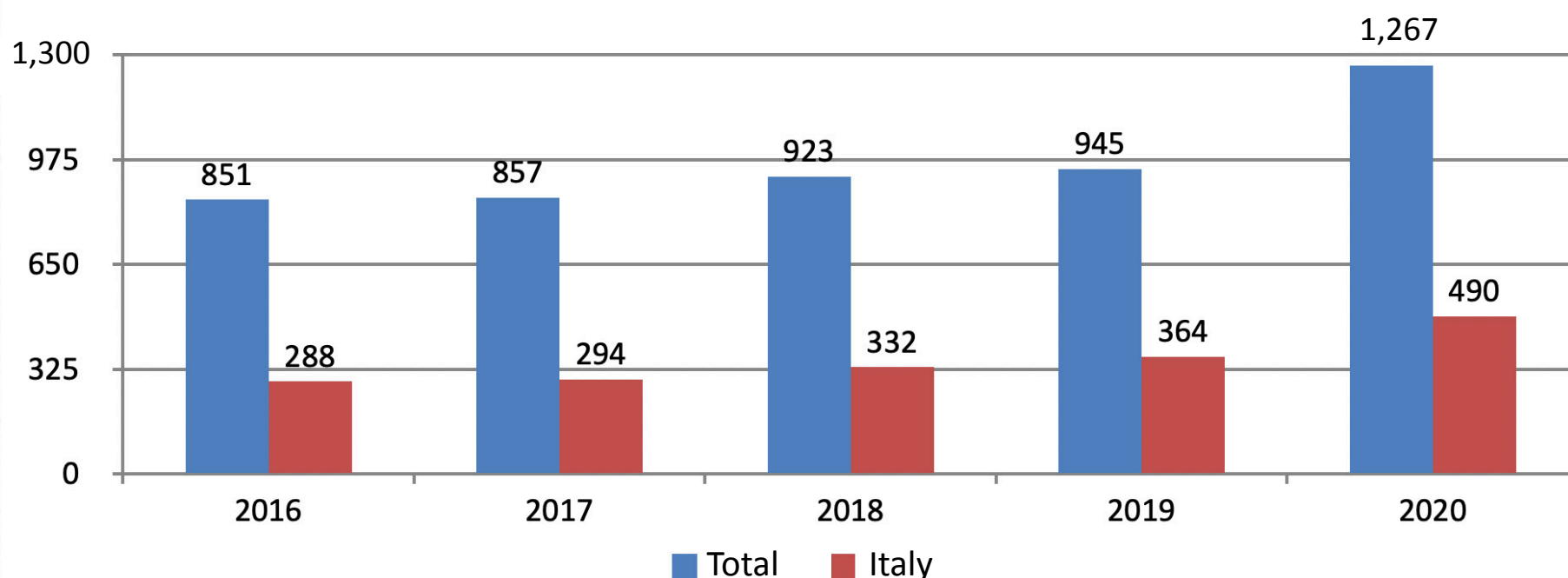
2020 has been a year of change, and our 2020 Annual Meeting was canceled due to the risks that COVID 19 posed on an in person meeting.

As the NPA Member Education Committee began to plan for 2021, the current state of the country, member safety and comfortability had to be taken into consideration. After much deliberation, the NPA Board of Directors has made the decision to postpone the NPA 2021 Annual Meeting from its originally scheduled dates of March 21-23 to **October 17-19, 2021** to allow for an in person event in Florida.

The meeting will be held in the same hotel, the Ponte Vedra Inn & Club in Ponte Vedra Beach, FL, and registration rates from the March 2020 meeting will be rolled over and applied to the new October dates for those who had previously registered.

On a positive note, this allows us to be together during National Pasta Month and celebrate National Pasta Day (October 17) in person! More information about registration will be forthcoming in a few months. We are excited to see you in October!

Table 1 US IMPORTS OF PASTA (MLN USD)



pasta imports to the US have grown at a compound annual growth rate (CAGR) of 7.5% in volume, and of 8.3% in value. For Italian pasta, the same calculation yields higher rates, in both cases (both monetary and quantity) topping 11%.

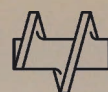
The final effect, and above all the different pace of growth, is even more evident if we analyse the monetary equivalents of 2020 and those of five years ago, a comparison which shows a 70% increase for Italian products and an increase of less than 50% for the totality of US imports for the sector. Forecast analyses of the world pasta market indicate, for the next five-year period (2021-2025) average annual growth of around 3 percentage points. If the US market moves at the same pace, it could be worth around 1.5 billion USD in imports by 2025, while the entire retail market, in real terms, could top 3.1 million tonnes. According to the still provisional ISTAT data, updated to the first eleven months of

2020, the USA, which has overtaken both Germany and France, is now Italy's main market, with a share, in terms of value, of over 15%. In terms of volume, however, it is the third most important destination, preceded by Germany and the UK, accounting for just under 12%.



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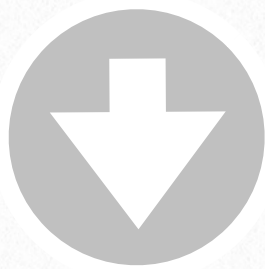


Molino Pasini: a new project in the form of a kit

Molino Pasini
Press release



Introducing an intriguing new addition to the Molino Pasini box line, developed with gourmets in mind: a gnocchi kit, available from the e-shop of the milling company based in Cesole (Mantua).



[Watch the tutorial](#)



This year's Easter offerings from Molino Pasini are truly unique, including the surprise the Cesole Mill has in store for gourmets and food enthusiasts in search of an exclusive experience.

The company has launched a kit with everything required to make the perfect traditional gnocchi dish at home, in a limited-edition box designed by Lissoni Graphx. As well as the Pasini gnocchi mix, the kit contains a cherry tomato sauce developed by chef Luca Marchini that goes perfectly with the dish, and a unique tool designed by Piero Lissoni for making ridges in the gnocchi – a wonderfully practical design object that comes in handy when preparing the recipe.

With its finger always on the pulse of the latest fashion and design trends, which it transposes to the food world, the mill's new project is first and foremost a concept, offering everyone the opportunity to easily prepare a truly iconic family lunch dish at home, for an unrivalled taste experience.

Traditional gnocchi, ready in no time

A sublime dough made from the Pasini mix and water, decorated with ridges using the special tool, then immersed in boiling salted water, drained, and coated in a velvety tomato sauce.

The new Pasini kit contains everything required to recreate the experience of being at your grandmother's lunch table, of a Thursday: the new gnocchi mix, the wonderful tool exclusively designed by Piero Lissoni, and the cherry tomato sauce developed for the Miller by Michelin-Star chef Luca Marchini.

The perfect recipe for a flavour journey back in time

Less experienced chefs who might be unsure about the recipe will not get left behind: Molino has also created multimedia



content to make the kit even easier to use. Simply scan the QR Code to launch a video tutorial with easy instructions for preparing the gnocchi, putting together a complete lunch for four people in no time. The gnocchi box can be purchased from the Molino Pasini e-shop at a price of €24 and will be part of the ongoing collection of boxes available online.

“This project for Molino Pasini brought me back to my childhood – cooking can be a game and also a ritual” architect Piero Lissoni confirmed. “For the gnocchi kit, we took the archetypal form of this tool as our inspiration, approaching it as a child would draw it: nothing more, nothing less.” With quality results guaranteed, in the words of chef Luca Marchini: “Gnocchi al pomodoro is one of the most traditional



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dishes of Italian cuisine, evoking time spent with family and the pleasure of a simple, truly flavourful dish. And these are the exact sensations I wanted to capture in my jar of cherry tomato sauce, sensations that are perfectly complemented by the exquisite mix developed by Molino Pasini to make top quality gnocchi. All of which comes together for a captivating flavour experience.”

A true example of collaboration, to make Easter even more delicious, as emphasised by Gianluca Pasini, company director: “I’m delighted to have had the opportunity to work with such a major player in the international creative world at this very unusual moment in time. Our approach has always involved combining



recipes and design, as highlighted by our slogan: ‘The art of flour’. What’s more, the idea of giving everyone the opportunity to prepare such an iconic recipe with very little effort, providing everything they need in a kit, I think it’s a unique opportunity to rediscover family, the joy of being in the kitchen and working together to prepare something delicious to share.”



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