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The professional information network magazine for pasta manufacturers

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1

Sixth edition of the Pastaria Festival: Parma, 30 September 2022

Editorial staff

The Pastaria Festival returns to its origins - the same venue and same popular format of the pre-Covid years. The event most anticipated by sector operators is due to take place in Parma, on 30 September 2022, and includes some important new aspects.

The 2022 edition of the Pastaria Festival – the free event offering specialized information for pasta producers and supply chain operators – will take place on 30 September in Parma, and will mark the return, following the pandemic, to its original and unique format which contributed to its popularity.
The sixth edition of the Pastaria Festival will therefore be an in-person event bringing together the main players in the international pasta supply chain - producers, associations, universities and research institutes, professional bodies, supplier companies and experts - but not without offering (following the experience of recent years) the option to follow some of the scheduled conferences live on-line, also in English.

A packed program scheduled over several conference rooms and an exhibition space

The Steering Committee of the Pastaria Festival 2022, made up of university professors and experts from different types of important pasta manufacturers and representatives of associations, is currently working to define a comprehensive, detailed, high quality program that is intended to garner the interest of the different professional figures that work inside a pasta factory and for whom Pastaria Festival is expressly designed: owners, quality assurance managers, purchasing managers (technologies and ingredients), research and development managers, communication and marketing managers, sales managers, production managers and logistics managers.
The program of conferences, workshops and presentations will be distributed over several conference rooms in parallel sessions, all with free access. This means that all visitors are at total liberty to choose their own training option, based on their own interests and their position within their company.
Pastaria Festival will also provide visitors with opportunities to make contact, in the exhibition area, with companies supplying machinery, ingredients and services for pasta production.

An event in collaboration with associations and universities

As always, the event will avail itself of the support and collaboration of the most important Italian and international associations of pasta producers, and the contribution of researchers and professors from Italy's most reputable universities. As


green heart

is customary, they will focus on the status of research applied to pasta.

An edition focused on internationality

The sixth edition of the event continues the Festival's process of internationalization, launched in 2019, providing the simultaneous translation in English for the most interesting conferences in the schedule in order to encourage the participation of foreign operators.

The inclusion within the Pastaria Festival – a whole new and prestigious aspect – of the in-person annual assembly of the International Pasta Organisation, chaired by Carl Zuanelli (also Chairman of the US National Pasta Association) will certainly contribute to giving new impetus to the event's process of internationalization and to guaranteeing a qualified presence of foreign producers at the event organized by Pastaria.

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The Steering Committee

IThe Steering Committee of Pastaria Festival consists of a Scientific Committee composed of Cristina Alamprese (University of Milan), Marco Dalla Rosa, (University of Bologna), Daniele Del Rio (School for Advanced Studies on Food and Nutrition) Gabriella Pasini (University of Padua), Fabio Licciardello (University of Modena and Reggio Emilia), Emanuele Marconi (University of Molise), Francesca Scazzina (University of Parma), and an Advisory Committee composed of Federica Calcagno (Fontaneto), Roberto Ciati (Barilla), Federico Marotta, (Rana), Michele Minucciani (MassimoZero), Stefano Zardetto (Gruppo Voltan), Cristiano Laurenza (International Pasta Organisation), Gherardo Bonetto (APPF). The Steering Committee is coordinated by Lorenzo Pini, editor-in-chief of Pastaria.

Sponsors

The event was made possible thanks to

solid support from leading international companies in the supply of machinery and systems, ingredients and services for pasta production, aware of the importance of specialised training and continuous professional development.
The sponsorship programme is available from Pastaria's editorial offices on +39 (0)521 1564934 or by e-mailing info@pastaria.it.

Taking part

Attendance is free, by invitation only, and is reserved for pasta manufacturers until all places are filled. Pasta factories interested in receiving an invitation can register free on the website pastaria.it.
Participation is also open to sponsors of the event and Pastaria advertisers.

Resources

To see what the Pastaria Festival is all about, you can:

- watch the video of the Pastaria Festival 2017;
- download the program of the last pre-Covid edition;
- watch the video of the opening of the Pastaria Festival 2020 (on-line edition only.

2

Energy shock and stagflation: the negative driving forces behind commodity price increases and

Pastaria Centre for Economic Research

Concern regarding raw material prices and high energy costs was the theme of the first Pastaria webinar held this past 13 April, a summary of which is offered in this issue.

This past 13 April, the Pastaria webinar dedicated to the economy and markets was held, entitled: *Energy shock and stagflation: the negative driving forces behind commodity price increases and scenarios for pasta producers*. The event, held on the Zoom platform, was the first in a series of dates this spring dedicated to issues of special interest and major relevance to the pasta sector, with the active involvement of experts in a range of areas.

Organized by the Pastaria Centre for Economic Research, the webinar provided context analysis, also including future perspectives, and a number of observations useful in analysing and understanding current trends. Special emphasis was given to evaluating potential developments for the 2022-23 trade year regarding the upcoming wheat harvest in light of the exceptional circumstances of current events.

In 2021, the Italian economy exhibited a significant ability for recovery, with a leap of 6.6% in GDP, following the 9.1% drop in 2020, which was an annus horribilis due to the Corona virus emergency. It was the largest increase since 1976, although “hyped” in the face of the previous twelve months heavily affected by the lockdown measures that halted activity in a number of sectors.

During 2021, inflation also began to increase once again, accelerating more markedly in the second half of the year. From -2.0% in 2020 (a year of deflation), the cost of living jumped to +1.9% on average over the last twelve months, while during the same period, the index of contractual hourly pay rose by just 0.6%, indicating an implicit reduction in the purchasing power of families.

Worsening relations between Russia and the European Union, with the increase in tensions between Moscow and Kiev, unsettled natural gas prices starting back in May 2021, following a period early in the year without any shocks. A trend which continued to worsen, resulting in a year-end balance of a doubling and tripling of figures across the entire gamut of energy products and the fertilizer market, specifically for nitrogenous fertilizers (urea and biammonium phosphate) used widely in farming, the prices of which travel in strict correlation with those of gas.

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Table 1 **PRICES OF SOME COMMODITIES**

	2022	2021	VARIATION
Natural gas, Europe ($/MMBTU)	3.24	16.12	397.5%
Brent oil ($/barrel)	42.30	70.40	66.4%
Coal, Australia ($/ton)	60.80	138.10	127.1%
Urea, Eastern Europe ($/ton)	229.10	483.20	110.9%
Biammonium phosphate DAP ($/ton)	312.40	601.00	92.4%

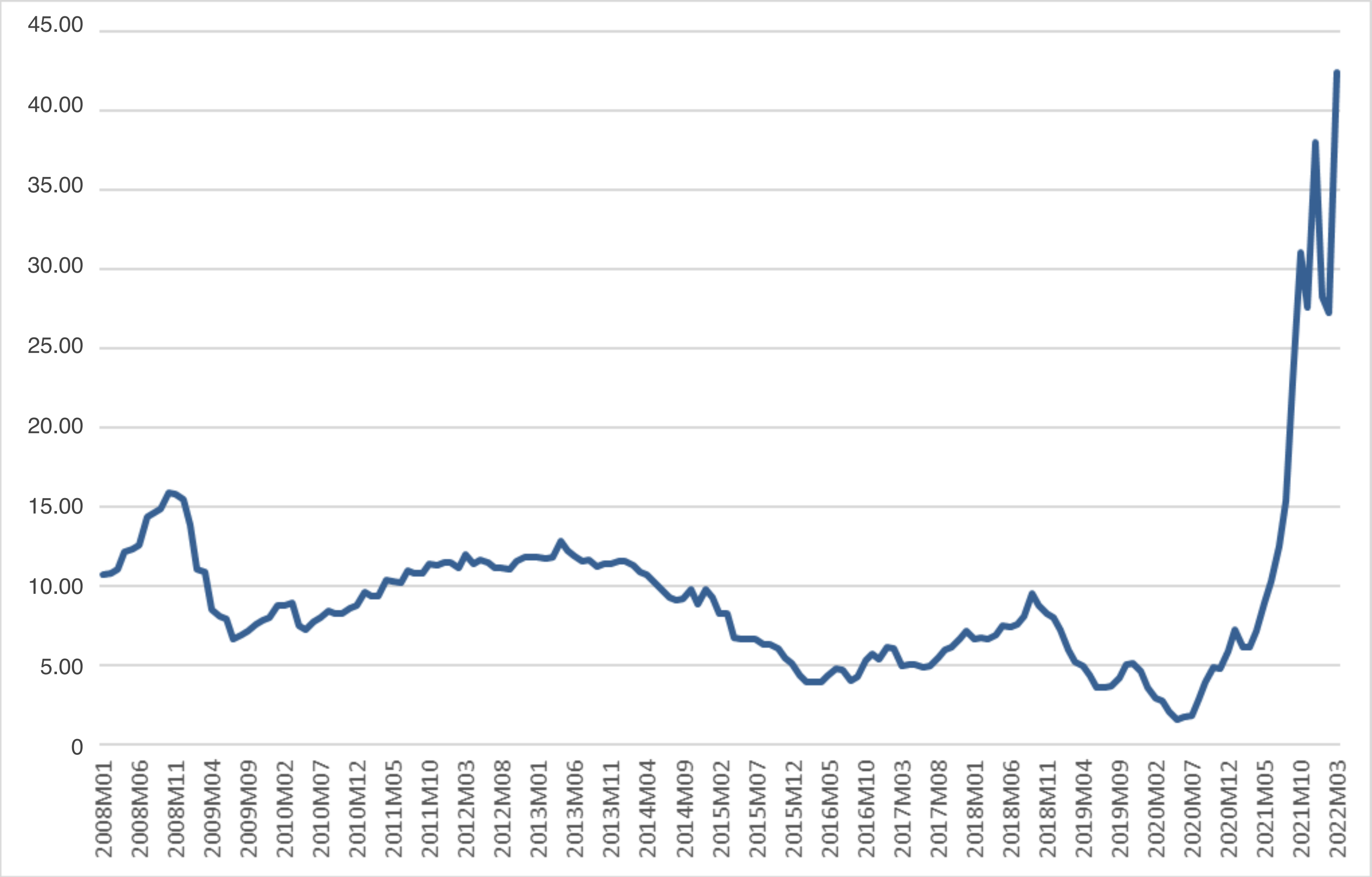
Source: World Bank

Following the hiatus in 2020, the economic recovery and the failure of producer countries (OPEC plus) to adjust supply availability, also pushed up the per barrel price of crude oil which rose on average by nearly 70%.
With the energy shock which triggered a domino effect for all industrial raw materials, companies began to exhibit signs of growing difficulty that were more conspicuous in energy-intensive sectors and those down-stream close to final demand, such as Food & Beverage which, by nature, has lower profit margins.
The rest of the damage was done by the destructuring of global supply chains within the context of the pandemic emergency, the desynchronisation of merchandise flows that drastically reduced container availability at embarkation ports, the triple-digit rise in sea shipping rates, and the increasing risk of protectionist trends due to the growing difficulties in the supply of essential raw materials.
To-date, the impact of fiscal policies to counteract the crisis has been modest, with macroeconomic inputs connected with National Recovery and Resilience Plan (NRRP) worth, in perspective, only a few tenths of a percent in GDP mobilizing, in absolute terms, financial assistance worth € 235.1 billion between 2021 and 2026.
The means chosen by monetary authorities have been ineffective in fighting the rise in inflation – now well over the projected limits – due to the shock in supply, rather than a recovery in demand (consumption and investment). In a worst-case scenario, the rise in interest rates which the Federal Reserve (the US central bank) has already announced, will result in new pressure on banks and corporate defaults, starting with emerging

countries. In addition, with “tapering” (abandonment of highly-expansive monetary policies and resulting gradual withdrawal of central banks from purchasing government securities and corporate bonds) we can expect a scenario with an increase in the spread between Italian and German government securities, with 10-year BTP rates that have already surpassed the 3% threshold. With the outbreak of the conflict in Ukraine, the global macroeconomic picture has further worsened, within a context already aggravated by the continued pandemic and spread of new variants of the virus which has led to lockdowns in a number of Asian countries. A mix of factors that has imposed a new push towards a rise in raw material prices, especially energy and food, rendered global supply chains even more fragile, and created trade barriers as a result of the sanctions and counter-sanctions and protectionist trends that have been justified by the need for food security, with the initial (de facto) prohibitions on the export of cereals from Hungary and Serbia.

The macroeconomic forecasts for this year indicate an inflation rate of 5% in Italy and a slowing in economic growth to just a bit above 2%, with the risk of an abrupt

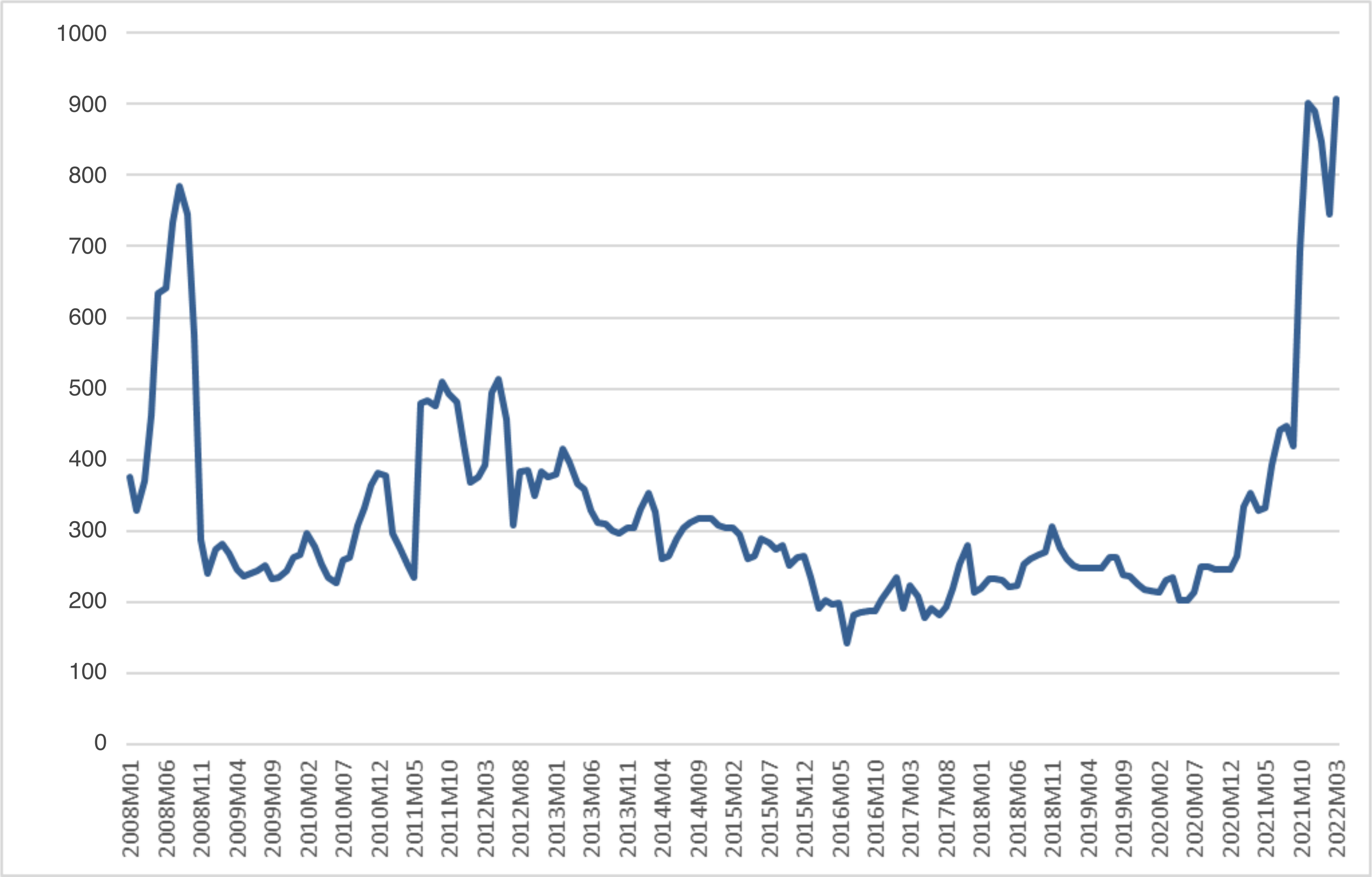
Chart 1 **PRICE OF NATURAL GAS IN EUROPE $/MMBTU***



** British Thermal Unit 1=2,93 Megawatt-hour*
Source: World Bank

deceleration in industrial production. All this within a context of more volatile currency markets (there has been a significant revaluation of the dollar exchange rate with the euro and a major devaluation in the Japanese yen compared with other currencies) and spreading uncertainty in financial markets.
The consequences resulting from the shock of the war in Ukraine have pushed natural gas prices even higher, for which Russia is the no. 1 supplier to the EU, as well as being the country with the highest global reserve levels. Based on World Bank statistics, from a European benchmark of $16.12/MMBTU, in March 2022 it jumped to $42.39.
At the same time, as a result of this rise, the impact of energy costs to total production costs in Italy has risen from 4.6% in the pre-pandemic period (2018-19 average) to 8.2% in 2022 (Confindustria estimates).

Chart 2 **UREA PRICE $/T**



Source: World Bank

Along with high gas prices, the price of urea – a product on which a significant share of fertilizers for farming depends – has also jumped. In both Europe and the US, the high price of fertilizers is having a major impact on spring planting, with preference being seen for investment in soybean and other oleaginous seeds (which require less fertilizer), to the detriment of corn.
Turning to Italy, recent statistics provided by ISTAT reveal that, as of March 2022, the inflation rate was 5.8%, with a trend in domestic use up to +28.3% and the Food & Beverage sector at +5.8%.
Again in March 2022, on international markets, the FFPI (FAO Food Price Index), which summarizes price trends in key agricultural and food commodities, climbed to an all-time high of 159.4 points. All-time highs were also registered for world cereal prices, vegetable oils and meats, but, in recent months, the surge in price lists has also impacted the dairy and

Chart 3 FAO FOOD PRICE INDEX (BASE 2014-2016=100)

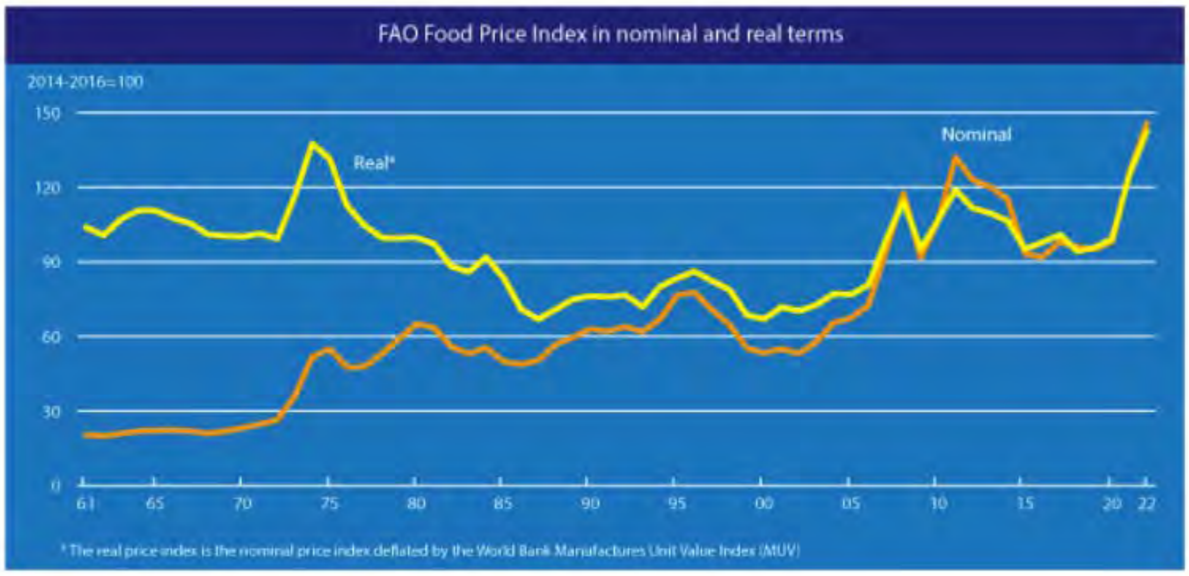


Chart 4 TRENDS IN CEREAL PRICES OVER THE LAST TWO DECADES (FAO SUB-INDEX, BASE 2014-2016=100)

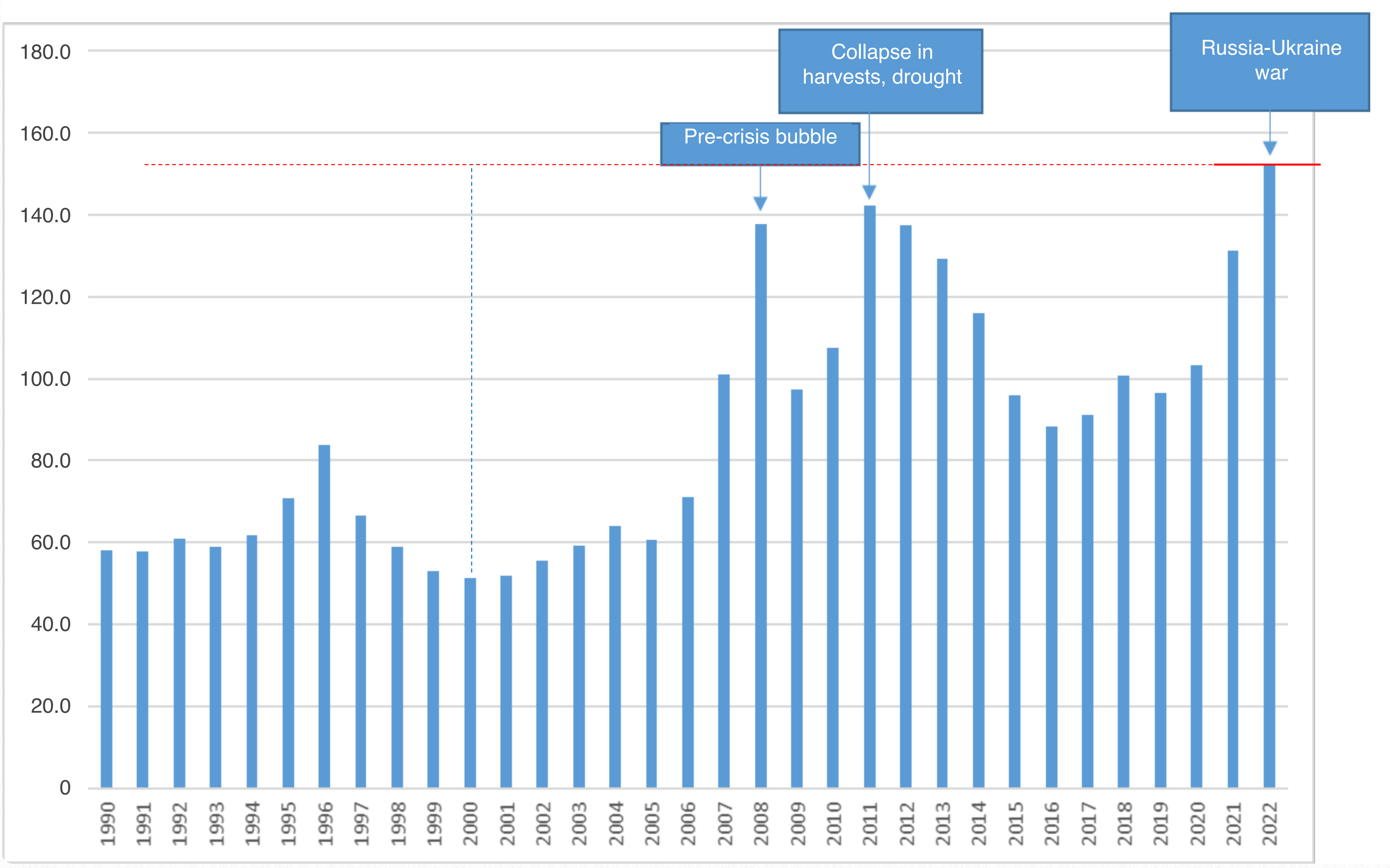
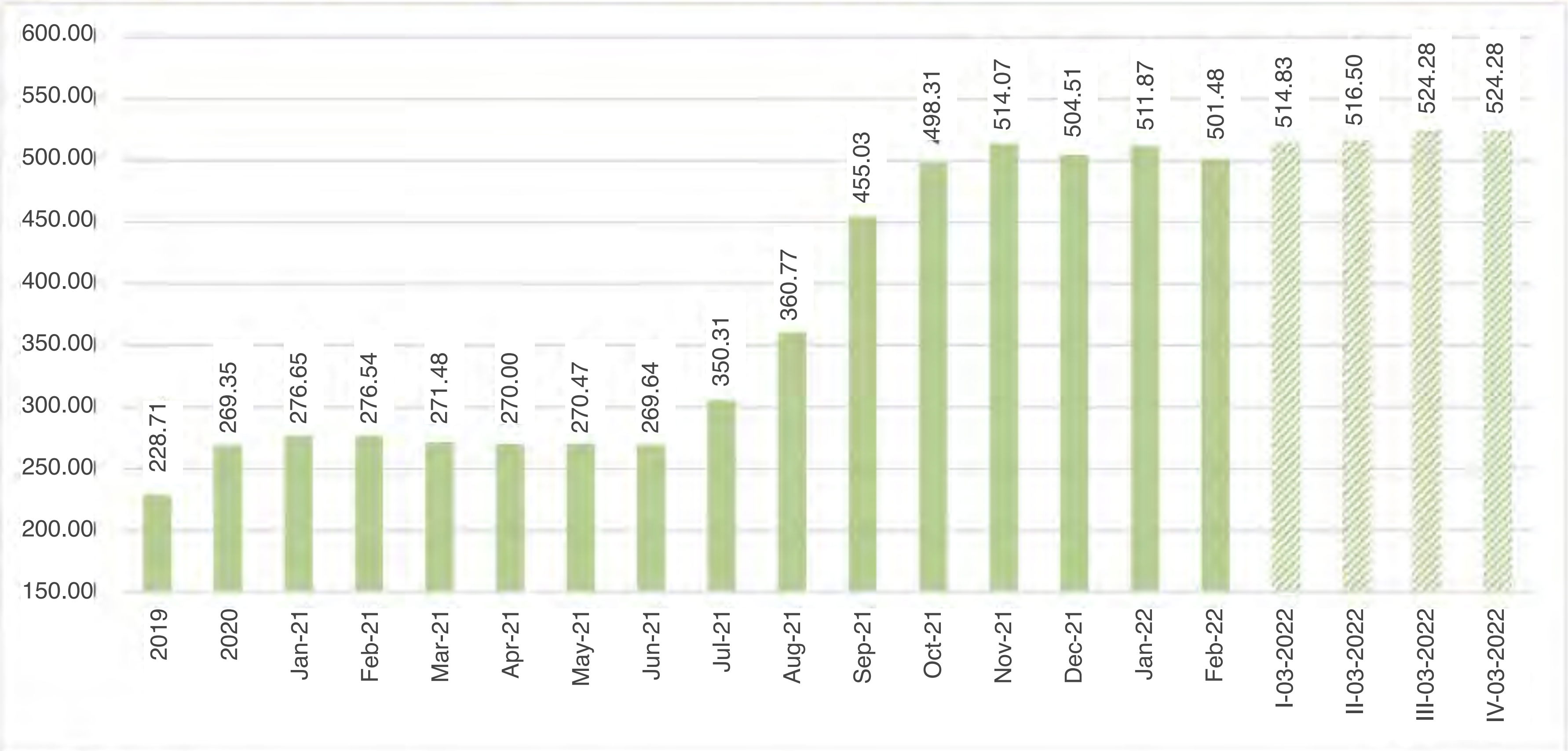


Chart 5 EVOLUTION IN DURUM WHEAT GRAIN PRICE (EURO/T)



Prices excl. VAT
Source: Ismea

sugar markets.
Compared with March of last year, on the basis of the prices published by the World Bank, the price of soft wheat (US HRW wheat benchmark) increased by 136.3%, corn by 101.9% and soybean by 95%.
Analysing the FAO sub-index for cereal products as a whole, what emerges in March is the most serious price situation since the beginning of the 1990s (i.e., when the UN agency launched its monthly preparation of the Food Price Index), with the lack of supply caused by the blockage of shipping in the Black Sea, which was more serious in terms of impact on prices than the two previous shocks of the pre-crisis bubble in 2008 and the unprecedented price rises in 2011 (due to drought and the major impact on world harvests).
In terms of durum wheat, the major users of which are pasta makers, the prolonged absence of rain and record heat in summer 2021 decimated the North American harvest which reduced the annual Canadian production by 60% and also affected the US harvest (-46%).
Circumstances which had considerable impact on the exports of suppliers in both areas and limited world trade flows.

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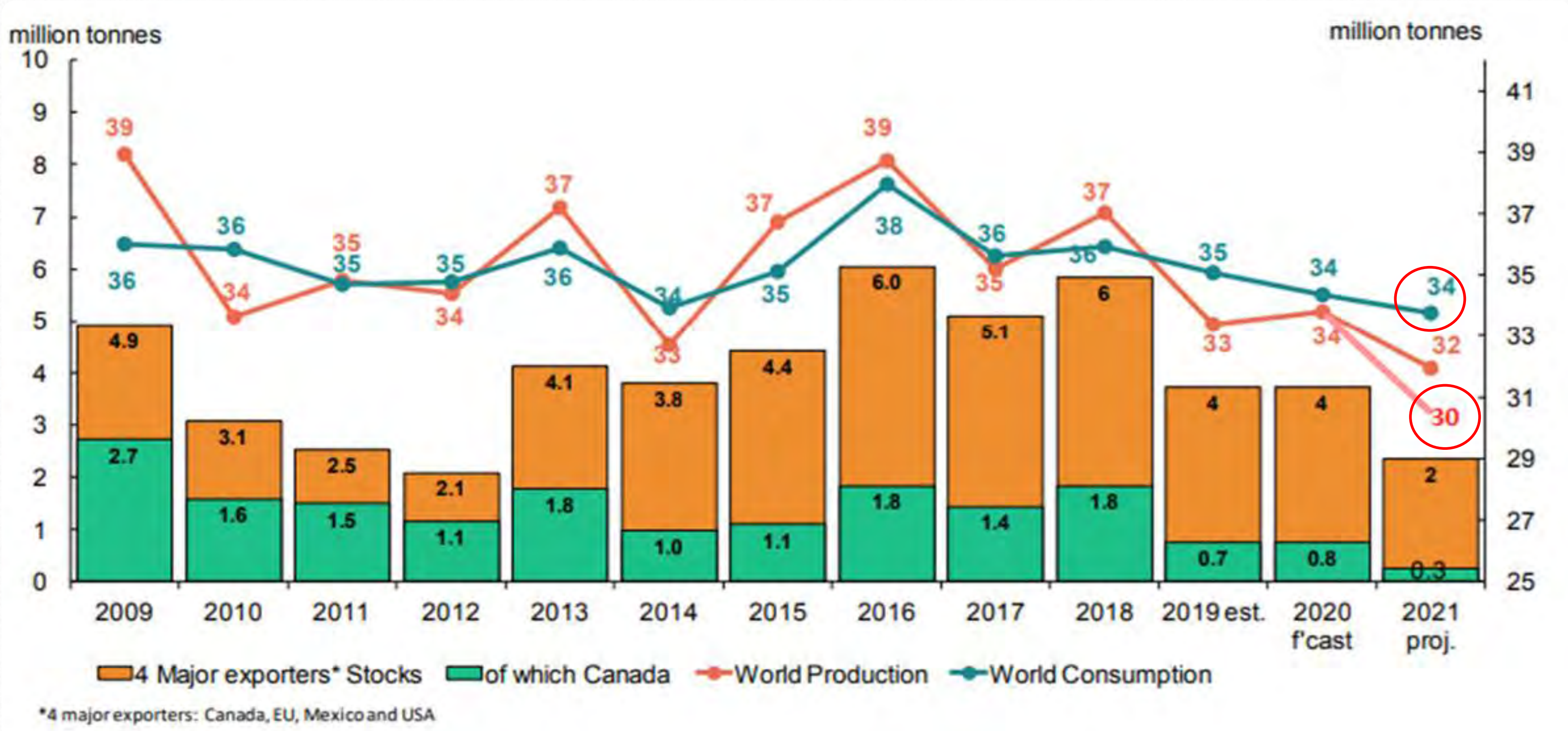
Chart 6 **GLOBAL PRODUCTION OF DURUM WHEAT**



Source: IGC

The lack of supply, especially from Ottawa, led to a major rise in international prices, resulting, in Italy, in prices for this protein-rich product at a record level of €550/ton, compared with the normal price of €270-280.

Dependence on foreign supplies for durum wheat grain remains fairly high, with a level of domestically-produced grain stable at 56%, according to ISMEA estimates for 2020. The use of imported soft wheat is even greater, with just 36% of industrial needs met by the domestic harvest.

On a global scale, for the harvest year 2021-2022 which officially ends this coming July, durum wheat production will have collapsed (according to IGC estimates) to a level of 30 million tons, the lowest in over ten years, compared with estimated consumption of 34 million. At the end of the season, it is expected that stockpiles in Canada will only be 300,000 tons and 2 million tons for the top four exporting countries.

In terms of the new harvest (2022-23), given current weather conditions, a major comeback in durum wheat production is foreseen in Canada, with an expected harvest this summer of over 5.5 million tons, more than twice that in 2021. Exports should also increase from 2.35 to 4.3 million tons, within a context of prices that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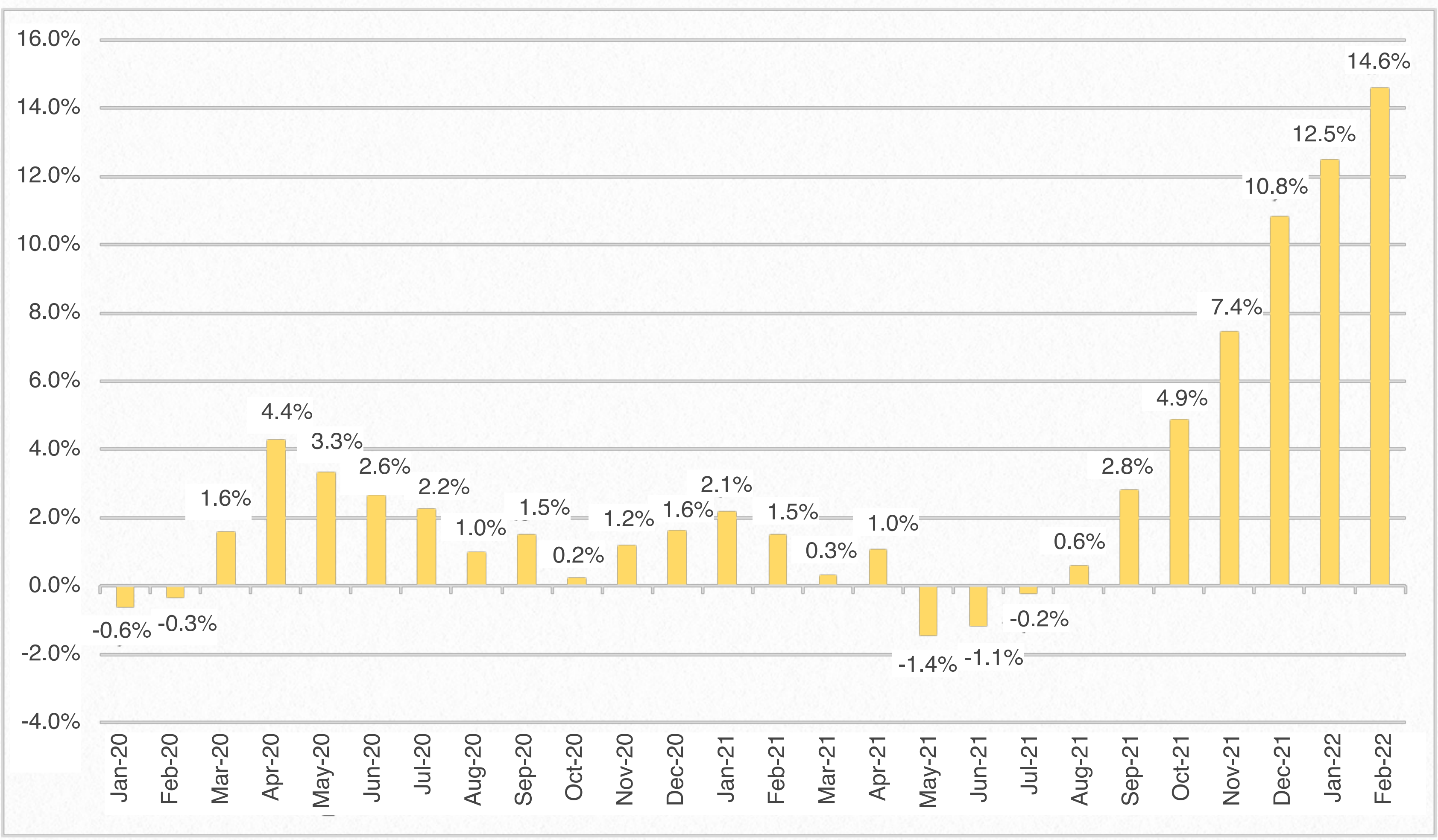
are more moderate, but still high and above the average in the past.
In Italy, the forecast based on intended planting (ISTAT survey) would seem to indicate that the coming harvest will be 3.9-4 million tons, but this forecast could prove to be less favourable, according to some analysts who also fear that drought will affect durum wheat production, especially in the Emilia Romagna region.
In terms of pasta, of which Italy is the world's no. 1 producer and exporter (the wheat-pasta sector involves over 200,000 farms and 112 pasta manufacturers, in the dried semolina pasta industrial sector alone), the major rise in flour prices has also increased prices to consumers and, in just a few months, this has brought inflation in the sector to +14.6% from just 0.6% in August 2021.
However, data still shows a negative gap of over ten percentage points compared with the hyperinflation experienced in 2007-2008 at the height of the financial bubble.

Chart 7 **INFLATION ON THE PASTA AISLE (CONSUMER PRICE TRENDS)**



Source: Istat

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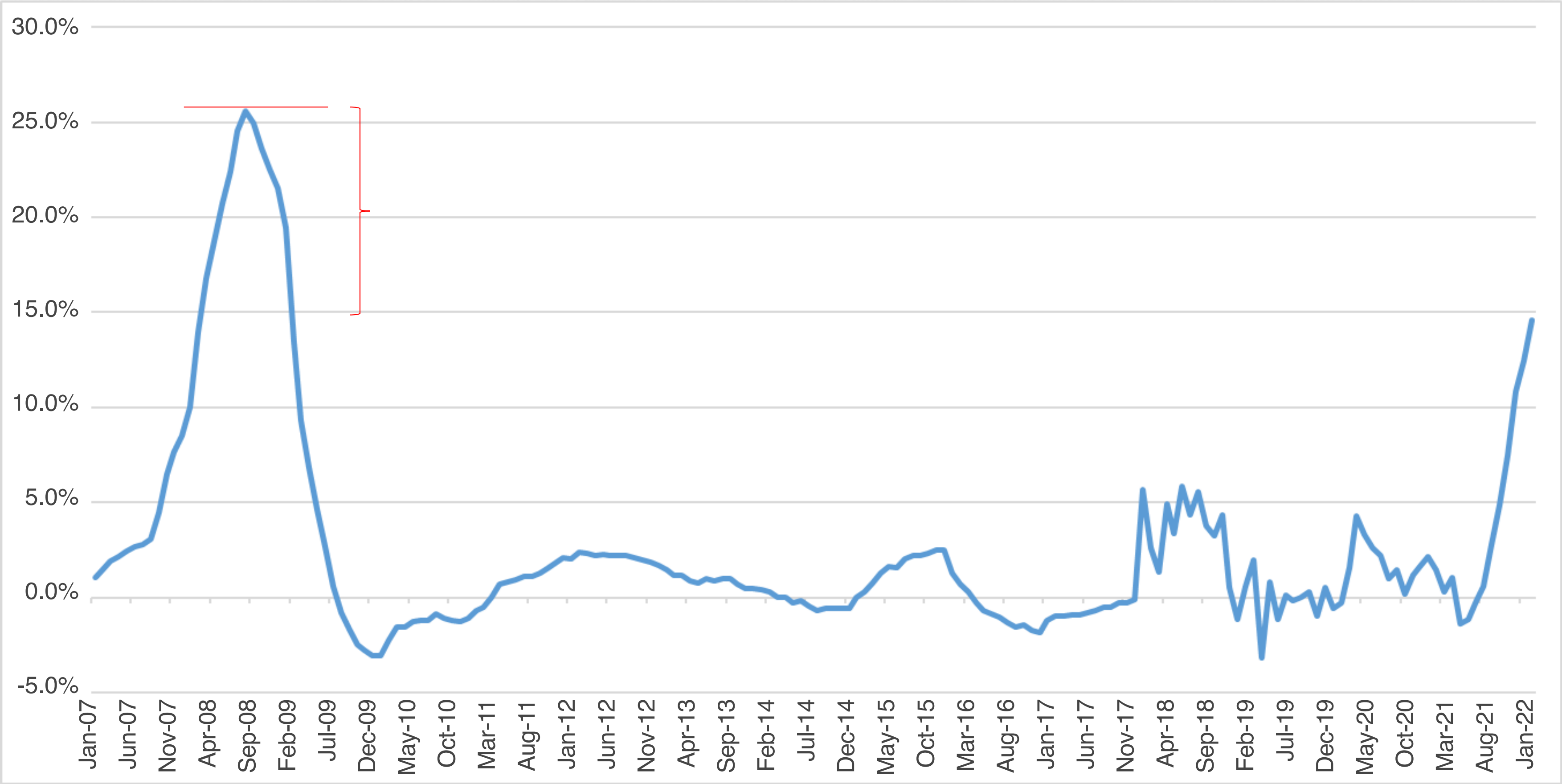
Chart 8 INFLATION ON THE PASTA AISLE – PAST TREND (CONSUMER PRICE TRENDS)



Source: Istat

To conclude, based on forecasts for the 2022-23 harvest, it is expected that the “basics” will return to more balanced levels.

Specifically, Canada’s return to normal production levels would indicate deflationary scenarios for the raw material, confirmed by increased output also in the US where there is a recovery in durum wheat investments.

As mentioned, low global stockpiles will keep international prices above average levels in the past. In addition, in North Africa, it is feared that the harvest will suffer due to drought, resulting in greater pressure on wheat purchases in other countries.

In Italy, the lack of rain is affecting primarily northern regions, while in the south (in Apulia in particular), the situation is generally under control, within a framework of normal wheat growth. Consumption and exports still risk a downturn due to the high price of pasta, including in the retail chain. High production costs are putting at risk company operating margins, while logistics bottlenecks and the high cost of sea shipping rates and transport could negatively impact on foreign trade, a factor which is also affected by the outcome of the conflict in Ukraine.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3

Success for the Annual Meeting of the National Pasta Association

National Pasta Association

Dinner and awards ceremony to close the Annual Meeting of the National Pasta Association

The general assembly of the NPA – the US association of pasta manufacturers – took place on 6-8 March 2022.

The National Pasta Association held its 2022 Annual Meeting at the LaPlaya Beach and Golf Resort in Naples, Florida on March 6-8. The meeting featured important discussions on the current state of the industry, geopolitical events and trends to look for in the future. In all, nearly 90 industry leaders attended the Annual Meeting, coming together from all over the US, Italy, and Brazil. “We are so thrilled to be able to get together to talk about important issues, current challenges, and how we can continue to build up the industry,” said Carl Zuanelli, Chair of the NPA Board of Directors and President and CEO of Nuovo Pasta Productions, Ltd. “Today we are gathered to celebrate not only the industry of a product, but it’s culture. That culture is indeed PASTA. Even with these uncertain times affecting our businesses, with unprecedented inflationary price pressures and geopolitical issues that have not been experienced since World War II, pasta remains a bastion of comfort, certainty and calming goodness. Indeed the demand for this world’s cherished product remains strong here in the United States and we must continue to guide this pasta culture into the future. The NPA Annual Meeting allows for critical conversations to be had and relationships to be built that lead to a better and bigger pasta industry.”

The stellar program included presentations on a variety of timely topics, including:

- *Welcome and State of the Industry Report* by Carl Zuanelli, NPA Board of Directors Chair, Nuovo Pasta Productions, Ltd
- *The Three P’s: Pandemic, Pasta and Partnering on Food Insecurity* by Erika Thiem, Chief Supply Chain Officer at Feeding America
- *2022 Economy – Light at the End of the Tunnel?* by Chris Kuehl, Managing Director, Armada Corporate Intelligence
- *U.S. Post COVID-19 Pasta Trends and Outlook* by Todd Hale, Principal, Todd Hale, LLC
- *2022 World & U.S. Durum Situation* by Jim Peterson, Policy and Marketing Director, North Dakota Wheat Commission
- *Legislative & Regulatory Update* by Gary Kushner, NPA Legal Counsel, Hogan Lovells US LLP.

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For the first time, NPA also included a Town Hall on the value of membership as part of the program, providing members with the opportunity to share thoughts and feedback on membership to continue making NPA a better organization for everyone involved. “We look forward to incorporating feedback from members that we heard during the Town Hall,” said Delia Murphy, NPA’s Executive Director. “The association thrives because of the strong experience, ideas and input of its members and our goal is to build a better future together.”

Rounding out the comprehensive educational experience were numerous networking events where attendees had a chance to connect and form new relationships, including the popular Executive One-on-One event, golf tournament, and the always thrilling and competitive bocce tournament.

The meeting could not have happened without dedicated sponsors, including:

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Welcome comments from Carl Zuanelli at the Opening Reception

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Pasta Long Kg-HR	660	590	525	475	430	410	365	340

SUGGESTED APPLICATIONS

PASTA

RICE

VEGETABLES

DRYBEANS

think GREEN
Lyco innovations save energy and reduce waste

Corbion Caravan, Heartland Harvest Inc., Niccolai Trafile S.r.l., North Dakota Wheat Commission, Panhandle Milling, Pasta Montana, ProvisionGard Technology, and US Durum Growers Association
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Thank you to all the attendees, speakers and sponsors who made this year's Annual Meeting an incredible success. NPA looks forward to bringing everyone together again for the 2023 Annual Meeting. Location and dates for the meeting are still being finalized but will be shared soon.


URSCHEL

4

Legume pasta: innovation from the past

Andrea Bresciani, Maria Ambrogina Pagani, Alessandra Marti
Department of Food, Environmental and Nutritional Sciences (DeFENS), University of Milan

Here is a summary of the contribution of Alessandra Marti and Ambrogina Pagani at the conference *Dried pasta, innovation and sustainability*, held at the 2021 edition of the Pastaria Festival.

Legumes have always had a central role in the Mediterranean diet, thanks to their composition; among other things, they are high in protein (17-30% d.m.), fibre (10-40% d.m.) and starch (35-68% d.m.), which is characterised by low digestibility (Tiwari & Singh, 2012). Completing the interesting nutritional profile of legumes is the presence of micronutrients (B vitamins, phosphorus, potassium, calcium and magnesium) and phenolic compounds (Tiwari & Singh, 2012). The absence of gluten-forming protein makes them suitable for consumption by individuals with celiac disease and/or gluten intolerance.

Equally important are their agronomic characteristics, which make legumes a more sustainable crop than cereals. Indeed, legumes require less use of nitrogen fertilisers and plant protection products, thus positively contributing to reducing nitrate pollution in aquifers. They improve soil structure and fertility and reduce the risk of organic soil impoverishment, thanks to crop rotation with cereals. Finally, not only does legume cultivation not require excessive water consumption, but the crops can also grow under critical environmental conditions (Alvi, 2016).

Greater consumer focus on eating foods rich in plant-based protein and fibre, with a low environmental impact – criteria met by legumes – has led researchers all over the world, and the food industry, to develop new legume-based products. Over the past ten years, for example, the percentage of new products containing red lentils has increased by more than 60%[1]. Used in a wide range of products (including snacks, bread, and pasta), not only in the form of flours but also as protein isolates and concentrates, the total value of the legume market was $17.4 billion in 2018, and is estimated to reach $ 22 billion in 2023, representing 24% growth over 5 years[2].

Of the legume-based products on the market, this work has focused on dried pasta, a product firmly rooted in Italian tradition that has, nonetheless, succeeded over the decades in responding well to the demands of consumers, who are increasingly conscious of nutritional and environmental sustainability issues (Bresciani et al., 2022a). Until the late 1990s, only durum wheat semolina was used to make dried pasta, as it


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Table 1 CHEMICAL COMPOSITION OF COMMERCIAL SAMPLES OF CHICKPEA, RED LENTIL AND WHOLE WHEAT SEMOLINA PASTA

AVERAGE NUTRITIONAL VALUES for 100 g	CHICKPEAS	RED LENTILS	WHOLE GRAIN SEMOLINA
Fat	g	6.2	2.4
of which saturated fatty acids	g	1.1	0.5
Carbohydrates	g	45.1	47.4
of which sugars	g	2.9	1.8
Fibre	g	14.0	12.0
Proteins	g	21.0	25.0

was the only pasta ingredient capable of guaranteeing the al dente consistency so important to Italian consumers. From the 2000s, with the rise in cases of celiac disease, gluten-free cereal pasta (mainly made from rice and corn) began appearing on supermarket shelves. Later, consumer attention shifted to fibre-enriched pasta (e.g. made with whole wheat semolina or ancient grains) and/or pasta rich in protein, including, of course, legume pasta.

Of the various types of legume pasta available on the market, this study examined the cooking behaviour of commercial chickpea and red lentil pasta made by two Italian producers (referred to using letters A and B). Both producers' pasta made from each of the legumes, respectively, presented similar chemical composition. By way of example, Table 1 presents the chemical composition of a sample of chickpea pasta, red lentil pasta and whole wheat pasta, for comparative purposes.

Compared to whole wheat semolina pasta, legume pasta has a lower starch content (-30%) but is higher in protein (+50-75%) and fibre (+60-95%) (Table 1). A comparison of the two legume-based samples shows that chickpea pasta has a higher fat and fibre content and, consequently, a lower carbohydrate and protein content, than red lentil pasta.

All of the pasta types presented satisfactory cooking behaviour, assessed using the conventional indicators used to assess the quality of semolina pasta (Marti et al., 2015). All of the pasta types absorb more than 100% water during cooking, with most presenting less than 10%

organic matter in the cooking water and a consistency of 400 N or above (Bresciani et al., 2022b). The latter was assessed by way of a compression-shear-extrusion test, using a Kramer cell to simulate the process of chewing the product. Only the chickpea sample presented cooking loss values greater than 11% and consistency of less than 300 N (Bresciani et al., 2022). Regardless of producer, the chickpea pasta generally presented higher water absorption and cooking loss values than the red lentil pasta, and lower consistency. Such differences may be due to the different structure and arrangement of protein and starch in the two types of legumes (Keskin et al., 2021; Wani et al., 2016) and/or the different shape of the two pasta types (”casarecce” chickpea pasta and “fusilli” red lentil pasta).

In the case of both ingredients examined, producer A’s samples were associated with greater cooking loss and lower consistency than producer B’s, both at optimal cooking time (7 minutes) and when overcooked (9 minutes). These differences – more evident in the chickpea samples than the red lentil equivalent – may be attributable to the production process given that, as already discussed, the chemical composition stated on the label is similar. A study of protein behaviour in swabs characterised by different solubilisation capacity showed the formation (during the pasta-making process) of protein clusters stabilised by strong covalent bonds (disulphide bridges) in producer B’s pasta samples, suggesting a more compact protein structure. That observation is confirmed/supported by the presence, in producer B’s samples, of thiol groups “hidden” in hydrophobic clusters (Bresciani et al., 2022).

Based on the experience of the DeFENS research group regarding semolina pasta (Bock et al., 2015; Bonomi et al., 2012), the different protein arrangement observed in the samples may be due to a different drying process. As such, the furosine index was assessed as a marker of thermal damage: pasta dried at a high temperature presents higher furosine values than products dried using medium- or low-temperature drying cycles. In the case of both producers’ samples, the furosine content was higher in the chickpea pasta, probably due to higher sugar content compared to the red lentil samples (Table 1); for each ingredient, respectively, thermal damage was found to be higher in producer B’s pasta types than producer A’s samples, suggesting the use of different drying conditions.

The pasta producers may have adopted different pasta-making conditions prior to the drying stage. Indeed, starch

pre-gelatinisation processes are adopted when producing gluten-free cereal pasta types (e.g. those made using rice and/or corn), to change the structure and properties of this component, thus improving its “matrix”-forming capacity in the finished product. Suitable starch rearrangement in a close-knit structure guarantees good consistency and reduced solubilisation during cooking (Marti e Pagani, 2013). The pre-gelatinisation process may be applied to the flour, which can then be extruded in a conventional press (as is used for semolina pasta), or directly during the extrusion-cooking process, which can be performed on a belt or using an extruder-cooker (Bresciani et al., 2021).
Unlike what has been observed in the case of gluten-free rice and corn pasta, experimental tests carried out on pilot systems at DeFENS showed that dried pasta made from red lentils and chickpeas can be produced in a continuous press, without the ingredient being subject to pre-gelatinisation treatment. Indeed, the latter does not seem to affect the cooking behaviour of the pasta. The pasta (rigatoni shape) produced by way of conventional extrusion (with or without pre-gelatinisation of the ingredient) presented low cooking loss levels (<6%) and an acceptable consistency (650 N on average). The main differences concern the surface appearance of the dried product: indeed, pasta produced via conventional extrusion using native red lentil flour (not pre-gelatinised) presented greater surface heterogeneity than the others, with the presence of white spots, suggesting uneven hydration during pasta-making (Figure 1). This defect is greatly mitigated if the pasta is pre-treated prior to pasta-making.
The study then proceeded to assess the effect of the gelatinisation level of red lentil and chickpea flours on the cooking quality of the pasta. To that end, a single mill was asked to provide one raw flour and two flours to which the same heat treatment had been applied by the producer, but at increasing intensities. In the case of both types of legume studied (chickpea and red lentil), the intensity of the heat treatment applied does not seem to significantly affect the cooking behaviour of the pasta.
To conclude, legume pasta is an innovative food that is well-suited to satisfying modern consumers’ demands in terms of nutrition and convenience. The legume pasta currently available on the market presents good cooking behaviour, albeit with certain differences, probably attributable to differing production processes. Experimental tests suggest that, while it is possible to produce legume

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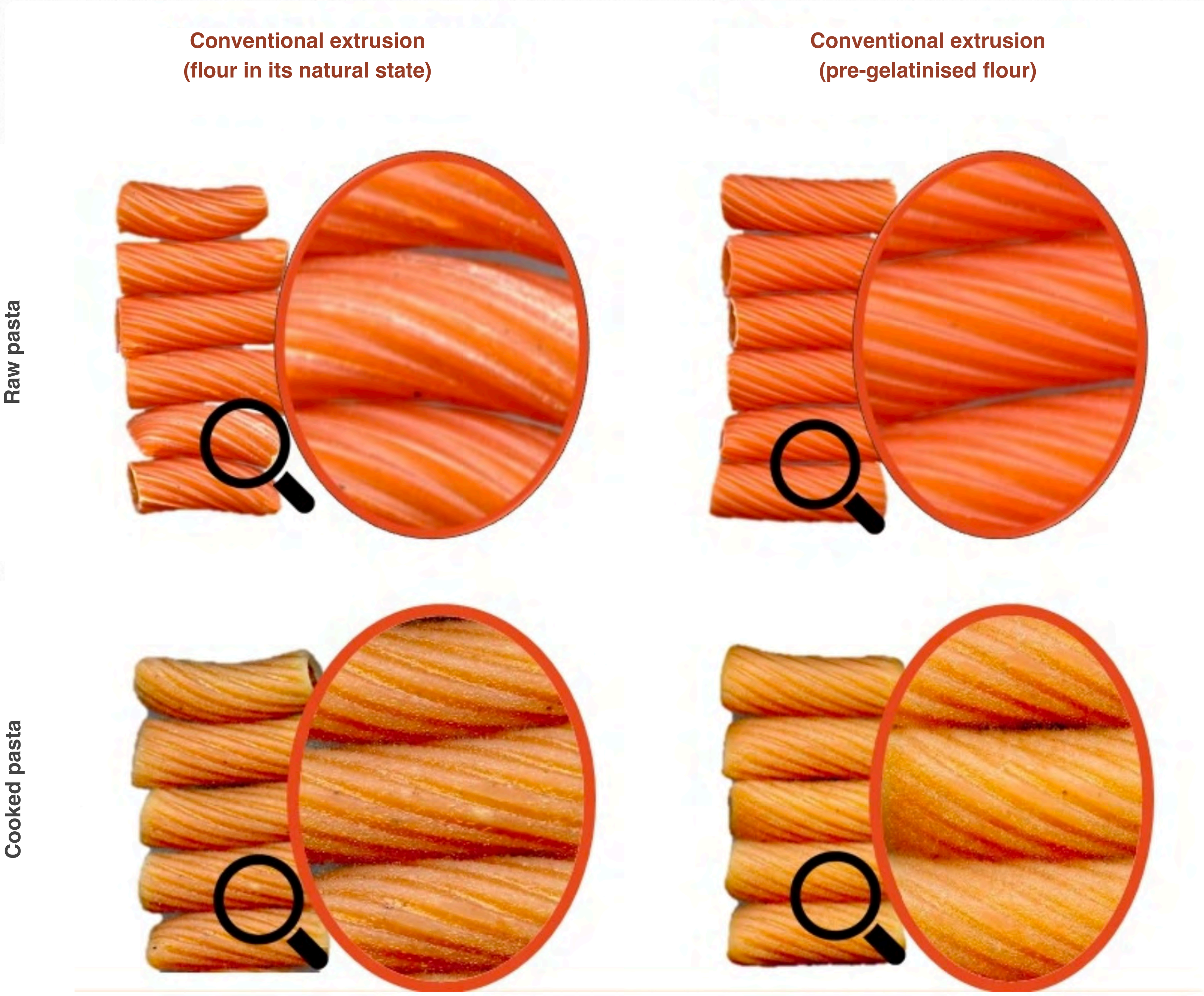
Figure 1 **RED LENTIL PASTA BEFORE AND AFTER COOKING**



pasta via conventional extrusion using flour in its natural state (not pre-gelatinised), pre-gelatinisation certainly improves the hydration stage and, therefore, the appearance of the finished product. Nevertheless, the results obtained to date seem to indicate that the pre-gelatinisation level does not significantly affect the cooking quality of the finished product. If such indications are confirmed by research currently under way, it may have interesting economic implications in terms of reducing processing costs.

Notes

1. https://www.mintel.com/press-centre/food-and-drink/super-growth-for-super-foods-new-product-development-shoots-up-202-globally-over-the-past-five-years
2. https://www.marketsandmarkets.com/Market-Reports/pulse-ingredients-market-246427813.html

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5

Post-pandemic: fresh pasta, small brands and gluten-free on the rise

Pastaria Centre for Economic Research

Here is a summary of the contribution of Sara Beretta and Matteo Bonù at the conference *Market, consumption and global trends*, held at the 2021 edition of the Pastaria Festival (Milan, 26 October). Nielsen experts will also be among the speakers at the 2022 Pastaria Festival, to be held this coming 30 September.

Having overcome the most critical phase of the coronavirus emergency following the first lockdown in Spring 2020, with data now available, it can be seen that the increase in the prices of raw materials that started in the second half of 2021 has not had a significant effect on the "fast moving consumer goods" market (total of mass consumption products).
According to the market research firm Nielsen, in a study presented at the final event of the Pastaria Festival, within the context of a rapid rise in inflation, consumers have changed – but not radically – their buying habits, showing greater caution, at least in the macro-trends, also due to the continuation of the health emergency. But, in any case, they have not exhibited any substantial change in attitude and perception, especially regarding product quality and evaluation of the advantages which are not purely based on price.
In the case of pasta, using as a reference the most recent trends seen in four major European markets (Germany, France, Italy and the United Kingdom), it can be seen that, in comparison with 2019 (pre-pandemic phase), in 2021 there was a positive, although relatively modest, shift in volume sales. There was also better performance in monetary terms, not due so much to price increases, but to changes in the composition of the products purchased. Therefore, on the basis of statistical results, it can be confirmed that the pasta market has been strengthened, despite the "slump" in 2021 in the wake of peak sales during the first year of the pandemic.
In Italy, which is the largest pasta market of all, small brands, usually in the "premium" price bracket and therefore with unit prices higher on average than the large brands and private labels (distributor label products), are those that, not accidentally, have performed best, leading to growth in value of sales higher than that for volume–confirmation of the upgrading in quality seen over the last twelve months. In fact, the impact on the total dry pasta market of small and medium brands has grown noticeably in both Italy and France, to the detriment of mainstream brands and mass retail distribution labels. In this area, there has also been significant growth in pasta made from flours other than traditional semolinas, with sales led, once again, by small brands.
To conclude, it can be stated that, in light of objective evidence and at least for 2021, the increase in raw material prices has not had a significant impact on trends in pasta consumption which, instead, for the four countries examined in this study, showed a change in the mix of products purchased

TECHNOLOGY PERFORMANCE RELIABILITY

CUOCITORE LINEARE
LINEAR COOKER

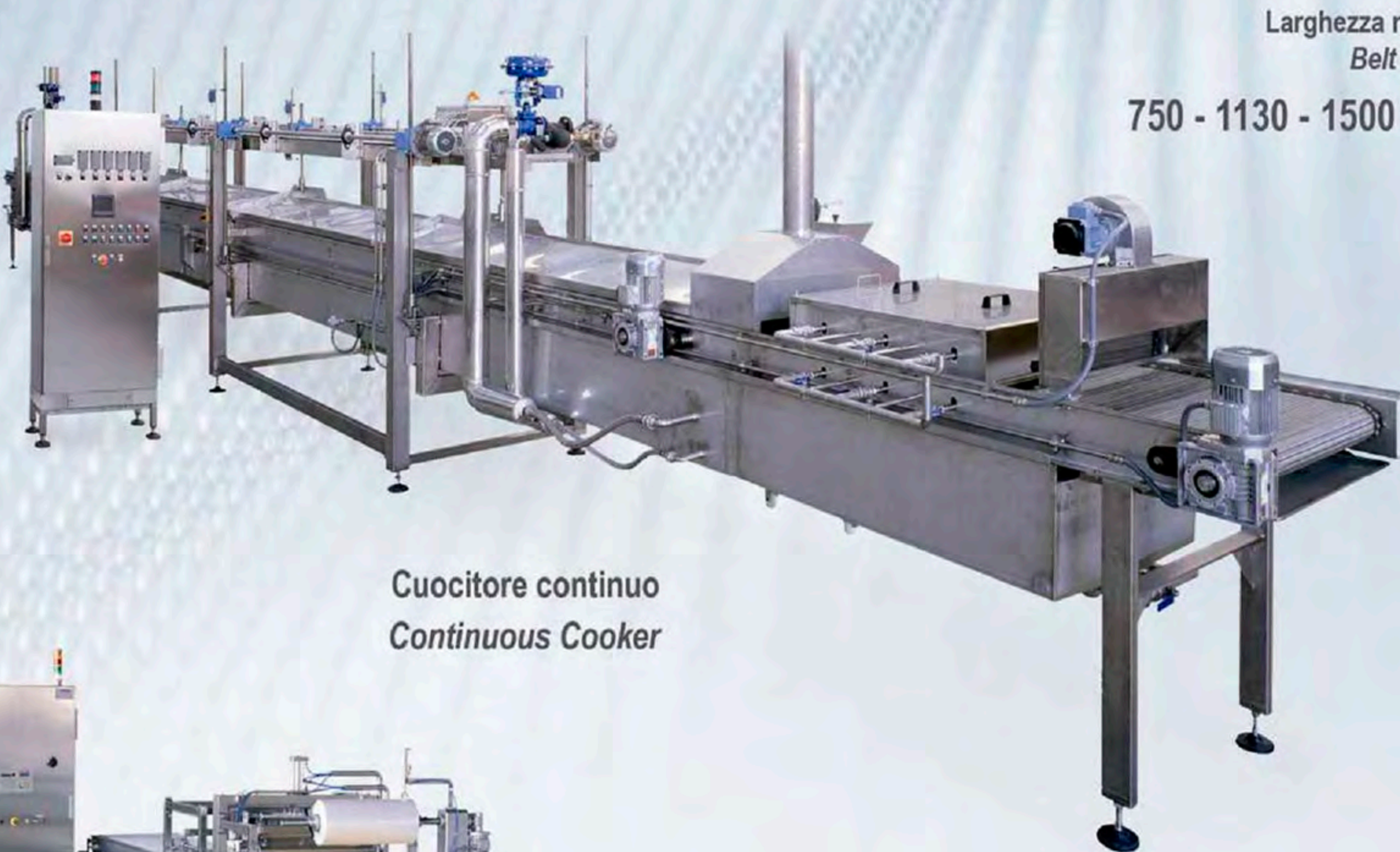
FOODTECH S.R.L.
FOOD PROCESSING EQUIPMENT

100 - 1000 kg/h

Prodotti: paste ripiene, sfoglie con interfoglio, cannelloni
For processing filled pasta, sheet with interleaf film, cannelloni

Larghezza nastro
Belt width

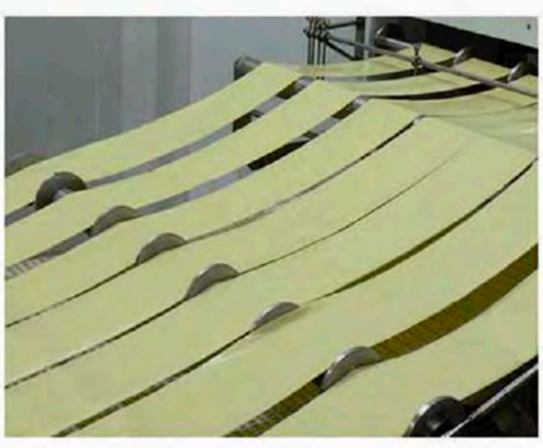
750 - 1130 - 1500 mm



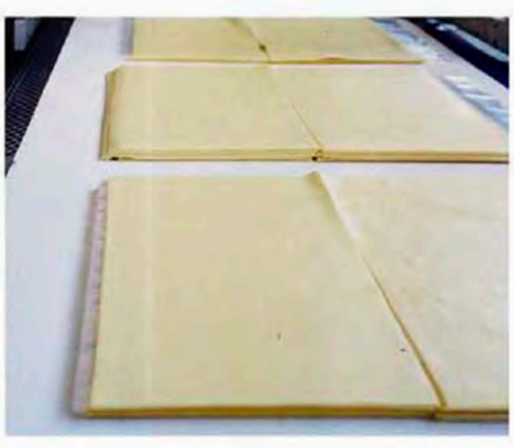
Cuocitore continuo
Continuous Cooker

Paste ripiene
Filled pasta

Interfogliatrice
Line for sheet with interleaf film



Sfoglie per Lasagne
Lasagne sheets



Sfoglia con interfoglio
Sheets with interleaf film

Cannelloni

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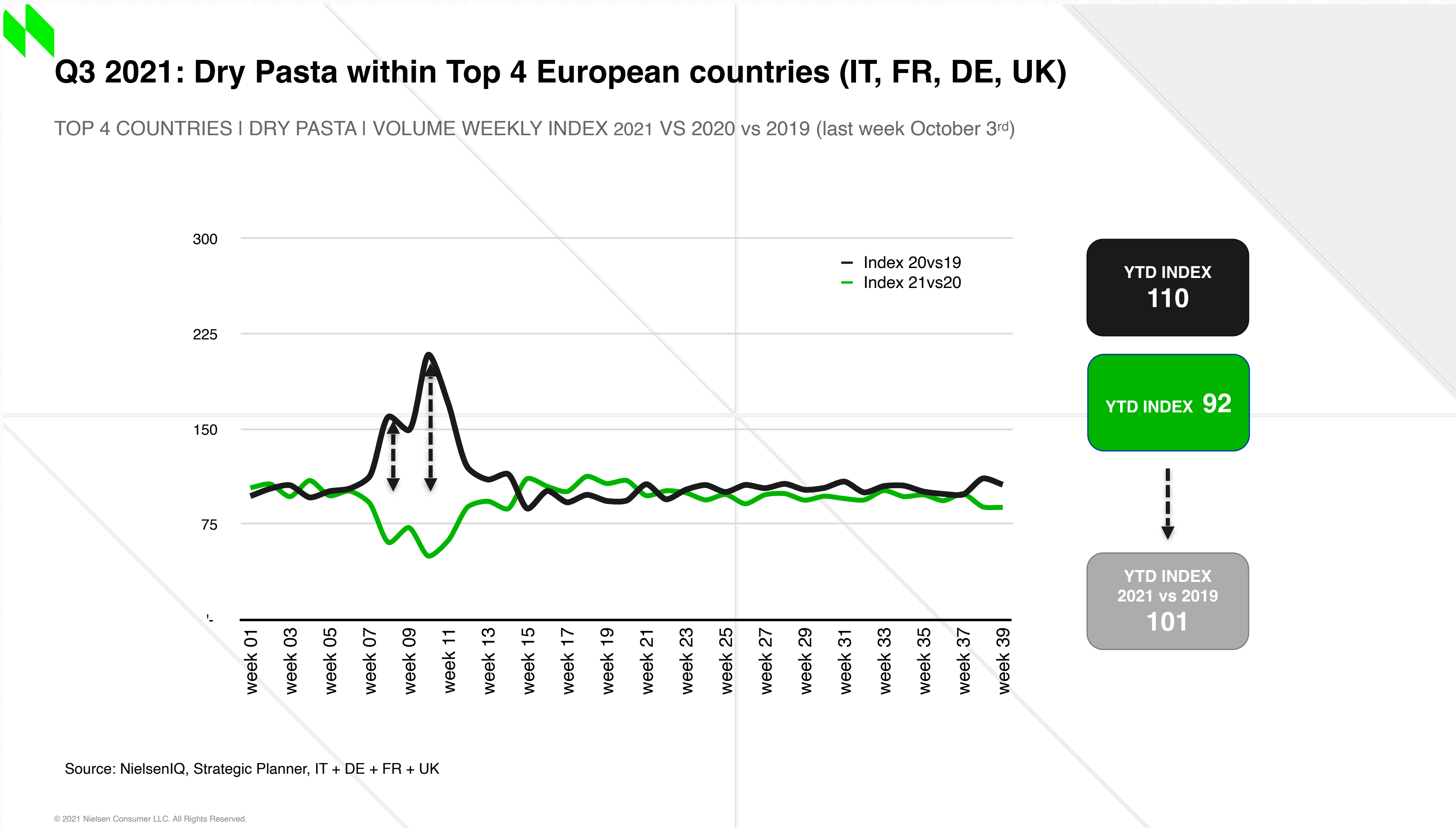
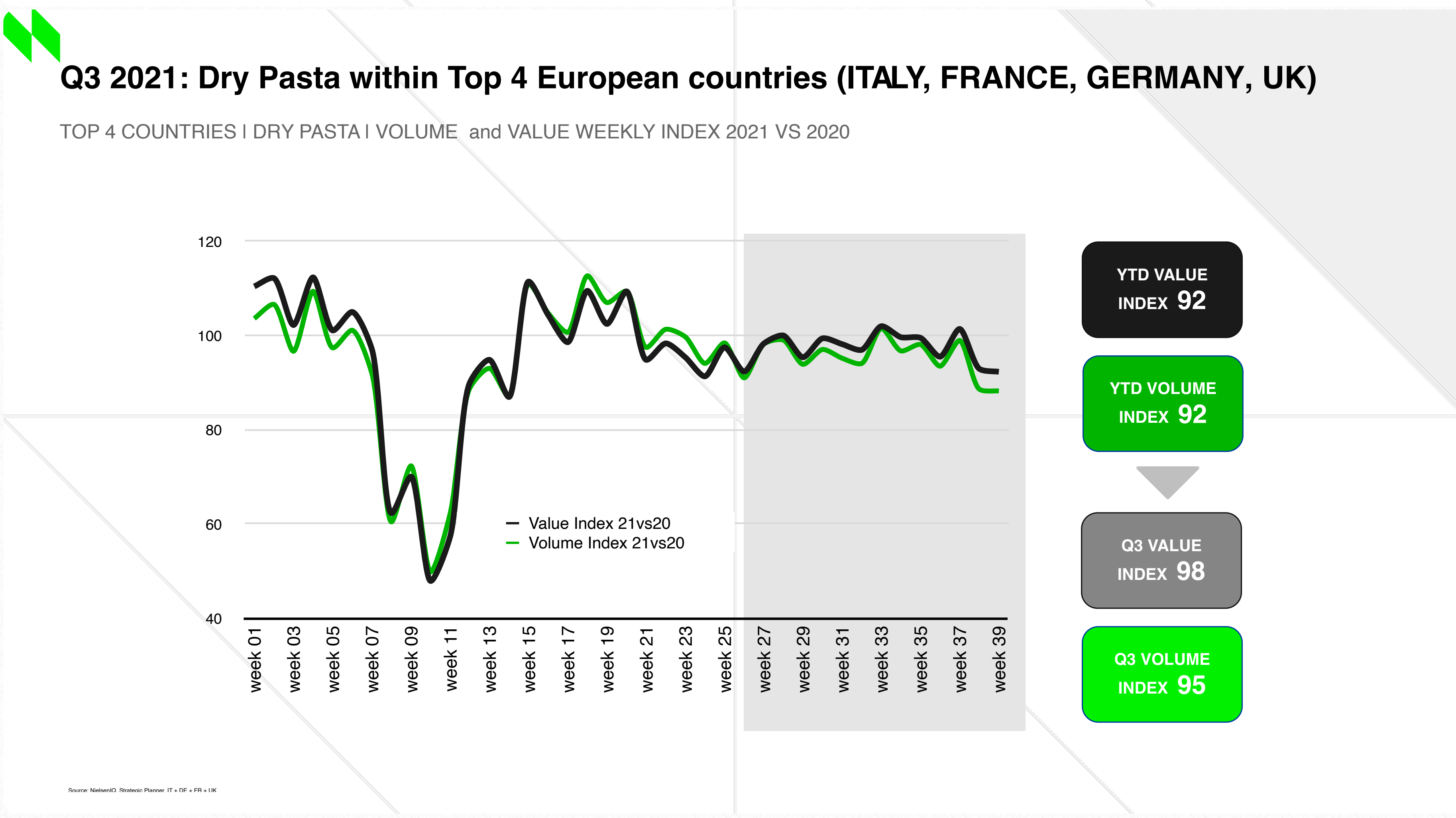




in favour of "premium" and "super premium" items.

The Nielsen focus on the Italian market confirms that the entire consumer

packaged goods (CPG) industry has had a positive five-year period that changed only at the end of 2021 after a summer which exhibited a counter-trend, but with losses that were only marginal.

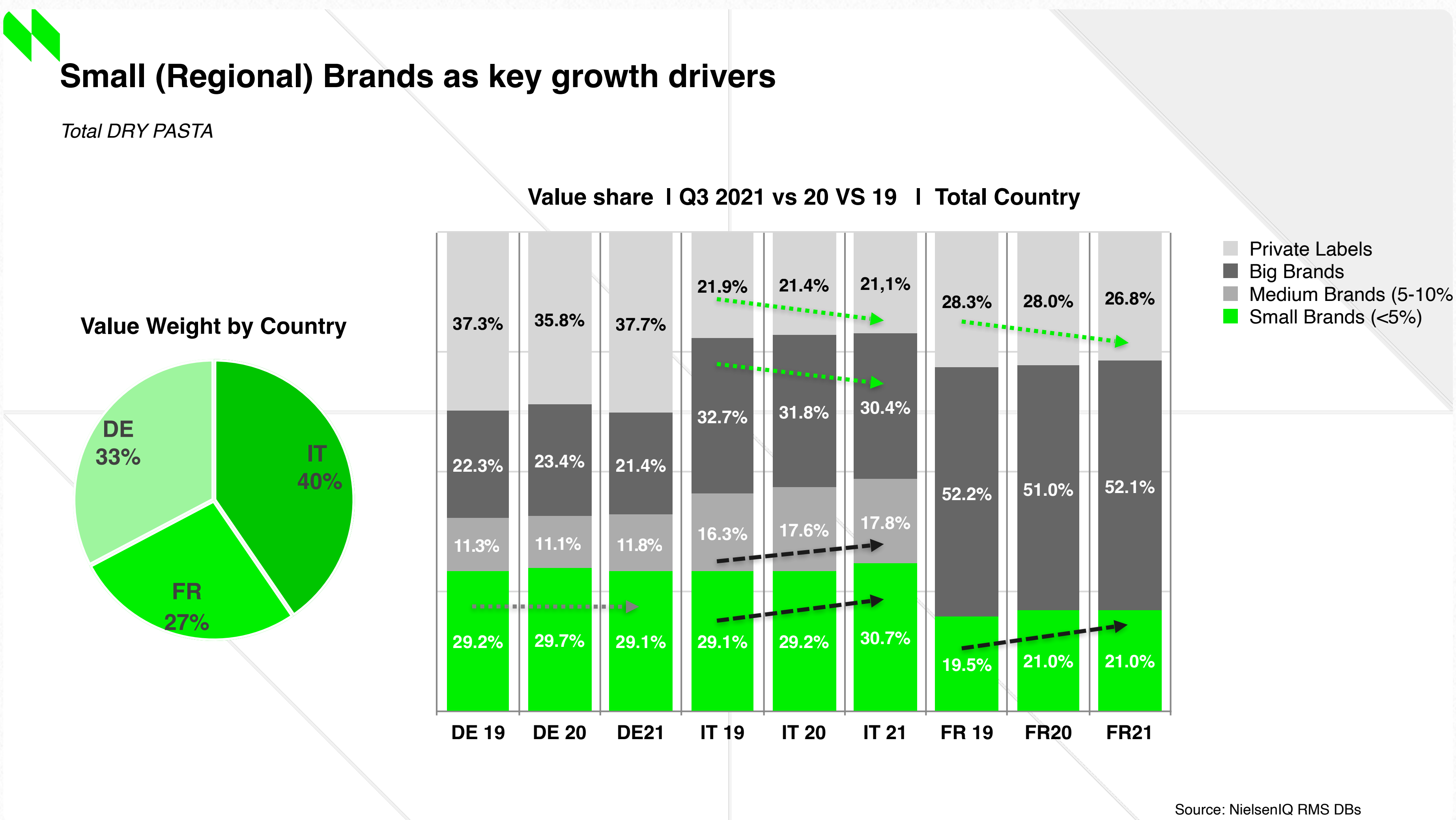
Compared with the pre-pandemic scenario, the CPG market exhibited signs of continuity, both during the peak period of the health emergency as well as after it. The superstores (hyperstores) remain the weak link, while home specialty stores and mini-superstores continue to grow.

E-commerce, especially popular during the height of the health emergency, is also doing well, as are discount stores.

Wholesomeness, Italian tradition and sustainability remain the primary drivers, but with one word of caution: the on-line trend continues, despite the slow-down in growth, and the share of on-line sales has not yet peaked.

The post-pandemic period, despite continuing uncertainty regarding the spread of virus variants, has given new impetus to non-household products and those that offer service, thus bursting the pandemic bubble of basic ingredients which now seems in the past.

The asymmetrical effects have also intensified, effects associated with different levels of purchasing power and greater income polarization, phenomena confirmed in the growth of the two extremes consisting of lower-priced



Q3 performance compared to 2 years ago

Consumers are paying more because they want, not because they are forced to.

Widening availability
Stable volumes
Increasing price

Other Flours
& Semolina standard

ITALY	CAGR Availability	CAGR Sell-out Volume	CAGR Sell-out Value	CAGR Avg Price	Price Index 2021
Big Brands	-4%	-7%	-3%	4%	103
Medium Brands (5-10%)	9%	2%	5%	3%	93
Small Brands (<5%)	**3%**	**0%**	**3%**	**3%**	**131**
Private label	-1%	-5%	-1%	4%	76
Totale pasta secca	**1%**	**-3%**	**0%**	**4%**	**100**

Growing availability
Increasing volumes
Cheap price index

Impacting PL

Widening availability
Growing volumes
Stable price

Other Flours
& Italian Brands

FRANCE	CAGR Availability	CAGR Sell-out Volume	CAGR Sell-out Value	CAGR Avg Price	Price Index 2021
Big Brands	0%	3%	4%	0%	98
Small Brands (<5%)	**3%**	**8%**	**8%**	**0%**	**201**
Private Labels	0%	1%	1%	0%	74
Total Dry Pasta	**1%**	**3%**	**4%**	**1%**	**100**

Widening availability
Growing volumes

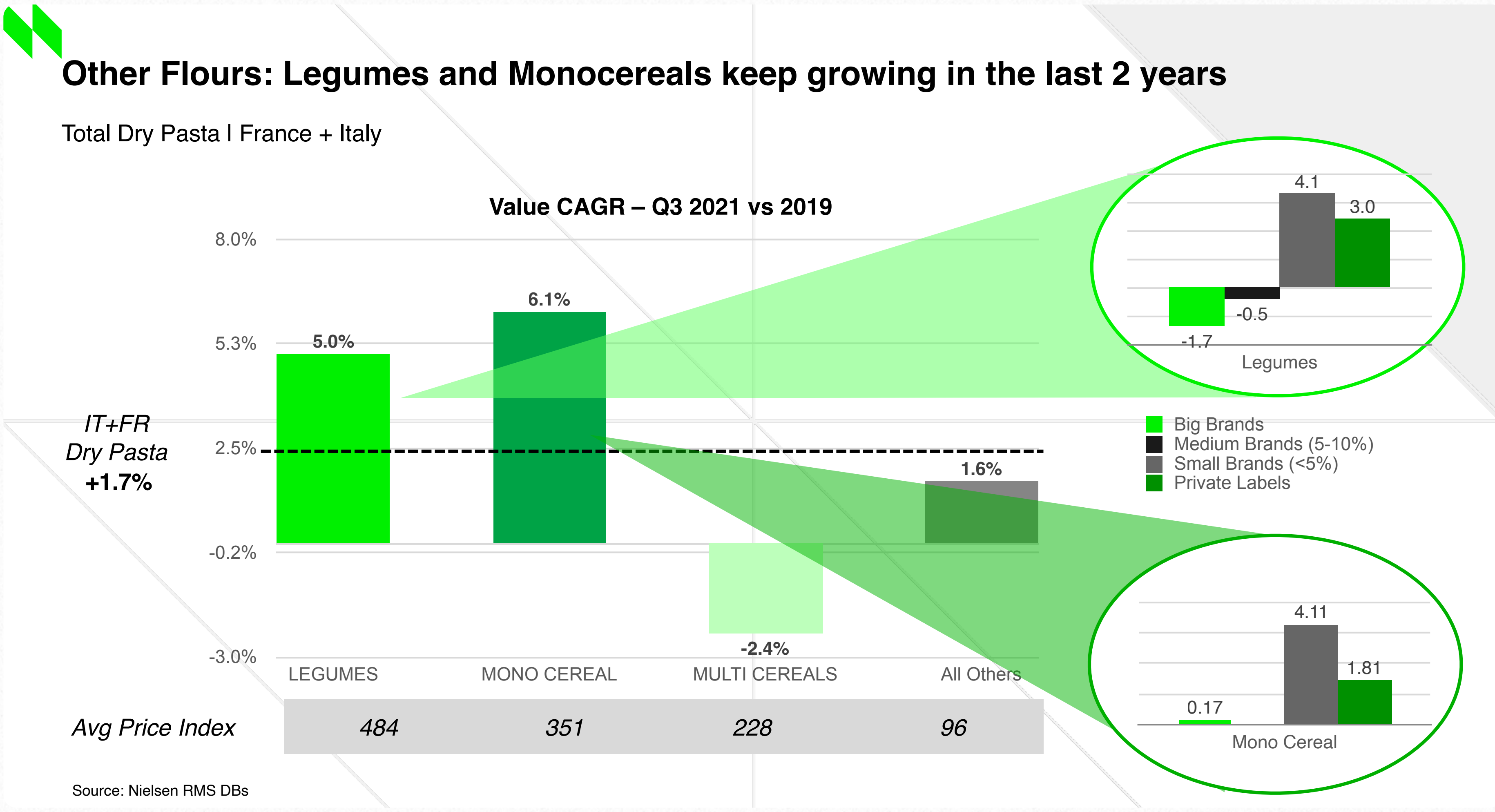
Steady availability
Growing volumes
Stable price

Italian Brands

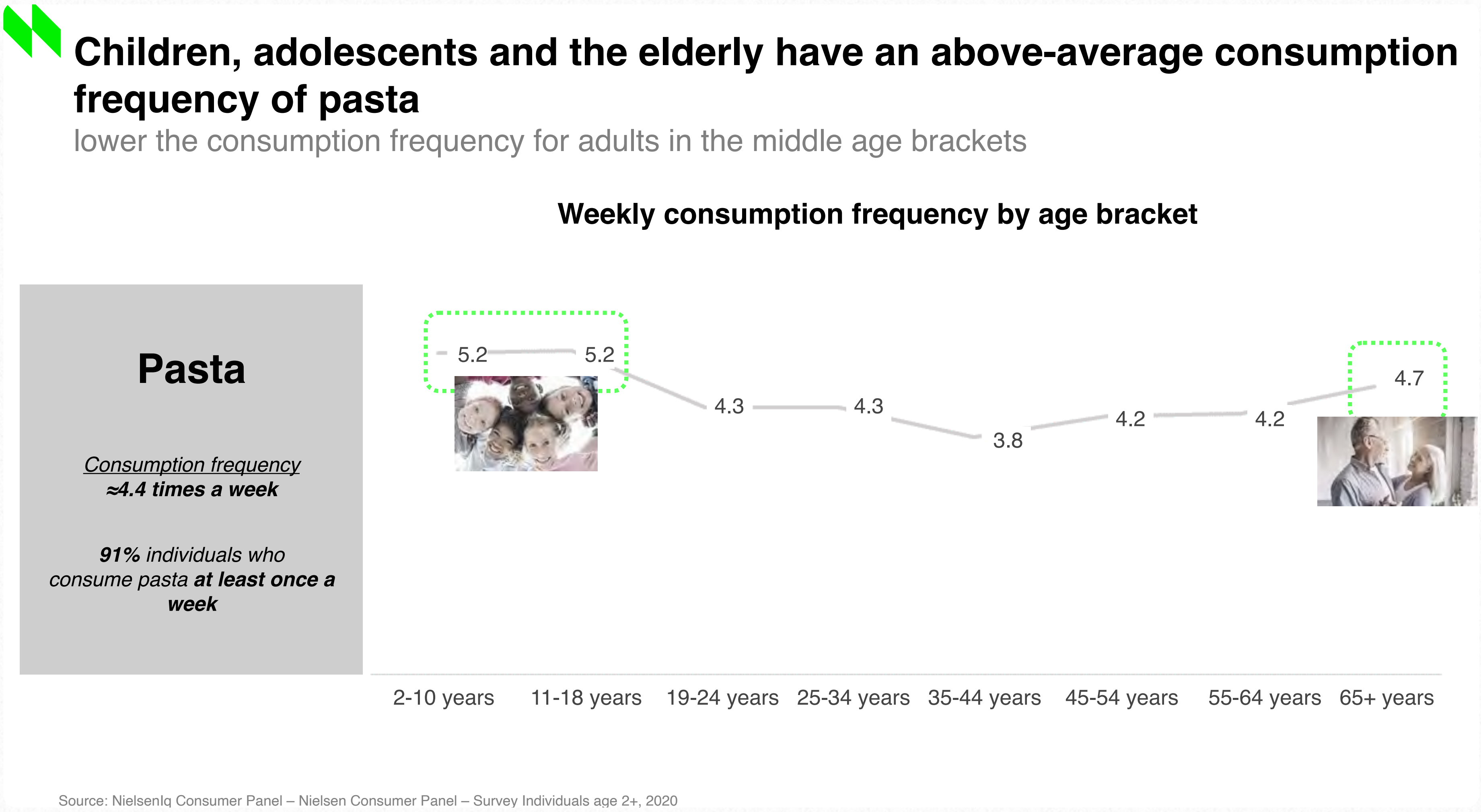
GERMANY	CAGR Availability	CAGR Sell-out Volume	CAGR Sell-out Value	CAGR Avg Price	Price Index 2021
Big Brands	-5%	-4%	5%	9%	123
Medium Brands (5-10%)	-2%	10%	9%	-1%	90
Small Brands (<5%)	**0%**	**6%**	**6%**	**1%**	**159**
Private Labels	4%	3%	7%	4%	74
Totale pasta secca	**0%**	**3%**	**7%**	**4%**	**100**

Source: Nielsen RMS DBs – Other Flours include Khorasan wheat

products and the “premium” market basket mentioned above.
Within this context, the first course sector has exhibited differentiated trends, with a slow-down in the volumes of dried pasta purchased, frozen products still growing and fresh pasta the “big winner”.
Comparison of data for 2020 and 2021 shows a decrease in long shelf-life products (traditional dried pasta) of -9.1% (-4.2% compared with 2019), against +0.8% in frozen first courses (+26.1% on 2019) and +2% for fresh pasta (+4.2%).
It should be noted that although a decrease in volume of over 4% compared with 2019 was seen, there was a growth of 2.6% in dried pasta revenues, although this was still below the overall performance of the first course sector with +3.9% between 2019 and 2021 (+4.6% not including traditional semolina).
Despite the negative trends, dried pasta remains the crowning glory of the Italian diet (91% of people serve it at least once a week), with a consumption frequency of 4.4 times a week, compared with 0.9 for fresh pasta and 1.1 for rice.
For Italians, mid-day remains the preferred meal time for eating pasta. But this preference, dictated by the need to avoid a heavy meal at the end of the day, would seem to be contradicted by statistics regarding the consumption of alternative and often highly-caloric foods, such as



pizza, traditionally eaten in the evening. The decrease in volume compared with 2019 involved the entire standard mainstream sector (major brands) which lost 8.4% with an impact of two-thirds on total sales, while standard premium increased (+7.7% in 2021 compared with 2019), with a share of 26.6%, and healthy+gluten-free (+0.9%), with 7.4% of the market in terms of volume, but with a decidedly more significant share in terms of value (15%).
Driving the standard pasta choices of Italians are organoleptic factors: cooked texture and body, origin (100% Italian wheat is nearly twice as popular as excellent quality generic wheat) and rough surface, associated with enhanced sauce-holding capacity.
Finally, it should be noted that in the healthy sector, the bulk of the first course market is whole wheat, but which grew only by a fraction, 0.6% compared with 2019. Falling by the wayside, on the other hand, were multi-grain products (-11.7%), while the gluten-free sector took off, both non-legume (+10.3%) and legume (+31.5%). Behind this is a two-fold factor. On one hand, the growing trend toward high-protein diets and, on the other, perhaps also a response to the economic crisis as an alternative to more expensive animal proteins and, therefore, also the environmental crisis, in an attempt to mitigate through lower meat consumption the impact of livestock raising on



climate-altering gas emissions.

Finally, looking to the future of the pasta and first course market, the evolution in demographics (explains Nielsen IQ) is the predictive variable that should be given greatest consideration. The Covid effect on births was highly negative, considering that in just a little over a decade, newborns in Italy decreased by 30%. Demographics have a crucial impact on mass consumption trends and, in the absence of catastrophic events, represent a variable with an increasingly long-term evolution.

How can we expect demographics to evolve over the next ten years?

Today, the barycentre of the Italian population is in the 46-56 age bracket and, since time does not run backwards, we can be certain that this peak will shift over the next decade to those aged 56-70, with a continuous decline in the younger age brackets (down to 18 year-olds and those aged 35-55).

Overall, there will be two million people less in the Italian population which will be more aged, peaking in the 56-70 bracket.

This will have significant implications:

- the demographic evolution will have a neutral impact on mass consumption, fewer customers who will spend more (the average mass consumption expenditure rises as people age), therefore the quantitative impact will be negligible;
- on the qualitative level, however, the prospects will be weightier: the drivers

Pasta is eaten more frequently at lunchtime

Value of pasta purchases

€1.1 bn

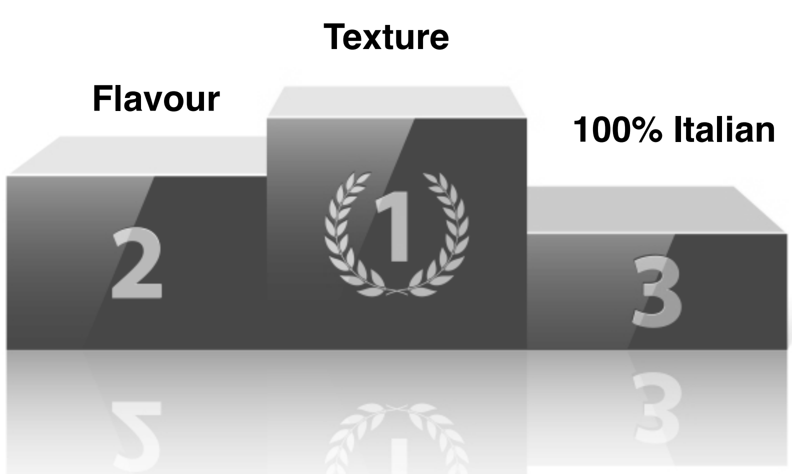
% share of value by meal

Lunch 77%

Dinner 23%

Source: NielsenIq Consumer Panel – Panel Consumer Nielsen – current as of 29/11/2020

In choosing pasta, the origin of the wheat is as important as the main organoleptic characteristics (texture and flavour)



What are the drivers in pasta choice?
TOP 5 CITED

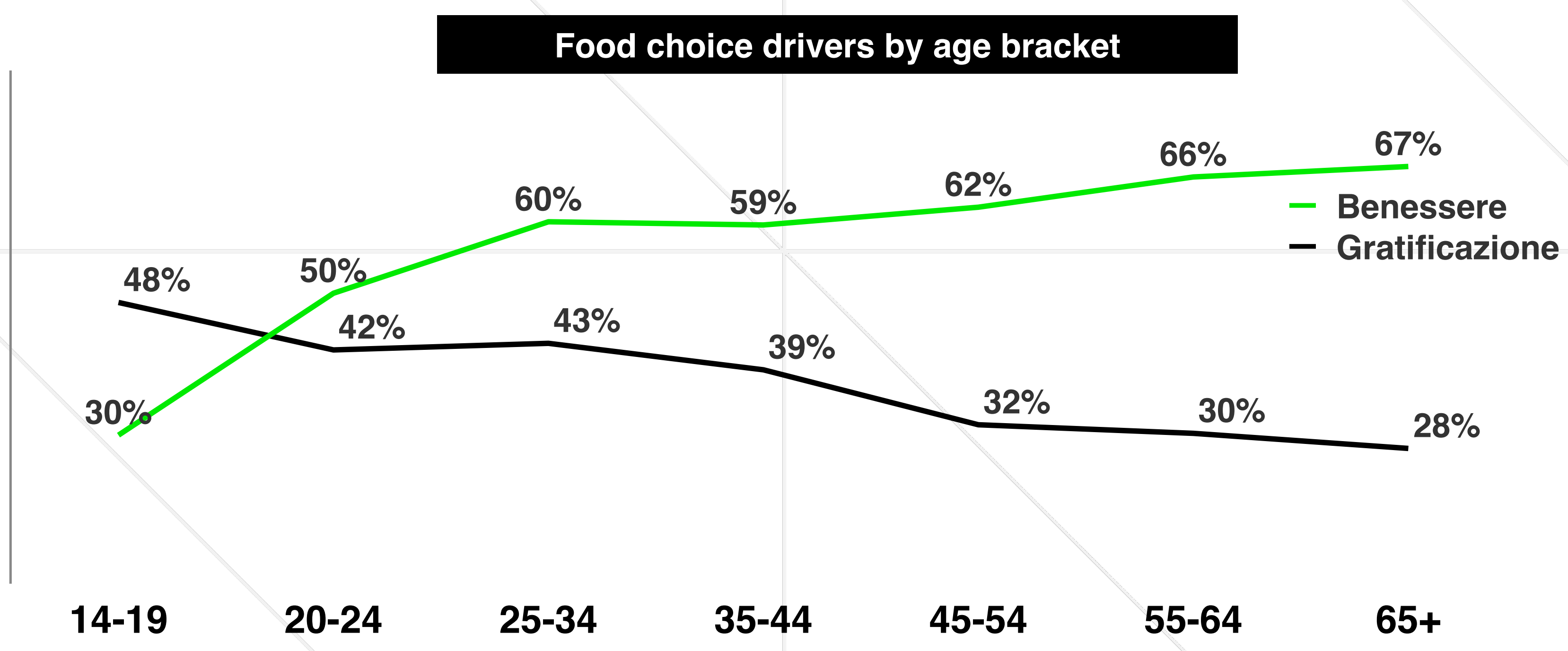
1	*Excellent **firmness when cooked***	30%
2	***Good flavour***	29%
3	*Made from **100% Italian wheat***	28%
4	*Made from wheat of **excellent quality***	18%
5	***Holds sauce well***	17%

Source: NielsenIq Consumer Panel – Panel Consumer Nielsen – current as of November 2020

and underlying motivations regarding dietary choices change considerably with age and while those in older age brackets are concerned with health and well-being, enjoyment is what interests younger brackets. In coming years, the

Well-being the key driver for winning the senior target audience

But the variations with greater added value are those that target the middle age brackets



macro-area of health and well-being will grow significantly as a result of demographic change. And there is more, because the concept of well-being is broad and is interpreted differently depending on age. While older age brackets are grounded in a very traditional concept of well-being with "medical" overtones (no sugar, no salt, easy to digest, etc.), central age groups favour a more all-round concept of well-being that is advanced and more-inclusive involving questions of sustainability, certification and services – in short, well-being without compromise that offers players in mass consumption an open field in terms of added value.

For the food sector and, specifically, the first course sector, the major challenge will be to interpret this message to respond to the requirements and emerging needs by developing strategies to transform a potential problem into an opportunity (pasta is eaten more frequently by younger age brackets than the more mature ones...).

6

Pastaria Awards 2022 for the best doctoral and master’s theses on pasta

Editorial staff

Candidate nominations are under way for the fourth edition of the Pastaria Awards for the best doctoral and master’s theses on pasta.

Kinski Editori, publisher of the specialist magazine Pastaria, has once again for 2022 established an award for the best doctoral thesis and two for the best two master's theses on research applied to the activity of pasta production.

The size of the prizes

Each of the two best master's theses will receive a prize of € 400.00 (four hundred/00) and a diploma issued by Pastaria.
The best doctoral thesis will receive a prize of € 700.00 (seven hundred/00) and a diploma issued by Pastaria.

Special mentions

Kinski Editori reserves the right to assign special mentions to master's and doctoral theses that have not been awarded the graduation prize but have been judged to be of particular value by the examining committee. Those papers receiving a special mention will be awarded a prize of € 150.00 (onehundredandfifty/00).

Awarding of the prizes

The prizes will be awarded on the occasion of the sixth Pastaria Festival (Parma, 30 September 2022).

Prerequisites for taking part

Condition for competing for the best two master's degree theses prize: to have been awarded a master's degree from a public or private Italian university, between July 2020 and July 2022, with a grade of no less than 105/110 in one of the following subjects: Biology (LM-06), Agricultural Biotechnology (LM-07), Industrial Biotechnology (LM-08), Pharmacy and Industrial Pharmacy (LM-13), Chemical Sciences (LM-54), Economic Sciences (LM-56), Human Nutrition Sciences (LM-61), Agricultural Sciences and Technologies (LM-69), Food Sciences and Technologies (LM-70), Industrial Chemistry Sciences and Technologies (LM-71).
Conditions for competing the best doctoral thesis prize: to have been awarded a research doctorate on a Food Science, Technology and Biotechnology course and the like, between July 2020 and July 2022.

Requests for taking part

Application for taking part, together with other attachments, must be sent to the Pastaria editorial team no later than 31 July 2022. Download the invitation and participation request.