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**PARMA • 30 SEPTEMBER 2022**



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# Colophon

Pastaria International DE  
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September



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Lorenzo Pini

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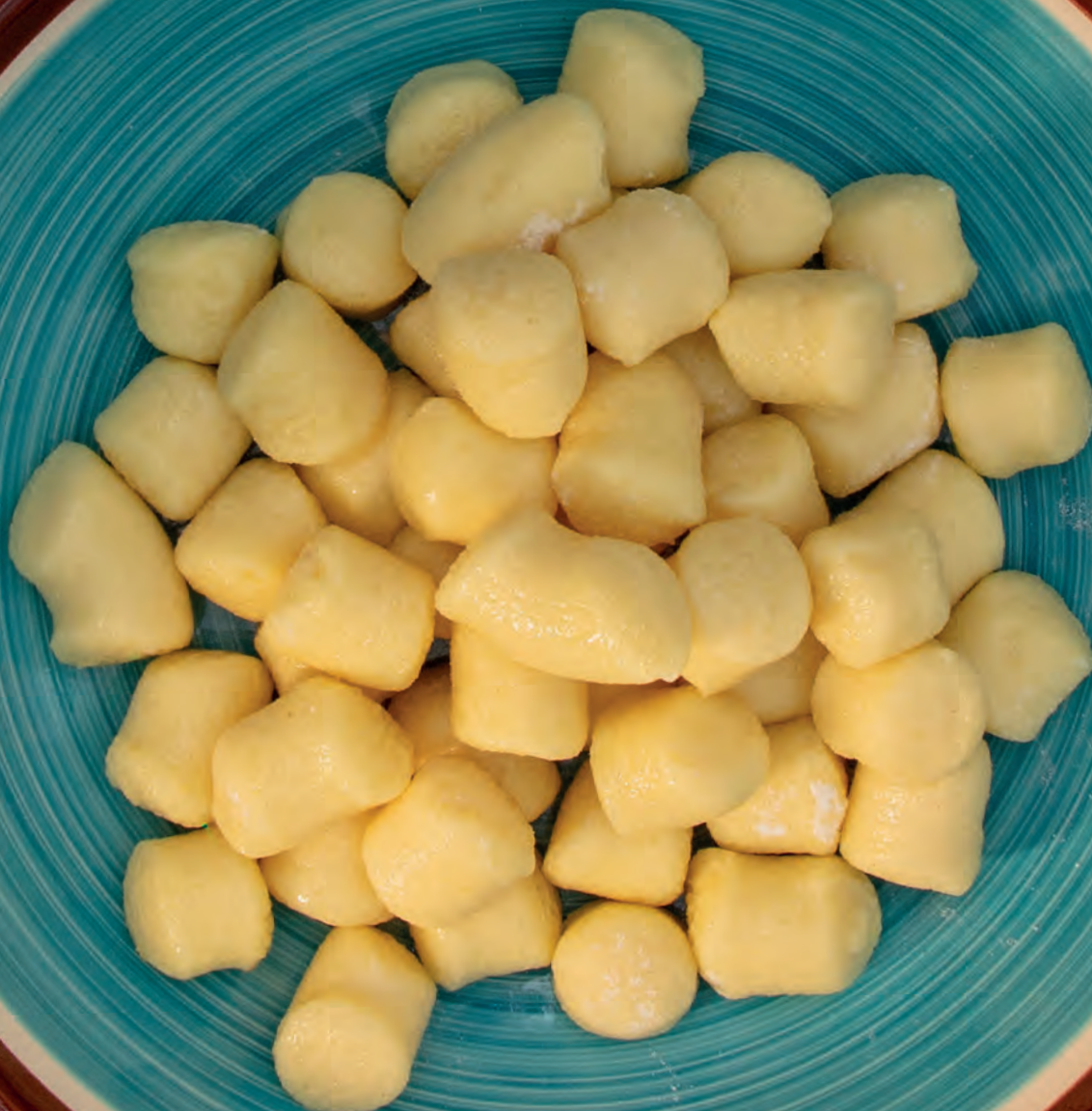
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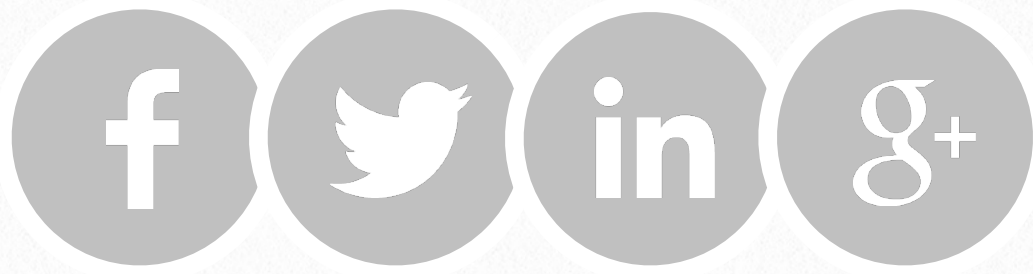
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# 1



## The complete programme of the Pastaria Festival 2022

Editorial staff



The programme for Pastaria Festival and all the information about participating in the free event dedicated to learning and professional updating for those operating in pasta factories. The eagerly awaited sixth edition of the Pastaria Festival is scheduled for 30 September 2022 in Parma.

Just a few days remain to the Pastaria Festival 2022 which, on 30 September in Parma, will bring together, including from abroad, pasta factories, associations, universities, experts and companies in the supply chain, for a day of free meetings, conferences, seminars and exhibitions that create a unique opportunity for professional training and updating on activities associated with pasta production.

## **A packed programme scheduled over several conference rooms and an exhibition space**

The comprehensive and rich programme of the Pastaria Festival 2022, which we will be disclosing over the following pages, is designed to attract the interest not only of factory owners but also managers of quality assurance, purchasing (technologies and ingredients), research and development, communication & marketing, sales and, last but not least, production, in other words, all the different professional figures who work inside a pasta factory to whom this event is expressly aimed.

The conferences, seminars and presentations will be organised in parallel sessions held in several open access

rooms and each visitor will have the opportunity to autonomously define their own training path based on their interests and corporate role.

To encourage the participation of foreign operators, several conferences will be translated simultaneously into English. Pastaria Festival will also provide visitors with opportunities to make contact, in the exhibition area, with companies supplying machinery, ingredients and services for pasta production.

## **The programme**

8:30-9:00 am

### **Admission of participants**

9:00-10:00 am | room no. 1 AUDITORIUM

### **Opening of the proceedings**

Paolo Barilla (Barilla G. e R. F.lli), Gherardo Bonetto (APPF), Riccardo Felicetti (Unione Italiana Food), Fabio Fontaneto (APPAFRE), Lorenzo Pini (Pastaria), Carl Zuanelli (IPO, NPA)

10:15-11:15 am | room no. 7 AFRODITE

### **Consumption, trends and opportunities for pasta in national and international markets**

- *Out-of-home consumption of pasta in Italy and Europe*  
Matteo Figura (NPD Group)



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- *Pasta and the new scenarios dictated by inflation: confirmations and opportunities*  
Sara Beretta (Nielsen), Serena Colacino (Nielsen), Matteo Bonù (Nielsen)

Moderator: Nicola Lasorsa.

International<sup>1</sup> conference prepared by the Pastaria Centre for Economic Research.

10:30-11:45 am | room no. 4 AMELIA

### **Fresh pasta: production, innovative ingredients and preservation**

- *The world of pasta at Tuttofood 2023 between tradition and new consumption*<sup>3</sup>  
Paola Sarco (Tuttofood)
- *New approach to energy and steam modelling. Evaluation of consumption in the fresh pasta industry*  
Filippo Catalano (University of Bari)

- *By-products of Kabuli and Apulian black chickpea milling as innovative ingredients to achieve high levels of dietary fibre and bioactive compounds in fresh gluten-free past*

Antonella Pasqualone (University of Bari)

- *The effects of bioprotective cultures on the microbial community during the storage of fresh Italian filled pasta*

Chiara Montanari (University of Bologna)

- *Cricket flours (*Acheta domesticus* L.) for the production of fresh pasta*

Andrea Bresciani (University of Milan)

Moderator: Cristina Alamprese (University of Milan).

International<sup>1</sup> - academic-based conference<sup>2</sup>.

Sponsor: Tuttofood.






# *The first Certified Sustainable Durum Wheat Supply Chain was born*



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*The project will be shown in Parma on September 30th, 2022 during the Pastaria Festival.*

More informations and contacts: [marketing@desortis.it](mailto:marketing@desortis.it), free registration at [www.pastaria.it](http://www.pastaria.it)

**Molino De Sortis**

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11:00 am - 12:15 pm | room no. 5 CARMEN  
**Quality and Automation - from the production to packaging of dried and fresh pasta: discussed by the leading players of Ipack-Ima**

- *The quality of the pasta has always been at the center of Fava research*  
Renato Dall'Agata (Fava)
  - *Pasta, fresher and for longer*  
Massimo Binotto (BMB)
  - *Mad Automation Srl - End-of-line solutions for fresh pasta manufacturers*  
Francesco Maurizi (Mad Automation)
- Moderator: Rossano Bozzi (Ipack-Ima)

Conference hosted by Ipack-Ima, Innovation partner of the Pastaria Festival 2022.

11:15 am - 12:45 pm | room no. 3 MANON  
**Organic and sustainability in the pasta supply chain. Between company philosophy and target markets**

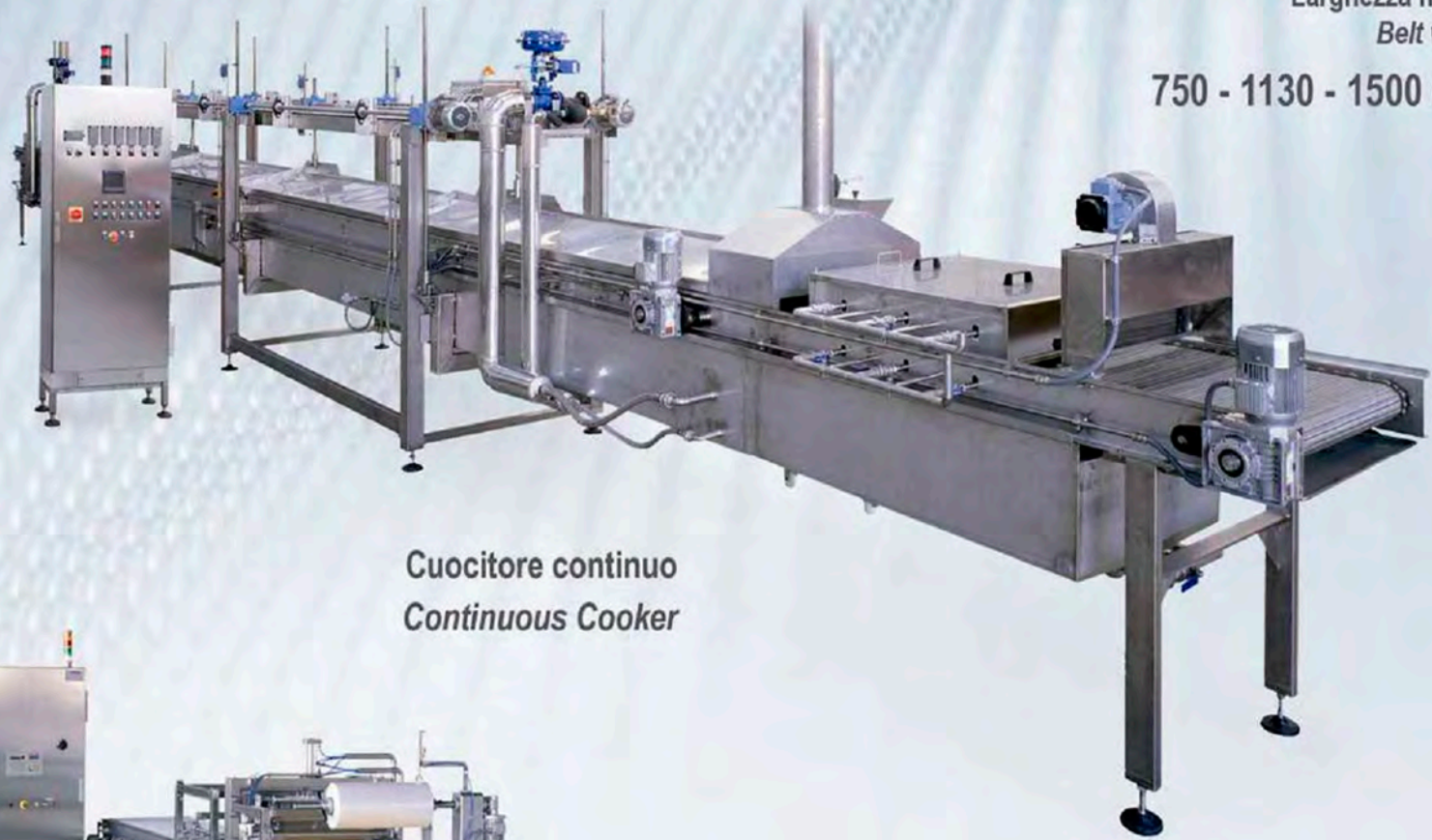
- *Sustainability: strategies and paths for small and medium-sized businesses*  
Luisa Errichiello (CNR Napoli)
- *Organic Flavours and Sustainability - communication between pasta and the beneficial properties of Organic*

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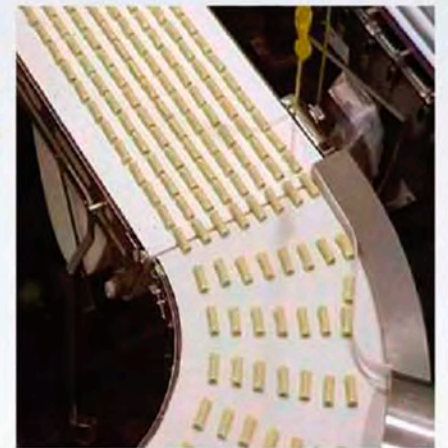
Cuocitore continuo  
Continuous Cooker



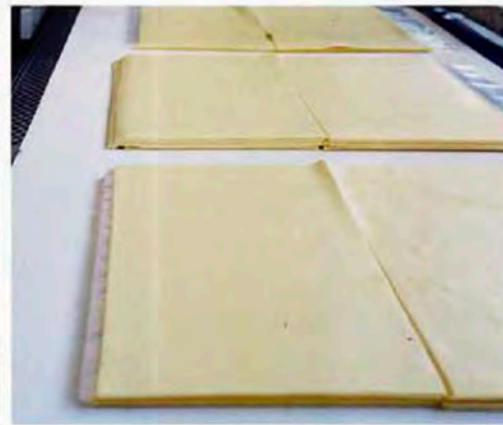
Interfoliatrice  
Line for sheet  
with interleaf film



Paste ripiene  
Filled pasta



Sfoglie per Lasagne  
Lasagne sheets



Sfoglia con interfoglio  
Sheets with interleaf film



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Monia Floridi (New Flavours), Letizia Bellucci (New Flavours)

- *Organic and Innovation*

Elisa Favilli (Probios)

- *Eco-sustainability and Organic: an added value. The experience of Gastronomica Piccinini*

Aura Ciancio (Gastronomia Piccinini)

- *Approaching sustainability in the pasta supply chain. Assessment paths and certification standards*

Salvatore Pizzo (DNV)

- *The first sustainable ISCC-Plus certified durum wheat supply chain. The experience of Molino De Sortis*

Cosimo De Sortis (Molino De Sortis),

Franz Memeo (Molino De Sortis)

Molino De Sortis and New Flavours conference.

11:30 am - 1:00 pm | room no. 9 VENERE B

**Unintentional presence of allergens in food: integrated approach for correct management in the pasta factory**

Lucia Decastelli (Experimental

Zooprophylactic Institute of Piedmont,

Liguria and Valle d'Aosta), Pietro Di

Girolamo (Conad), Silvia Gonzaga (Logos

Law Firm), Stefano Zardetto (Voltan

Group).

Moderator: Cristiano Laurenza (Unione Italiana Food).

Round table<sup>2</sup>.

1:00-2:00 pm | room no. 6 GILDA

**Light lunch**

2:00-3:45 pm | room no. 7 AFRODITE

**Pasta packaging and shelf life**

- *Mono-material and paper packaging: how SDR Pack is supporting pasta producers<sup>3</sup>*

Francesco Ferracin (SDR Pack)

- *The potential of cellulose packaging for MAP and barrier applications*

Luciano Piergiovanni (University of Milan, PackLAB)

- *The modified atmosphere and relative control systems for fresh pasta*

Fabio Licciardello (University of Modena and Reggio Emilia)

- *Extension of shelf life and enrichment of fresh pasta using by-products from the fruit and vegetable industry*

Valentina Lacivita (University of Foggia)

- *Smart packaging and digital marketing*

Francesca Mostardini (Università of Parma)

Moderator: Fabio Licciardello (University of Modena and Reggio Emilia)

International<sup>1</sup> - academic-based conference<sup>2</sup>.

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2:15-4:00 | room no. 4 AMELIA

**Dried pasta: ingredients, quality, origin and nutrition**

- *Influence of pasta “structure” on the quality and digestibility of starch in vitro*  
Elena Vittadini (University of Camerino)
- *Fractions of defatted durum wheat germ and bran for the production of dried pasta with a high dietary-nutritional and sensory value*  
Maria Cristina Messia (University of Molise)
- *Legume pasta: how to produce it and why*  
Alessandra Marti (University of Milan),  
Maria Ambrogina Pagani (University of Milan)
- *Food industry by-products to produce functional pasta*  
Federico Bianchi (University of Verona)
- *Infrared spectroscopy for detecting authenticity and fraud along the durum wheat supply chain*  
Annalisa De Girolamo (CNR Bari)

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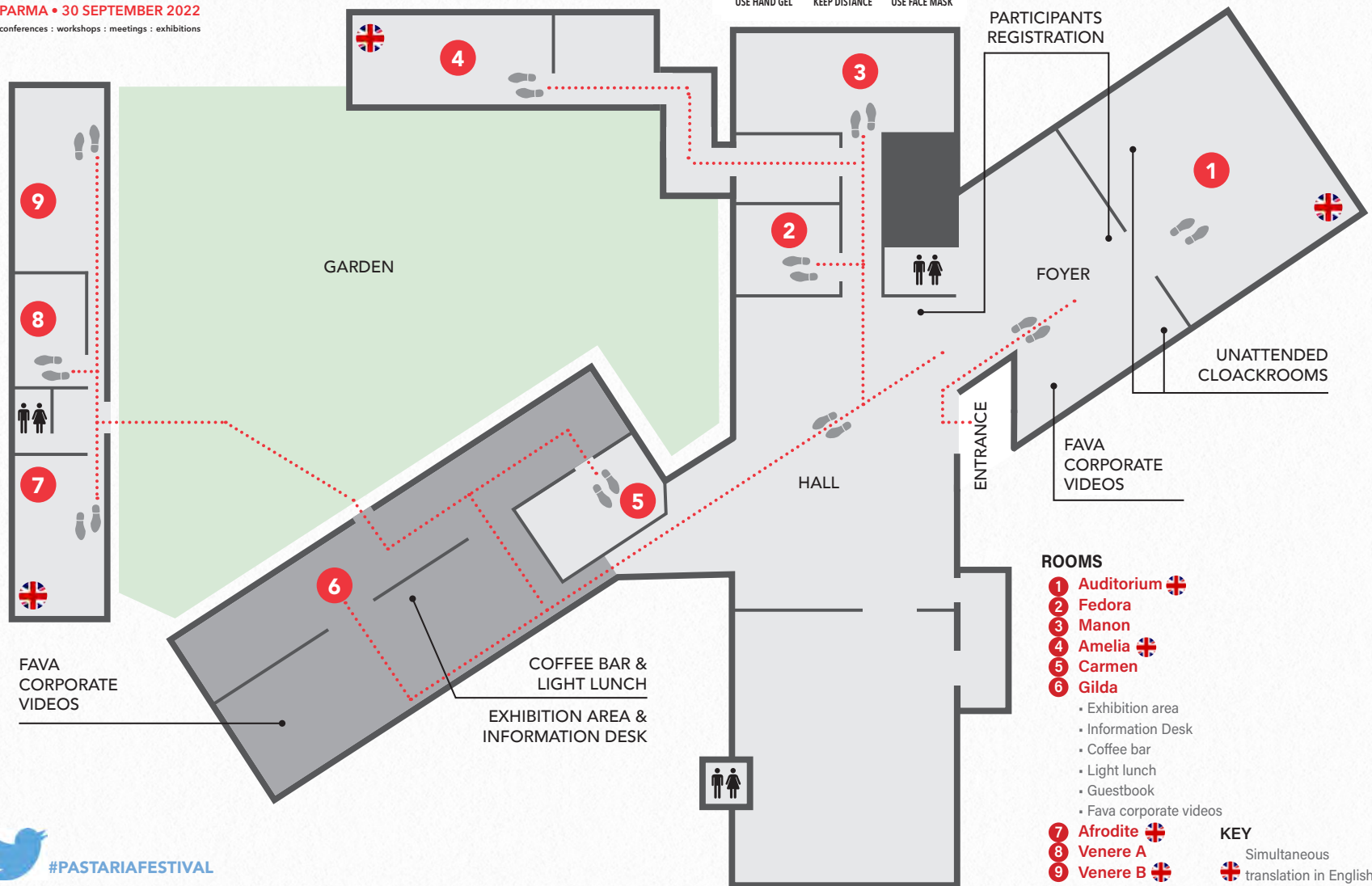
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- *Development of high nutritional value pasta using brewing industry by-products*  
 Francesca Cuomo (University of Molise)
- *Evaluation of the environmental sustainability of Senatore Cappelli organic durum wheat pasta through the Life Cycle Assessment (LCA) methodology*  
 Silvia Zingale (University of Catania)  
 Moderator: Gabriella Pasini (University of Padua).  
 International<sup>1</sup> - academic-based conference<sup>2</sup>.  
 Sponsor: Molino Casillo.

2:30-3:30 pm | room no. 8 VENERE A  
**Union des Associations de Fabricants de Pâtes Alimentaires de l'U.E. (UNAFPA) Annual Assembly**  
*Participation reserved for member pasta factories.*

2:45-4:15 pm | room no. 5 CARMEN  
**Voluntary quality certifications in small and medium-sized businesses: benefits and critical issues**

- *Greetings*  
 Fabio Fontaneto (President of APPAFRE)



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- *Product certification: a valid tool for standing out in an increasingly globalised market*

Gianni Baldini (Bureau Veritas)

- Experiences of member producers

Vito Arra (I sapori d'Ogliastra di Vito Arra), Eleonora Fontaneto and Federica Calcagno (Fontaneto), Paola Freccero (Delfino Fratelli), Attilio Gandellini (Genuitaly), Nicola Braga (Casanova Food), Dino Ligorio (Al Mattarello)

Moderator: Virna Soncin (APPAFRE).

Conference by APPAFRE.

3:30-4:30 pm | room no. 8 VENERE A  
**International Pasta Organisation (IPO)  
 Annual Assembly**

*Participation reserved for member pasta factories.*

3:30-4:30 pm | room no. 2 FEDORA  
**Concession and contributions for pasta factories**

- *Main concessions and contributions to help companies in the pasta supply chain. Focus on tax credits for 4.0 instrumental assets*



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Alessandro Faletti (ATS Associated Consultants), Michele Panisi (ATS Associated Consultants), Angela Zanini (ATS Associated Consultants)

Pastaria Seminar.

With the collaboration of ATS Associated Consultants.

8:30 am - 5:00 pm | room no. 6 GILDA and AUDITORIUM FOYER

### **Fava corporate videos**

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- *Plant engineering & energy management*
- *Technical and technological innovation*
- *Lifecycle services.*

4:30-5:00 pm | room no. 6 GILDA

### **Greetings and close of proceedings**

## **Information**

The Pastaria Festival 2022 will take place on 30 September in Parma, at the Hotel Parma & Congressi, Via Emilia Emilia Ovest 281/A, from 8:30 am to 5 pm.

## **Taking part**

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

## **To sign up**

As long as places are available, pasta makers can register using the Eventbrite platform, found [on this page](#). Registration closes on 29 September. Places are limited.

## **The Steering Committee**

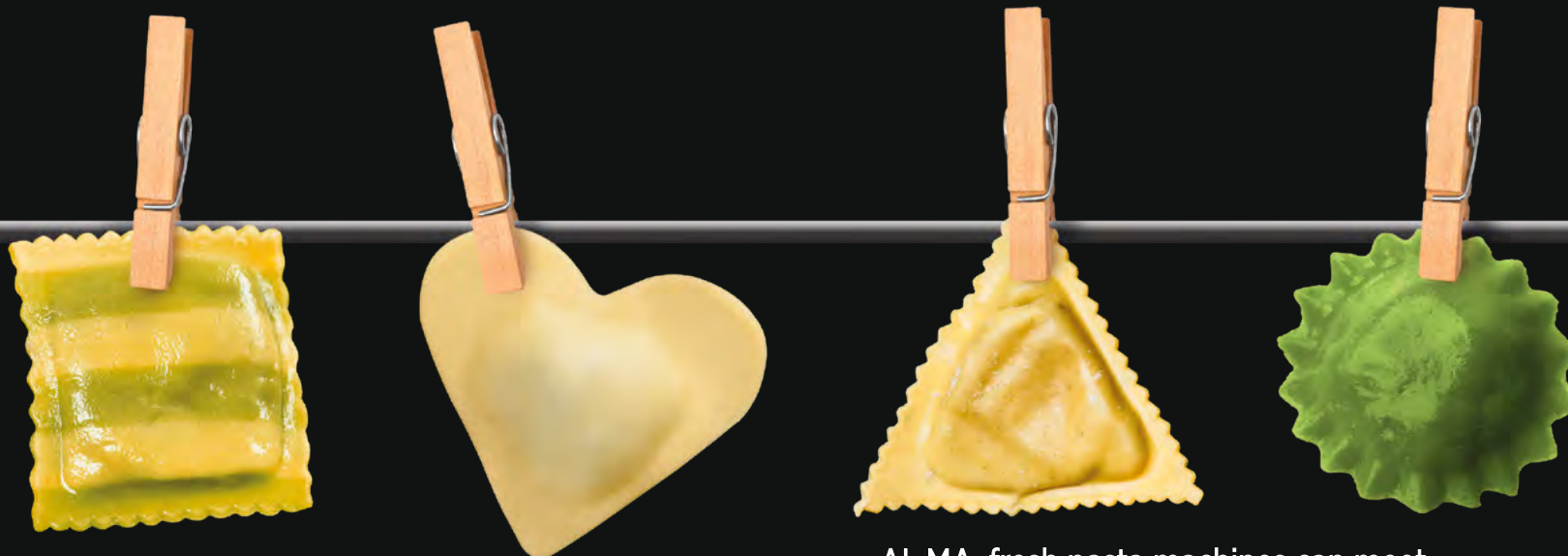
The Steering Committee of Pastaria Festival consists of a Scientific Committee composed of Cristina Alamprese (University of Milan), Marco Dalla Rosa, (University of Bologna), Daniele Del Rio (School for Advanced Studies on Food and Nutrition) Gabriella Pasini (University of Padua), Fabio Licciardello (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 (Voltan Group), Cristiano Laurenza (International Pasta Organisation), Gherardo Bonetto (APPF). The Steering Committee is coordinated by Lorenzo Pini, editor-in-chief of Pastaria.

## **Notes**

1. Simultaneous translation in English available.
2. Topics and speakers drawn up by the Pastaria Festival Steering Committee.
3. Sponsored presentation.

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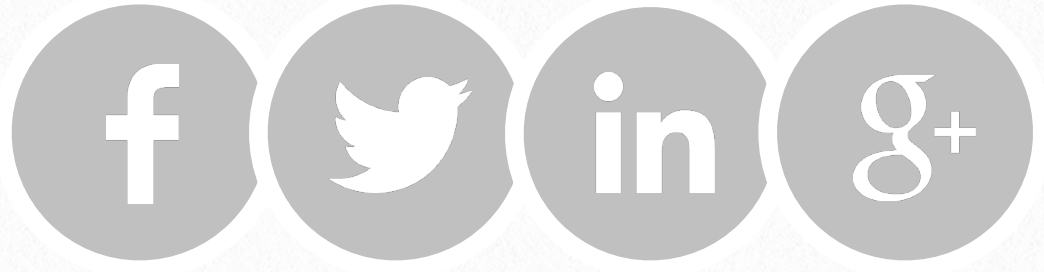
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2



# Imbutini: from Emilia, a new, interesting and well-received pasta shape

Editorial staff



The story of Flavia Valentini and her *imbutini* (little funnels), a new laminated pasta that could enhance the product line of many pasta makers.



The dream? To see her macaroni on the tables of all Italians (and why not people everywhere?). The road to achieving this? Acquaint people with the excellent qualities of a pasta shape that was created by chance and nurtured with much care. Flavia Valentini is the mother of the *imbutini*, a pasta shape born in 2014 in her kitchen in Ozzano dell'Emilia in the province of Bologna, for which, finally, there is industrial equipment capable of producing it.

Speaking with Flavia, you are carried away by the enthusiasm of someone who believes deeply in a project and sees any obstacle as another opportunity for growth. The perfect attitude for a businesswoman like her who created the Saponi in Forma company as part of the Cad-Project, but one that is unusual for a former head nurse.

The story of Flavia Valentini and her *imbutini* is fascinating because it is real and was fashioned out of optimism and the social network.

“Do you know who invented spaghetti? Can you speak to them? Fine. With me you can,” she starts by saying.

The invention of the *imbutini* has all the components of a hypothetical “food novel”. Flavia, a fan of flea markets, and specifically old artisan objects, one day ran across a strange pasta cutter. A tool

that weighed over a kilo and a half with a huge steel head. Intrigued, she asked the seller what it was used for. “It’s used to make orecchiette,” was the answer. Flavia paid €8 for it, knowing (having married someone from Puglia and versed in the region’s cuisine) that the piece of equipment would produce something else. At home, but still remaining faithful to Puglia and its traditions, she prepared a dough using semolina. ran the magic roller over the pasta and...voilà: 3.7 cm discs. She picked one up and, instinctively following her Emilia roots, she folded it as if it were a tortellino. The result was a funnel shape for which she immediately saw a future.

“I had the feeling that it was a special pasta shape. With time, thanks to studies carried out at the University of Bologna, I realized this was absolutely true,” she explains. In fact, because some time after the birth of this macaroni and in search of information about how to produce the shape on an industrial scale, the Bologna university confirmed that the pasta retained its shape during cooking, was uniform in texture, was easy to drain and collected the sauce: “The little hole at the top aids cooking and draining and its shape helps to collect sauce ‘like a spoon’. The liquid drains off and the best part of the sauce remains on the pasta. It

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is the perfect macaroni shape that can be made using any type of flour. *Imbutini* can be made of whole grain flour, semolina, egg, nettle, etc.”

Yet Flavia knows that “working the dough is the most difficult thing there is and requires the experience of people who are highly expert, because the little funnel must be treated like a mechanical component.” In fact, the university told her

that it would not be possible to create equipment to produce the *imbutini*. Perseverance. Tenacity. Flavia would not give up. She spoke to everyone, kept looking for the right network, until she found a local company that agreed to help her. “The owner agreed to meet with me, thinking I was a company,” she tells us. “Instead, he found himself in a kitchen and, later, he told me that if he had known I was a private individual, he would never

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- Per tutelare pasta fresca e gnocchi, anche da un punto di vista legislativo nel loro progressivo inserimento nei mercati europei attraverso **ECFF** (European Chilled Food Federation).

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Flavia Valentini, creator of the *imbutini*

have accepted to meet. You see, you also need a bit of luck in these things.”

Experimenting began in the garage, “like Steve Jobs”, Flavia says proudly. And after a number of attempts, in 2019, the *imbutini* were ready to be produced by machine.

And just think that, a few years earlier, the day after the official birth of this pasta shape, speaking about the discovery with a neighbour – a fellow dog-walker – who worked in the patent office, her friend told her: “There are so many patented pasta shapes, it must already exist.” But it didn’t. So, with its registration in 2014, Flavia rolled up her sleeves and created her network. “The *imbutini* were an immediate success here in my town,” she says. “People began asking me for them, so we organised festivals and the *imbutini* school until the pasta began to be carried in local supermarkets and is about to be certified as a product of excellence from the greater Bologna area.” Today, the



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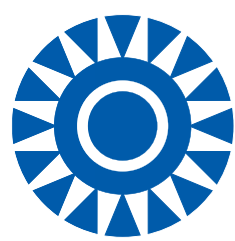
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*imbutini* are produced by the Pastificio Gastronomia Italiana in Castel Maggiore and are carried by the historic Salumeria Simoni in Bologna and a number of restaurants.

The social network has been and continues to be fundamental to Flavia's story. "Everyone helped me. Macaroni doesn't divide people, it is happy. A new type of macaroni creates enthusiasm," she says. So, her story began to be told not only locally, but also in the national press and on TV. La Cucina Italiana wrote a feature article about the *imbutini*, as did mass media outlets such as La Repubblica and Studio Aperto. Flavia also appeared on the *I soliti ignoti* program on Raidue. And today, the dishes she offers on Instagram attract interest from abroad. "A man from Brazil contacted me saying that he had found the same tool and asked if he could produce *imbutini* in his restaurant," she explains. Flavia Valentini has also become an Instagrammer. "You see, at age 60, here I am, also being a social media manager, when just a few years ago, I didn't even know social networks existed." Every two or three days she publishes a new photo and recipe and currently has over 4,000 followers "acquired one-by-one, without any kind of marketing campaign". Flavia is unstoppable. "I'm having the time of my

life," she says. "I've met so many people and wherever I go they are always friendly. I'm enthusiastic by nature and I always try to use my resources creatively, trying not to repeat myself. Even in creating new dishes, I always try to add something new. For example, with the *imbutini*, I also made a "Croccante" dessert.

Now the goal is to find contacts with pasta makers interested in producing her shape. "Do you know how many people write, asking me to send them packages? But, currently, shipping at a reasonable cost is very difficult." But with her "abundance of ideas", Flavia knows that much still remains to be written in the story of the *imbutini*. And that the awards she has won (Premio Grana Padano), the articles that have appeared and the events in which she has taken part (FICO, Cibò So Good and the upcoming Cibus) are just the beginning.



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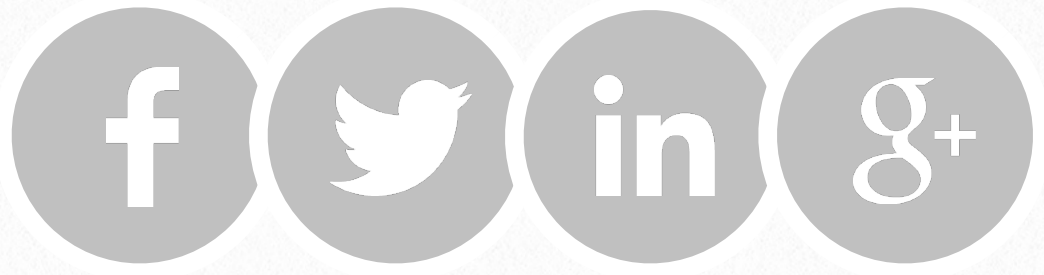


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Piemonte Nord



3



# Durum wheat, 16% less harvest in Italy due to scorching heat and drought

Pastaria Centre for Economic Research



Analysts are forecasting a double-digit loss in the durum wheat harvest in Italy.

A loss in double figures was not on the radar of analysts, who were not expecting such a disastrous season weather-wise. And yet, given the effects of the desert heat and peaks of aridity in the soil due to the most severe drought in Europe in the last century (according to the EU's Copernicus Earth observation program), the figure is hardly surprising. But it could have been worse, experts say, with that 16% shortfall in durum wheat production in Italy – estimated by Ismea (Institute for Studies, Research and Information on the Agricultural Market) in the wake of a post-threshing inspection – that might even have gone as high as – 20%.

Behind the forecast of 3.4 million tonnes formulated by the Institute supervised by the Ministry of Agriculture, there is a minimal loss of surface area sown (1.4 percent, according to the ISTAT survey on sowing plans) and a considerable reduction in yield, estimated this year at an average of 2.8 tonnes per hectare, the worst result in the last five years. The loss of productivity in the seasons, due to the combined effect of record heat, which has impaired the development of the ears of wheat and diminished specific weights, and water stress due to the prolonged absence of rainfall in mostly non-irrigated areas, has negatively affected the 2022 harvests in almost all dedicated areas. Apulia suffered the worst result: 25% less production than last year's season. Heat and drought also produced major effects in Sicily (-15% harvest) and Basilicata (-10%), with equally significant losses in Marche (-20%) and Emilia-Romagna – Northern Italy's specialised district – where approx. 15% of potential was lost this year.

In terms of quality – explains Ismea – the grain is of a good standard and has a satisfactory protein content of between 11% and 13% of dry matter.

The wider gap between the level of use and effective domestic availability will lead Italy to rely more on imports, which this year will be mainly Canadian brands. In contrast, there will not be sufficient supplies of French grains, with France – another important supply basin – suffering the dry weather even more than Italy. In this regard, Agreste, the statistics board of

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the Ministry of Agriculture in Paris, places this year's harvest, for both soft and durum wheat, among the seven worst harvests since 2000/01 and at the lowest level in five years.

With regard to durum wheat in particular, the estimate is only 1.3 million tonnes, a volume 16.6% lower than last year's figure and more than 21% lower than the 2017-2021 average.

For Italmopa (Association of Italian Millers), which is expecting a harvest of 3.5 million tonnes in Italy, the lack of raw material and empty warehouses, with stocks falling to exceptionally low levels, will lead to an inevitable increase in imports.

As for the rest of the world, the production season in North Africa and Turkey reaped very poor results. While in North America, after the disastrous statements of 2021, the indications updated as far as August confirm a strong recovery in production, thanks also to an increase in investments.

StatCan, the Canadian Bureau of Statistics, predicts a durum wheat harvest of almost 6.3 million tonnes, a 98% improvement on 2021 and 7% above the average of the last five years.

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Good availability, although not full potential, given the low stocks, suggests an estimate of Canadian grain exports in the 2022/23 trade year at a level of 5 million tonnes, 85% more than the last season.

Globally, the International Grains Council estimates a production of 32.9 million tonnes, recovering year-on-year (+7%), but below the five-year historical average (-4%). Including stocks, the world supply is expected to reach 39.1 million tonnes, compared to a consumption of 33.6 million, an increase of 3%. A strong

upswing in trade on international markets is also expected, with the prospect of a 36% increase in exports, to 8.7 million tonnes, driven by greater European demand and strong demand pressure from Morocco and Turkey.

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# 4



## Commodity price observatory 3/2022

Pastaria Centre for Economic Research



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



With the autumn recovery, following a turbulent summer break, the Oil & Gas aggregate is still markedly inflationary. A condition in which fears of a second round of effects on consumer prices is becoming increasingly more pronounced, reinforcing expectations of a recession in Europe, where the energy deficit is likely to lead to the introduction this winter of an austerity policy, already announced by the European Commission.

In this highly critical environment, exacerbated by Moscow's reaction to the proposal made by the G7 and endorsed by the EU to cap Russian oil prices, the markets have totally lost their bearings. It is difficult under current conditions to make forecasts which, if based on fundamental elements alone, might lead to assessments that would easily be contradicted by the facts.

In a nutshell, traditional metrics are not sufficient for making forecasts, now that gas prices, which broke another record in August on the Dutch TTF market – now hostage to speculation – have reached soaring heights, rebounding after the Kremlin announced the indefinite closure of the North Stream 1 pipeline that brings gas to Europe.

Too much uncertainty, against a vacillating geopolitical and geo-economic backdrop, that compels analysts to consider every possible scenario, with prospects for maintaining income and consumption levels progressively worsening.

August trajectories for food commodity prices remain moderately disinflationary, at least in the stages upstream of consumption, i.e. the agricultural and industrial ones. The Food Price Index, the monthly indicator drawn up by the FAO, that summarises the dynamics of food commodity prices, closed on July with a drop of 1.9%, the fifth in a series that began in April. A backward leap that has reduced, but not eliminated, the price gap with last year, a gap that remains positive but in single figures and just a little under 8% percent.

It should be noted that the negative dynamics in August affected all the sub-indices that make up the leading indicator from the Food Organisation of the United Nations. Drops ranging from -1.4% in cereals to -3.3% in vegetable oils.

A fairly obvious sign that this summer's climatic difficulties – characterised by exceptionally high temperatures and prolonged dry weather – did not have that



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**PRICES AND TRENDS OF CERTAIN FOOD RAW MATERIALS (AUGUST 2022)**

	Price (€/ton)	Monthly variation	Annual variation	Forecast
<b>National fine common wheat</b>	363.5	2%	48.6%	▼
<b>Fine durum wheat from North Italy</b>	504.5	-0.2%	27.7%	▼
<b>00 type common wheat flour</b>	750	0%	49.5%	▼
<b>Semolina above min. leg. req.</b>	777.5	-1.1%	37.5%	▼
<b>Eggs M</b>	16.5	1.9%	28.9%	▲
<b>Pork hams for Prosciutto 12 kg and over</b>	4.87	4.3%	28.5%	▲
<b>Beef – veal meat half-carcass, prime quality</b>	6.33	0%	19.7%	▲
<b>Raw milk</b>	64.69	-0.7%	65.1%	=
<b>Centrifuged butter</b>	6.91	-2%	76.7%	=
<b>Grana Padano aged for 9 months or more</b>	8.9	0%	25.7%	=
<b>Extra virgin olive oil</b>	4.88	11.7%	12.7%	▲

*Source: Centro Studi Economici Pastaria elaboration based on various data sources. Grain, flours and semolina: Granaria, Bologna; Eggs: CCIAA, Forlì; Pork and beef: Commodity Exchange, Modena; Milk, butter and Grana Padano: Commodity Market, Milan; Olive oil: CCIAA, Bari.*



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FAO Food Price Index	Price (2014-2016=100)	Monthly variation	Annual variation	Forecast
	138	-1.9%	7.8%	▼
Hard Red Winter US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	382.86	0.1%	18%	▼
Mais, U.S. No. 2 Yellow FOB US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	289.84	-10.3%	12.9%	▼

*Fao Food Price Index, Hard Red Winter, Mais: August 2022*

predictable sustaining effect on listings, together with production outcomes that were more disappointing than initial expectations, at least in Europe.

The fall in the FAO index is the acid test for the indisputable concerns about the fate of the global economy, which is heading towards a recessionary turn that operators think will cripple consumption. A view shared by merchant banks and hedge funds, which were very active on soft commodities throughout March, but are now cautious in retreat en masse.

As for cereals, the gradual resumption of export activities at the Black Sea ports has eased tension over prices. As regards durum wheat in particular, confirmation of a return to normal production in Canada reduced the imbalance between supply and demand that had characterised the whole of the last season. Soft wheat rather lost its impetus after the confirmation of

generous harvests in North America and Russia, the latter having extremely significant exportation potential in the 2022/23 season.

Some difficulties persist, however, as regards livestock production, with inevitable implications for meat and dairy prices, but the prospect of a slowdown in consumption dictated by the worldwide recession scenario has dampened listings also in this case at the industrial stage, although in the certainty of a difficult situation on livestock farms due to the implications on farm costs of high feed prices.

Inflation has significantly affected almost all items of cost in the milk supply chain. In the first place, as mentioned, the maxi increase in the feed ration, in a context exacerbated by the dry weather, which has reduced both cereal harvests and milk production. A phenomenon that has



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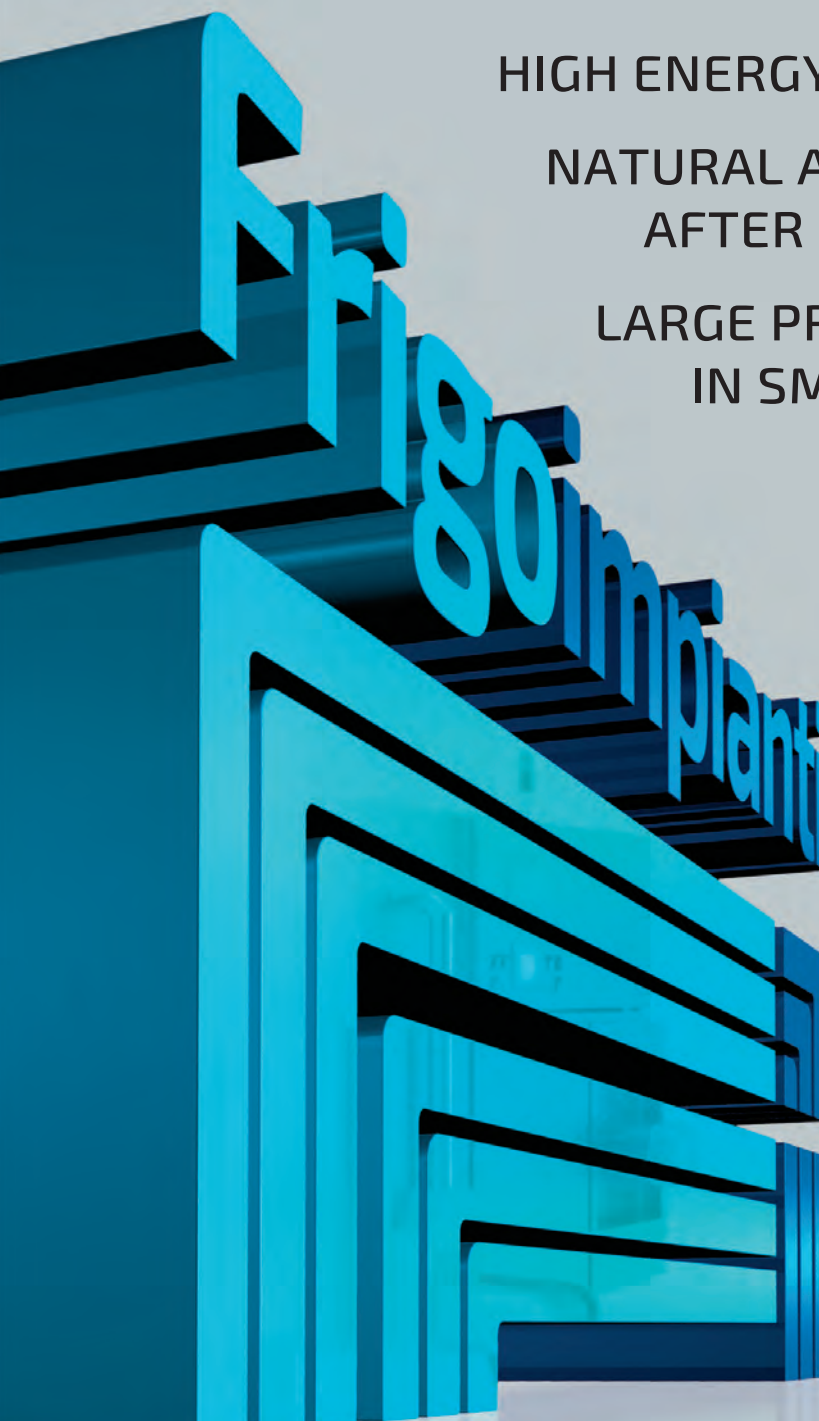
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produced a knock-on effect, leading to a increase of nearly 50% in the price of raw farmgate milk.

For all agri-food commodities, higher prices have been observed in Italy compared to a year ago, particularly double-figure increases, with possible new repercussions downstream of the production and distribution chain. In Italy, based on ISTAT data, inflation in the shopping cart (Food & Beverage) has risen well above the 10% mark, exceeding the cost of living by nearly two points, at +8.4%, a level not seen since December 1985.

A further devaluation of the euro – already worth less than the dollar in the Euro-US Dollar exchange ratio – may take place. A possibility that would have negative implications on the cost of living, by increasing the prices of imported products. The other danger lies in the further cutbacks in monetary policy, with central banks tightening their belts, a phenomenon already widely experienced in the US and the UK, which would worsen the debt crisis in Italy, also dangerously raising the financial costs borne by businesses.

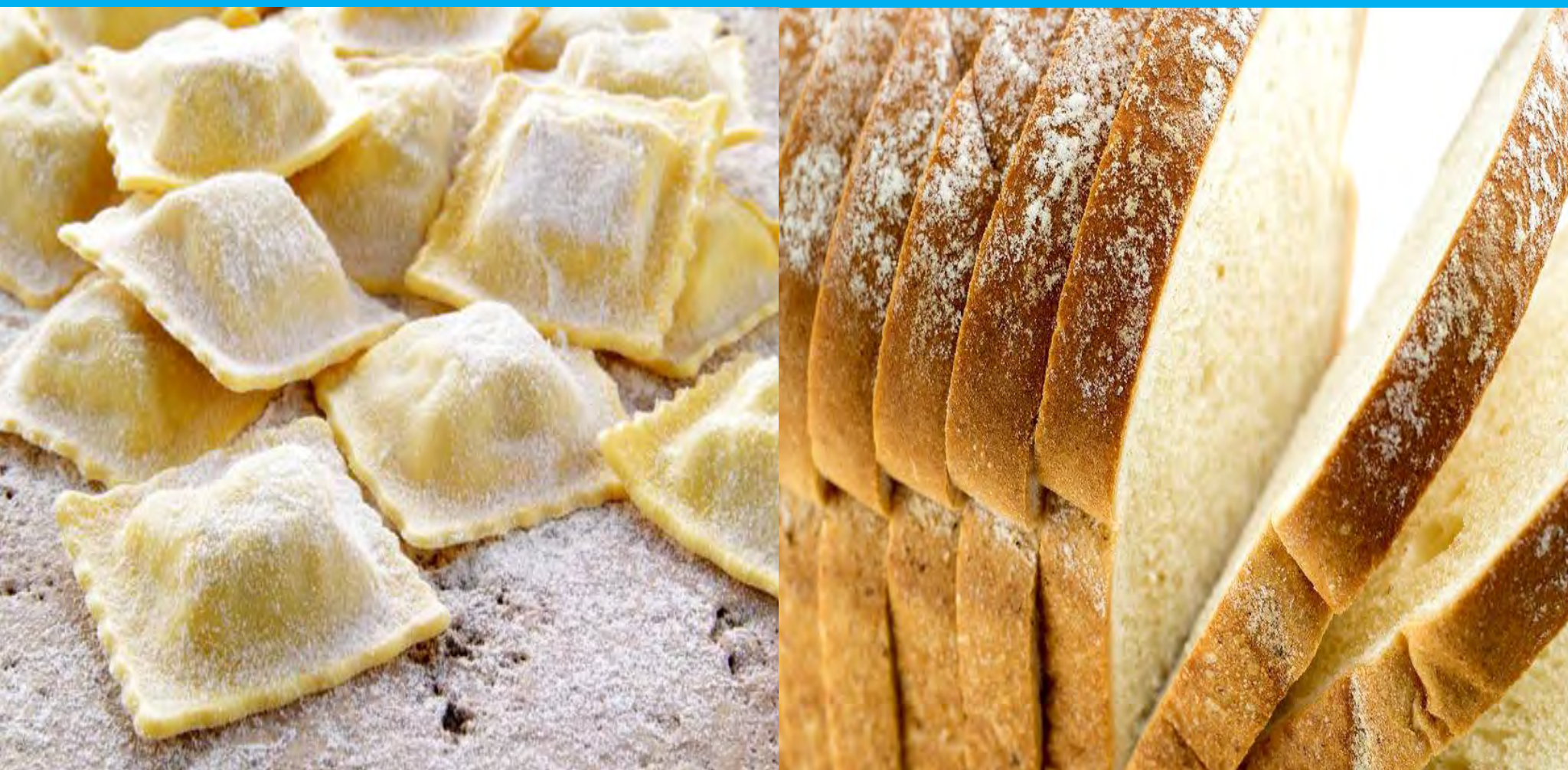
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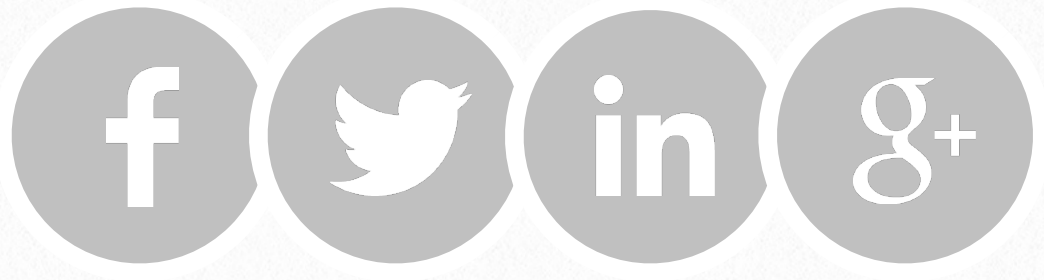


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5



# A pasta factory is reborn in Afghanistan with the help of She Works for Peace and Girolomoni

Press release



**Maria Girolomoni: “We ask other companies to join us. Without additional funds, the existence of the pasta factory will already be at-risk in the coming months.”**

Supporting the courage of a group of Afghan women, making a tangible contribution to rebuilding the social and economic fabric of a community. This is the impulse behind the close partnership between the She Works for Peace association and the Girolomoni agricultural cooperative to aid in the rebirth of a pasta factory run by women in the north of Afghanistan. A project born of the initiative of Selene Biffi, social entrepreneur who has been active in Afghanistan since 2009 and is the founder of She Works for Peace.

At its heart is the story of Sima who, in 2018, launched the company and expanded the business, involving nine women in production, workers with difficult pasts and who, in many cases, are the only source of income in large families. This experience came to a halt with the arrival of the Taliban in August 2021. But Sima did not give up.

Selene Biffi tells us: “I met Sima last March in Kabul, she was selling scarves and traditional clothing. But my dream, she told me, is to reopen my pasta factory. It all started from there. I was looking for a company that could not only help, but which had a special sensibility. The idea came to me thinking about the fact that at home we eat Girolomoni pasta, a company that stands out not only for the quality of its product, but the entire philosophy behind it, from its relationship with farmers to the use of traditional grains, as well as environmental sustainability. We strongly believe,” Selene adds, “that this project can show a different way of cooperating, a way in which social and economic reconstruction of families and communities necessarily involves participation, training and female employment, thanks to the support of responsible companies.” And so, joining the work done by Selene and She Works for Peace for the rebirth of the pasta factory, is the support from Girolomoni. “I share three things with the women in Sima’s pasta factory,” says Maria Girolomoni, head of Communications and Public Relations of the Cooperative, “pasta, work and family. I often think it is very tiring doing everything, but when I heard the stories of these women, they reminded me of the priorities in life, and I felt close to them. Together with Daniela Bellini, the person responsible for quality in the Cooperative for many years now, we decided



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to support them and we hope to soon engage other partners from companies in our supply chain and beyond, to provide continuity and allow Sima to provide hope by giving work to women in that difficult country.”

The pasta factory has already reopened and eleven women have begun working there again, including Sima. Girolomoni has made available the resources needed to cover the initial months of work, as Daniela Bellini of the Cooperative explains: “These funds are used for employee salaries, purchasing products, electricity, transport of materials, equipment to

produce and package the pasta and a first aid kit. Help that guarantees the survival of the pasta factory until next August. We hope that many will respond to our appeal to continue to stand beside these women who are determined to move ahead, despite a context that deprives them of their fundamental rights.”

## **The pasta factory**

The pasta factory created by Sima was a dynamic company with a staff of eleven (nine women in production and two men in distribution and logistics) and contracts with government ministries, NGOs and



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From the left, Daniela Bellini and Maria Girolomoni of the Girolomoni cooperative

local hospitals for the sale of their pasta. In 2018, the company won the “Bibi Khadija Annual Award” (an award of the women’s Chamber of Commerce dedicated to female entrepreneurs whose work has acknowledged impact in Afghanistan), in recognition of the quality of their product and its potential.

With the arrival of the Taliban in August 2021 and the restrictions placed on women, everything changed. Their materials were requisitioned, the women sent home and the pasta factory forced to close. “All I was able to take with me were

the crank machines to roll out the pasta sheets,” Sima noted bitterly.

The close partnership between She Works for Peace and the Girolomoni Cooperative made it possible to reopen the business. Today, eleven women have begun working at the pasta factory again, including Sima. Among them, is a women who, before the Taliban regime, was a teacher, another was a cook in a restaurant and another was a university student. All from large families— between two and six children per family— and, in some cases, widows or with husbands who are ill, at the moment, these



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Selene Biffi, promoter of the initiative and founder of She Works for Peace

women are the sole wage earners to support their families. So, for all of them, the pasta factory is the only way to provide for their families at this very complicated time in their country.

In the near future, the pasta factory would like to expand its production and make a contribution to local farming, not only through the purchase of local raw materials, but also working directly with farmers to improve the quality of the grains and flours. The creation of additional

employment opportunities for women is another aspect the business would like to focus on soon. For the future, there is also the goal of expanding its market outside of Afghanistan by selling its products in other countries in Central Asia.



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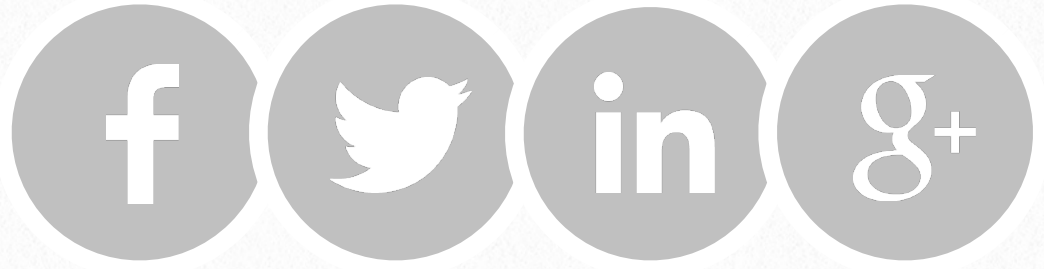
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# 6



## Coop Report 2022, Italy's spending review has spared food (so far)

Pastaria Centre for  
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Too much disruption. The pandemic, war, climate change, hyperinflation. Not least on the scale of disasters is an unprecedented energy shock that compels a spending review on all fronts in order to be able to face a winter that promises to be burdensome and rough on Italian families and businesses.

The scenario outlined by the preview of the Coop Report 2022 is complex, with critical issues of exceptional historical magnitude and a possible downward spiral that does not exclude, according to the Bank of Italy, a return to a recessionary GDP in 2023, based on the prospect of a downswing of 2%.

The perfect storm, also iconised on the cover of the Coop Report, starts with the “more prosaic but critical dilemma of the utility bill”, analysts note, even although Italians seem to be more preoccupied at the moment with the effects of climate change, concern for the environment seeming to affect moods and purchasing behaviour more than any other economic and social factors.

The new austerity is the result of incidental issues and displays the face of a more vulnerable country, with an impoverished middle class on the one hand and – in direct contrast – the unbridled growth of the luxury market on the other. Italy with a dual identity, alert and guarded, which is nonetheless unwilling to give up its customs and its food consumption, notwithstanding the rising prices and the dramatic shrinking of purchasing power.

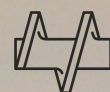
Today – the Report explains – the Italian market displays an inflationary dynamic in processed food products that is now in double figures, but still lags behind other European countries (the national average being +10% compared with Germany’s +13.7% and Spain’s +13.5%).

Despite the price pressure, sales volumes have demonstrated resilience, making 7.8% progress in the first half of 2022 compared to 2019, the year before the Coronavirus emergency. A comeback that was achieved in the scorching summer sun and was nurtured by the return of foreign tourism and the ability of modern distribution to impose itself on specialist retailers.



FOOD TECHNOLOGIES

*Fresh filled or non-filled pasta, dry, special, raw flour, pre-cooked, pasteurized, frozen pasta, gluten-free or not, using or not special flours: there are no limits to the customization of your industrial plant of pasta production.*



## PASTA MACHINERY



FRESH PASTA



PRE-COOKED PASTA



DRY PASTA



GNOCCHI

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TECHNOLOGIES  
INGREDIENTS  
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FOR PASTA  
MANUFACTURERS

But the picture is changing and not for the better. The Italian market is currently the only one to maintain a positive trend in sales volumes in the food sector, with a year-on-year rise of 0.5%, compared to a drop of 5.4% in the United Kingdom and the – still negative – results of 3.7% in Germany, 2.3% in France and 1.3% in Spain.

A difference which, like the inflationary lag mentioned above, seems to point towards an imminent trend reversal.

The reassuring aspect for now is that food appears to be “exempt” from the rise affecting other household bills – which is changing purchasing behaviour – for obvious reasons, but also because of a remix in consumer choices, leading to the sacrificing of certain other items.

Even in the face of this inauspicious scenario, the defensive mechanism of the Italian spending review – which has, surprisingly, also come into play in other industries – has, for the first time in decades, spared food.

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of protection

The packaging of a food product is essential to preserve its excellence.

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According to a survey conducted for the preview of the Coop Report, despite rising prices 24.5 million Italians plan to decrease the quantity – but not the quality – in their shopping carts in the months to come. The cooking time experienced during the first lockdown is also making a comeback. So more time is dedicated to preparing meals, with a predictable revival of basic ingredients and foods that require more effort at the stove, such as the cooking of first courses with pasta or rice. There does not appear to be the downgrading in purchases that was the primary response to difficulties during previous economic crises, particularly during the Great Depression period of 2008-2009.

Of course if the situation worsens, Italians may again resort to expenditure restraint policies, even if this entails the odd sacrifice in terms of quality. But only if the crisis should worsen, a circumstance that would initially involve sacrificing the pricier layers of consumer choices, starting with ready meals and organic foods, which are already subject to inflation. The future doesn't look so bright for brand leaders too, sales of which have already fallen compared to pre-pandemic levels, with a market share that has dropped to 13.1% from 14.9% in 2009. In contrast, private label products are on the up, with a share

now close to 30%, 2 percentage points higher than in 2019.

The other side of the coin concerns the large-scale distribution scenario – perhaps the most critical of all. A year-on-year increase of 15% in the prices of foods sold by industry to large-scale retail chains has been estimated to date, compared to a 9% average increase in retail prices.

The most inflationary products are seed oils, which have increased in price by more than 40%, and olive oils (+33.1%). But tensions extend to other packaged consumer goods, starting with pasta (+30.9%) and flour (+25.4%).

With regard to formats, large-scale retail outlets are advancing at a moderate pace at the expense of neighbourhood stores. Discount stores are springing up at a rapidly increasing rate while hypermarkets are on the decline.

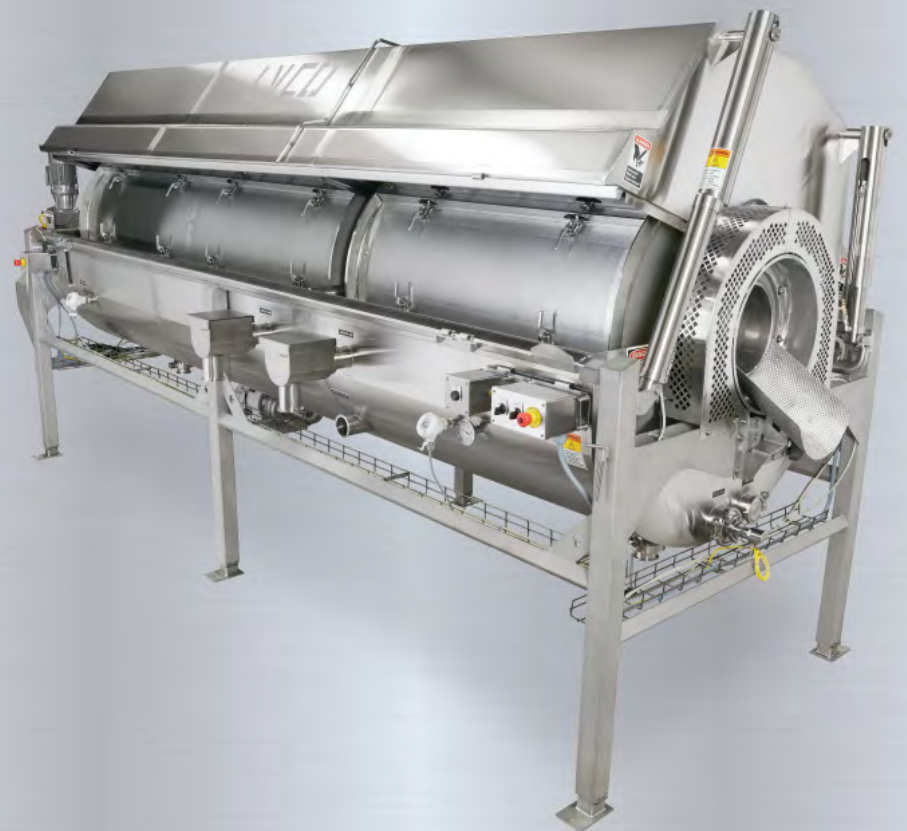
E-groceries lost momentum after the lockdown surge, remaining at quite a distance from the market shares of other European countries. From the current 2.9% – the analysis concludes – online sales could rise to 6% in 2030, compared with projections of around 19% (now 12%) in the UK market and 16% (8.6%) in France.

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- Higher productivity
- Zero losses from clumping
- 5-10% higher yield compared to belt systems
- Common CIP system
- Zero labor to run one main drive



HYDRO-FLOW®  
AGITATION  
KEEPS SPAGHETTI  
SUSPENDED  
AND MOVING

### 36 INCH COOKER-COOLER PASTA COOK TIMES

PASTA COOK TIME / MINUTE	8	9	10	11	12	13	14	15
Pasta Short Kg-HR	1,065	955	840	770	680	640	590	545
Pasta Long Kg-HR	660	590	525	475	430	410	365	340

### SUGGESTED APPLICATIONS



PASTA

RICE

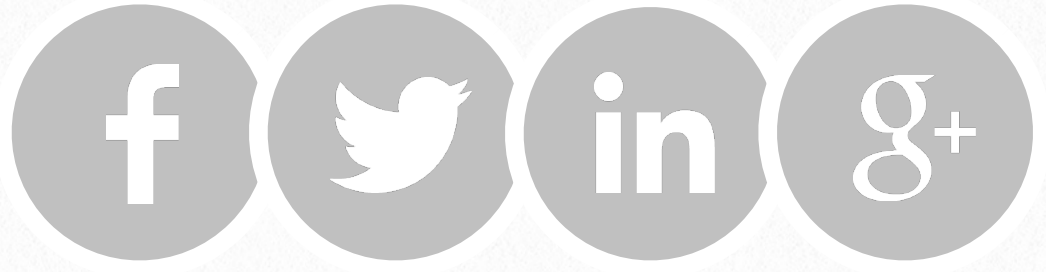
VEGETABLES

DRYBEANS





# 7



## Grand celebration at Molino Dallagiovanna for its 190<sup>th</sup> anniversary

Press release



From the left, Paolo, Sergio, Pier Luigi, Stefania, Renza and Sabrina Dallagiovanna

The historic mill at Gragnano Trebbiense celebrated 190 years of business activity with an event that included the participation of illustrious names in “white art”.

Saturday, 10 September at Gragnano Trebbiense (PC) a very special anniversary was celebrated.

Molino Dallagiovanna commemorated 190 years of business activity with a major event and a plethora of illustrious guests who met at its Madonna del Pilastro headquarters.

For Molino Dallagiovanna, it was an opportunity to relive its history from 1832 and to thank all those who, over the years, have contributed to its growth and success throughout the world. During the festivities, employees, associates, customers, distributors, and the numerous leading lights in the “white art” sector present were honoured.

Among these were Iginio Massari, Achille Zoia, Leonardo Di Carlo, Luigi Biasetto, Denis Dianin, Claudio Gatti and world champions from the world of pastry-making.

The entire Dallagiovanna family was present to welcome its guests, with the fifth generation represented by cousins Pier Luigi and Sergio, and the sixth with Paolo, Sabrina, Renza and Stefania. Alongside them on the stage of the 190th anniversary event were renowned masters of ceremonies Andrea Mainardi and Daniele Persegani, chefs and TV celebrities, as well as Giacomo Ciccio Valenti, the popular host of RDS 100% Grandi Successi.

The celebrations also included the national finals of the first Pizza Bit Competition conceived by Molino Dallagiovanna for professional pizza-makers, in collaboration with Gambero Rosso. Named Pizza Ambassador 2023 – winning over eight other contestants from throughout Italy – was 27-year-old Andrea Clementi from the Punto Pizza pizzeria in Venice, who presented his “Assaporando settembre” (A Taste of September) pizza featuring pigeon breast. For all of 2023, he will be the official Molino representative for the pizza sector in Italy and around the world.

The day’s programme also included a tour of the Piacenza countryside, from Madonna del Pilastro to Castello di Rivalta, in 500 classic cars, as well as a tour of the mill.

# 190



— *anni* —

190 years that Dallagiovanna **FAMILY** pass down,  
from generation to generation, the **CRAFT**, the **ART**  
and the **PASSION** in order to make the  
**BEST QUALITY FLOURS.**

**1832 - 2022**





## The Mill

The company was founded by Ernesta, doyenne of the family, in 1832 in Gragnano Trebbiense in the province of Piacenza. Its primary activity was selling cereals collected from farmers using a barà, an old horse-drawn gig, to be delivered for grinding in other mills in the area. It was only in 1870 that the first stone mill was purchased, fed by the waters of Rio Vescovo, the property of the House of Visconti di Modrone. However, the mill had to pay a tithe to the Church, which was only redeemed in 1926.

The year which marked the turning point for Molino was 1949 when Guido, Renzo and Vittorio Dallagiovanna took over the

reins of the company. With their strong entrepreneurial spirit, on the site where the grain silos stand today, they built the first roller mill, followed by a second in 1953. Their names still resound in Molino and are also present in the company's name (Molino Dallagiovanna G.R.V.).

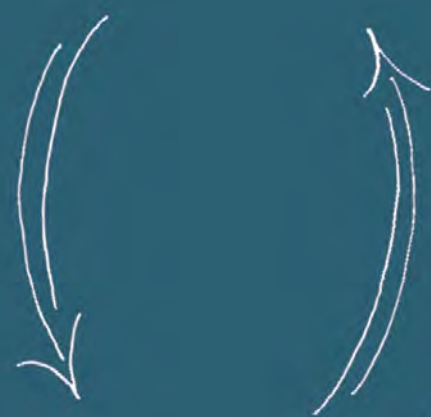
A story that continues to this day, across nearly two hundred years of major transformations and in which the strong points of the company are the careful selection of the best grains to create balanced and consistent mixtures, the washing of the grain (they are the only major mill in Italy to still perform this fundamental step for optimal cleanliness and more homogeneous moistening of the

FROM THE LAND OF WHEAT  
· SINCE ·  
**PASTA  
ARGENTINA**  
· 1860 ·

*La mejor Pasta de  
Sudamérica*



VIENE DE  
NUESTRO TRIGO



SALE DE  
NUESTRO CORAZÓN



grain), the slow, gentle grinding to respect the organoleptic characteristics of the grain, and a solid commitment to continuous improvement, renewal and research and development.

The company offers over 400 flours, from the traditional ones for bread, pizza, pasta and bakery goods, to gluten- and lactose-free lines. Among its newest offerings are: leDivine, a line of flour made from Italian wheat; Uniqua, a line of multi-use flour that brings together flavour and wellness; the Miscela Oltregrano, designed to make doughs that are easy-to-handle, unique and with high-performance during baking; and, finally, custom-made flours, created and balanced to meet the needs of each client. In Italy, Molino Dallagiovanna is the leader in the baked goods sector with its leDolcissime line, comprised of seven types: Frolla 130, Frolla, Sfoglia, Brioche, Brioche Soft, Panettone and Panettone Z. This last type, together with Brioche Soft, was developed with the major contribution of master pastry chef and yeast expert Achille Zoia. Completing the leDolcissime line is also Rinfresco del Lievito Madre, the flour developed thanks to the collaboration of master pastry chef Iginio Massari. Leading the company today is the fifth generation—with cousins Pier Luigi and Sergio Dallagiovanna—and the sixth with



Paolo, Sabrina, Renza and Stefania who work as a team.

Over nearly two hundred years, Molino has evolved and grown into one of the most productive companies in the milling sector, exporting to over sixty countries around the world the values and excellence of Italian food products.

BRAZILIAN  
BISCUITS, PASTA  
AND INDUSTRIALIZED  
BREADS & CAKES  
ASSOCIATION

**TOGETHER WE  
ARE STRONGER**

We represents more than **40 billion** in sales per year, **3.5 million** tons of products consumed and **158k tons** of brazilian Biscuits, Pasta and Industrialized Breads & Cakes around the World.



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

**BRAZIL IS IN THE TOP 10  
IN THE BAKERY INDUSTRY**

3<sup>rd</sup> place for **biscuits** in the world;  
3<sup>rd</sup> place in the dried **pasta** in the world;  
9<sup>th</sup> package **bread** in the world.

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