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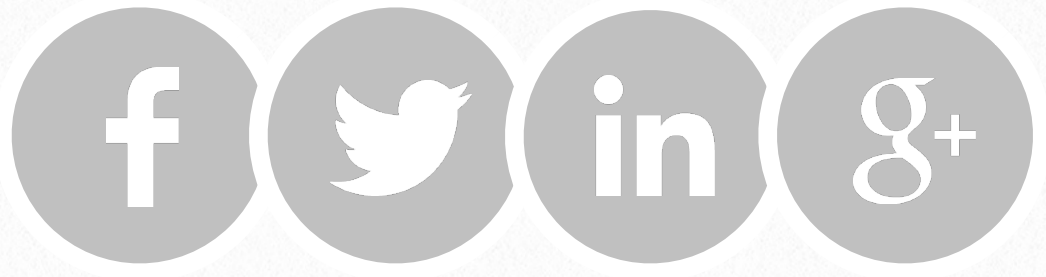
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1



What wheat-pasta supply chain figures tell us

Pastaria Centre for Economic Research



A turnover of €2 billion, estimated with reference to basic prices, corresponding to 39% of GSP (gross saleable production) for the cereal sector and 6% of total crops. According to ISTAT data, the above figures represent the value of Italian durum wheat production; additionally, the milling industry generated approximately €2.2 billion (1.4% of the total turnover for the agrifood industry), while a turnover of €5.5 billion was attributed to pasta manufacturers (3.6% of the total).

Figures for the sector were recently updated by ISMEA (Institute for Studies, Research and Information on the Agricultural Market), which also drew on data from Italmopa, Unione Italiana Food and Federalimentare in preparing its estimates.

At a basic level, the production structure is made up of over 136,000 farms dedicated to growing durum wheat, mainly concentrated in the Southern Italian regions. Enterprises that supply 102 mills, with a total processing capacity of 21,000 tonnes/day (24 hours). The second processing stage, further downstream, involves 110 industrial pasta factories that produce over 3.5 million tonnes of pasta annually, by processing just under 3.9 million tonnes of semolina.

Upstream, the farms supply the mills (intermediate users) with a little over 4

million tonnes of domestic grain, obtained from a surface area of approximately 1.2 million hectares. In addition to this quantity of domestic produce, approximately 2.3 million tonnes of wheat is imported; this volume exceeded 3 million in 2020 on an exceptional basis.

Sicily is recorded as having the most mills, at 37, but these account for a very low proportion of the national production potential, due to the prevalence of small-scale facilities on the island. The 110 industrial pasta factories (end users), on the other hand, are distributed equally between the Centre-North and the South and Islands. In this regard, a growing production trend has been observed over the past decade, encouraged by positive developments in terms of overseas sales, with more than half of the national supply now destined for export, a trend that has become stable. Dry pasta accounts for approximately 95% of total production volume, compared to 5% attributable to the fresh pasta segment.

The study indicates that the profitability of durum wheat growing is subject to significant volatility. From mid-2016 to 2018, farms operating in the sector saw margins fall, on average, due to a downward price trend and simultaneous increase in production costs. On the contrary, a net improvement in revenue



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was seen from the end of 2019, due to positive dynamics in terms of prices and farming costs rising at a slower rate than earnings.

As regards the domestic market, per capita consumption of traditional dry semolina pasta has fallen considerably, from approximately 26 kg/year in 2012 to less than 23 kg in 2021 (-11%). Changes in the dietary habits and lifestyles of Italians have been deciding factors in this phenomenon. Most recent evidence (Nielsen Market Track data), updated to include the first three quarters of 2022, indicates that volumes in the pasta sector are substantially holding steady (-0.5%), albeit in the context of an increase of approximately 15% in monetary terms, with unit prices of semolina pasta jumping, on average, to €1.73/kg, compared to €1.42 in January-September 2021. As regards quantities sold, detailed data reveal a completely level trend for traditional semolina pasta products, with filled pasta down 2.2% and egg pasta falling by 5%. In monetary terms, semolina recorded an increase of 22%, compared to a 3.5% increase for filled pasta and 4.4% for egg pasta.

Estimates suggest that national consumption of pasta in Italy is currently hovering around 1.35 million tonnes, while exports exceeded 2 million tonnes.

The study also provides an overview of the global situation, which confirms Canada's position at the top of the leader board for durum wheat production and exporting, with the country holding 15% and approximately 60%, respectively, of the global share. Remaining in North America, the USA accounts for 5% of supply and just under 10% of total exports. A similar picture for Mexico as regards production (5-6%), with the country ranking among the Top 5 global exporters of durum wheat, but with approximately 4% of the share. Turkey and Algeria, respectively, account for an average of 10% and 6% of harvests worldwide, but the two countries are also major consumers and net importers of the ingredient, mainly used for cous cous production. The climate trend has led to structural issues at these latitudes, involving strong fluctuations of production yields, with consequent variability of supply. In some years, this phenomenon has translated into strong pressure on global demand from the two countries, with consequences in terms of inflation, mainly affecting major users of the ingredient such as Italy.

Albeit with an inferior "calibre" in global terms, Kazakhstan contributes approximately 2% of global production, but is somewhat significant for Italy's wheat suppliers. The situation as regards

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Table 1 WHEAT-PASTA SUPPLY CHAIN FIGURES IN ITALY

STRUCTURE	Unit of measure	2019	2020	2021
Durum wheat farms	(n)	-	136,043	-
Surface	(000 ha)	1,224	1,210	1,229
Milling industry enterprises (durum wheat)	(n)	-	-	102
Companies of pasta industry	(n)	112	112	110
SUPPLY	Unit of measure	2019	2020	2021
Production of durum wheat	(000 t)	3,963	3,997	4,137
Production of durum wheat semolinas	(000 t)	3,858	4,208	3,880
Durum wheat milling industry turnover	(€mln)	1,716	1,989	2,195
Production of pasta	(000 t)	3,506	3,900	3,540
Turnover pasta industry	(€mln)	5,035	5,682	5,552
EXCHANGES WITH OTHER COUNTRIES	Unit of measure	2019	2020	2021
IMPORT				
Durum wheat	(€mln)	633	826	743
EXPORT				
Semolina Pasta	(€mln)	2,075	2,508	2,380
DEMAND	Unit of measure	2019	2020	2021
Consumption of semolina pasta	(000 t)	1,401	1,459	1,352
Per capita consumption of pasta	(kg/year)	23	23.5	22.9

Source: ISMEA elaboration based on ISTAT, Italmopa and Unione Italiana Food data

Australian wheat is similar, though Canberra accounts for barely 1% of the global harvest. Finally, as regards

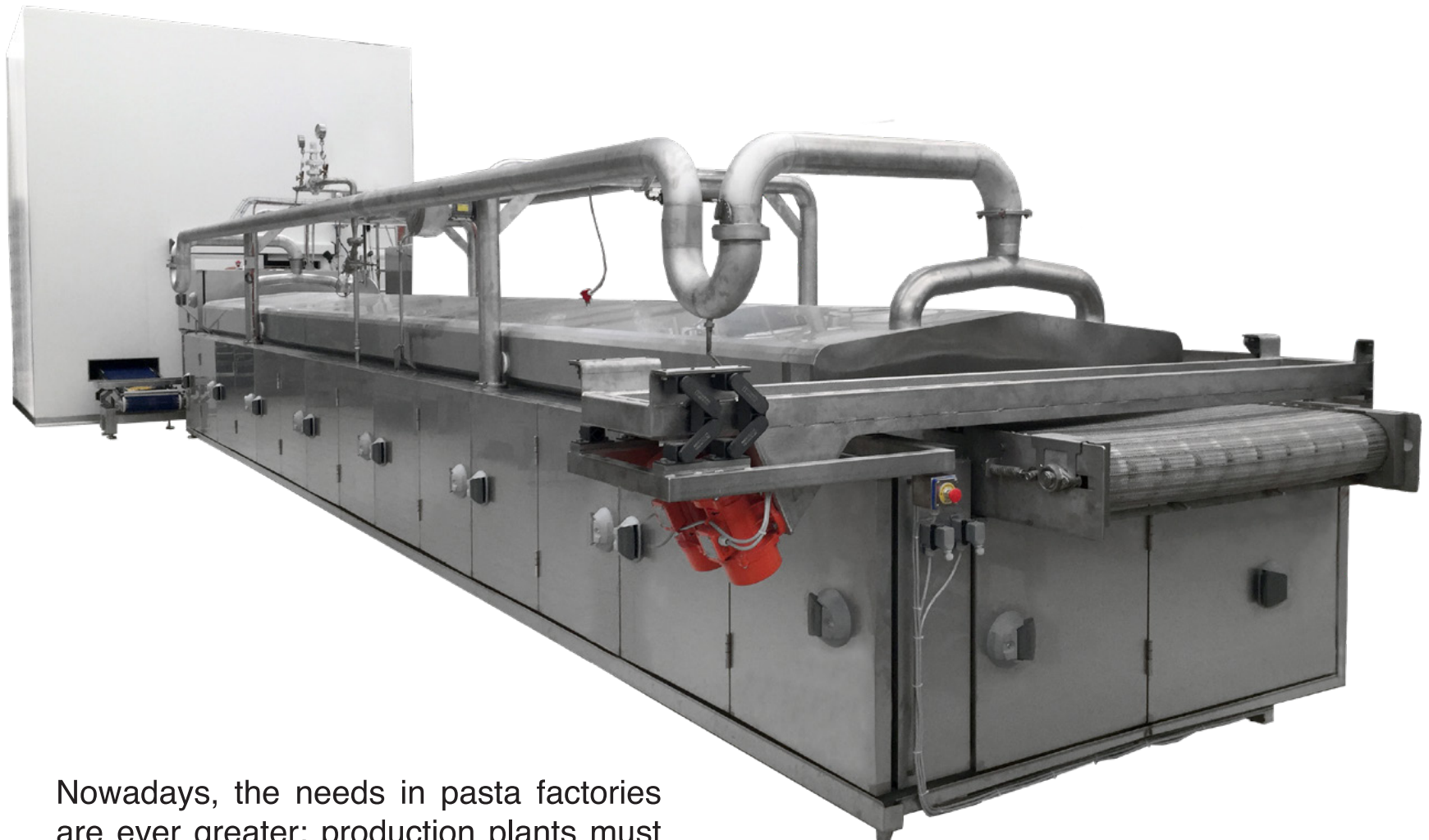
countries in the European Union, which produce an average of 8 million tonnes of durum wheat per year, corresponding to

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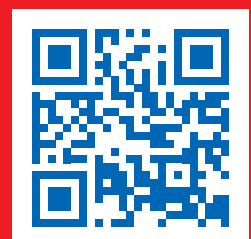
Nowadays, the needs in pasta factories are ever greater: production plants must be more compact, easily washable and highly efficient.

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23% of the total, Italy stands out as the leading producer in the EU and the second, behind Ottawa, on a global scale. Statistics attribute 12% of overall output and 50% of the continent's production to Italy. For a long time, the latter was also the world's leading importer, but was overtaken by Egypt in 2020 and China in 2021.

According to Anacer (Italian Cereal Industry Association), Italy imported just under 1.4 million tonnes of durum wheat in

the first 10 months of 2022, compared to 1.9 million in January-October 2021 (-27%). The significant reduction in volumes was coupled – due to known inflationary impacts that pushed durum wheat prices to record highs last year – with increased expenditure in monetary terms, with spending on imports exceeding €685 million, representing an increase of over 18% year on year.

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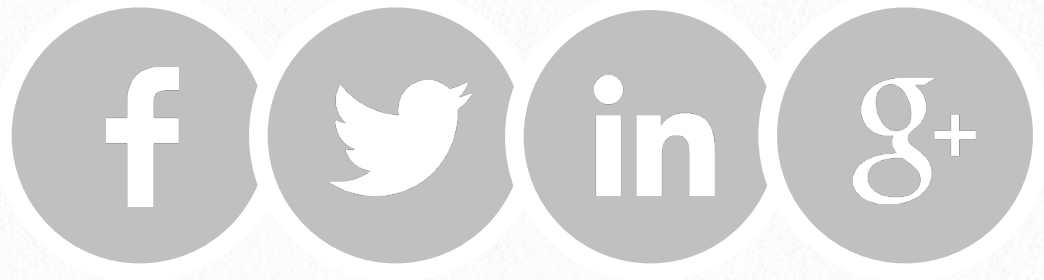
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2



**Amaranth, hemp,
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top-quality pasta meets new tastes



Cuneo-based Pasta Natura exports all over the world, proving that gluten-free can capture the palates of non-coeliacs too.

In 2016, Fulvia Ruata, her husband Nicholas L'Abbate and father-in-law Vincenzo L'Abbate, realised their dream: to produce gluten-free pasta. But this is not “your average pasta”. It is a special food, well positioned to immediately stand out in the market for a variety of reasons.

Foremost among these is that the product is made exclusively from select pulses and grains, most of which are grown on the company's own land, situated in the plain between Saluzzo and Savigliano.

The buckwheat, corn, chickpeas, lentils, green peas and quinoa, among other items, are then dried and ground at a local mill.

The production process draws together centuries-old tradition and modern tastes:

“Taking our cues from tradition, we have sought to develop innovative pasta products, while making sure never to compromise on palatability and cooking characteristics” Fulvia Ruata, the company's managing director explains.

“We use traditional methods: the dough is made from just water and flour, bronze drawn for a rough-textured pasta, and dried slowly at low temperatures (for 24, 28 or even 30 hours) to lock in its organoleptic and nutritional properties.

Additionally, we also aim to develop a product that stands out in the market, including by using unusual ingredients, in a

deliberate attempt to create something at once innovative and traditional, and that can satisfy all palates.”

This is the idea behind the range of items featuring flours made from grains and pulses including buckwheat, corn, chickpea, lentil, green pea and quinoa, among others, as well as hemp, bamboo fibre and amaranth. All ingredients are gluten-free, and therefore suitable for coeliacs and those with a gluten intolerance – “Our idea is not to focus on what coeliacs can't eat, but instead to offer them new flavour experiences to try” – but also perfect for anyone looking for something different and interested in trying a 100% natural food.

Ms Ruata, what cost is involved in such diversification of production?

It's fair to say that there are pros and cons. Developing these recipes using different ingredients certainly requires significant effort, which in turn gives rise to costs in terms of research, calculations, practical testing. Then there is the cost of the ingredients themselves, which is certainly not negligible, particularly in the current times: it's a significant outgoing that must be weighed up carefully. And then there's the cost of packaging, and we have lots, all specific to the various recipes.

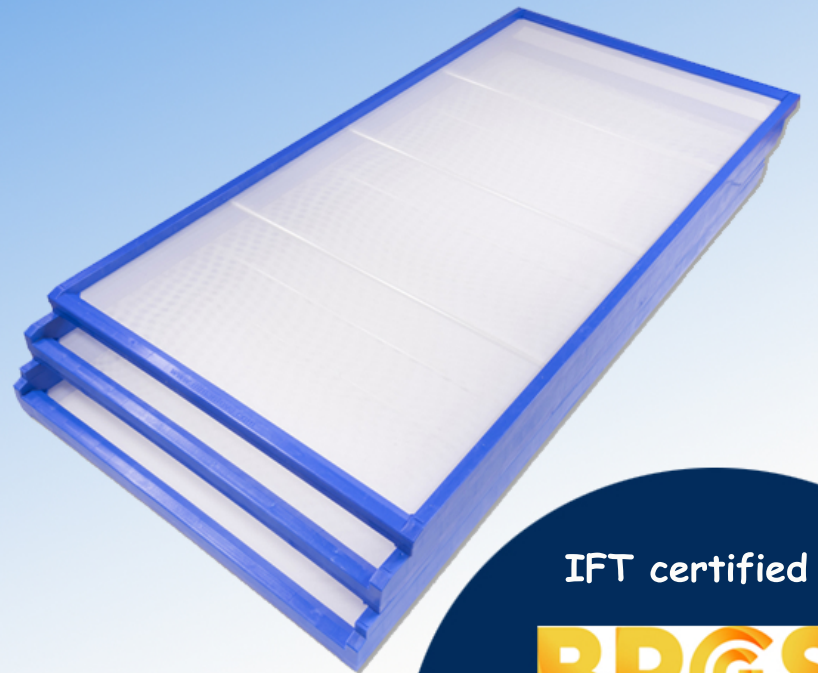
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Fulvia Ruta and Nicholas L'Abbate



costs, which add up to a not insignificant amount; but on the other are our satisfied customers, who are pleased with the result, and who motivate us to continue to make these financial and intellectual investments, diligently, but also always in the hopes of coming up with another great success.

How do you decide what quantities of flours you need to produce the pasta? I presume they vary depending on the types?

Quantities vary from year to year, from month to month...everything changes very quickly! We decide based on demand, and

also on how much we have planned to produce.

It's often challenging to find sauces to suit gluten-free pasta, because the flours themselves have a very strong taste, and can clash with the flavour of the condiment. Yet your website suggests lots of winning combinations. How did you come up with these recipes?

When developing a new product, one (short) step of the project focuses specifically on this issue: identifying a condiment that might go well with our new recipe. Once we've put together a little list



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of ingredients with flavours that might work well all together, and tested our new recipe, we move on to the tasting stage. We do additional taste tests, perhaps using simple ingredients that people have in their fridges at home, and this gives us some simple, quick and accessible ideas. That said, for more elaborate recipes we enlist the help of a food blogger, who works thoughtfully to pair our pastas with sauces and condiments that whet the appetite and make the mouth water.

Of all types of pasta on offer, which is most popular in Italy? And abroad?

The traditional corn and rice, but pulses also top the list, both in Italy and abroad.

What are your markets and how do you reach them?

Most of our business comes from the international market, we really sell a lot abroad. By now our products are available in a huge number of countries, including Germany, Spain, Belgium, Russia, Saudi Arabia, USA and Hong Kong! It took a lot of work to get here: if you consider that our company was founded in 2016 and that, just as it was really beginning to grow, we found ourselves in a period that nobody wants to look back on, of quarantines and forced isolation. But Pasta Natura has character and strength in spades, and it continued to grow, working

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to carve out a space for itself between one market and another. Now that the fairs are back up and running, it's definitely easier to get our name out there: it's always nice when a curious customer approaches us looking for information, face-to-face.

You also offer an organic version of many of your items...

Of course. As far as we are concerned, the market in general, and sales, favour organic. An internal estimate suggests that organic products account for 75-80% of sales. We also offer Private Label items for the overseas market, and almost all of these are organic products.

You also have a dedicated pharmacies line: what does this consist of and how did you manage to break into the “prescription” channel?

The prescription line exists because it's important that our target market has easy access to our products. And so the decision was made to make our products available on prescription, so that they can also be purchased in pharmacies.

Ultimately, these products are always made with quality in mind, and designed to be safe and tasty for our end customers. Our motto speaks for itself: “Let's focus on what we can eat, not on what we can't.”

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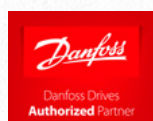
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You have a comprehensive website and a Facebook page. How important is the internet for your sales?

As mentioned, meeting customers in person is lovely, but we don’t always have our full product range to hand. This is where the website and Facebook page come to the rescue. We can easily find photos of a specific type of pasta and show it to the customer, and this makes it quicker and easier to ensure we each know what the other is talking about. And, as our products are also available on various online sales platforms, the web

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certainly also accounts for a small percentage of our sales.

Why don't you sell products online directly from your website?

We are currently in the process of developing and growing, and as such we prefer to focus and dedicate time to “traditional” sales, as this is a good way to get our name out there. We do however have various e-commerce clients that purchase our pasta to sell it online. One of our goals for the coming years, though, is to invest a little more in this area, and perhaps then we might get to the point of selling our products directly.

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CEO

Fulvia Ruata

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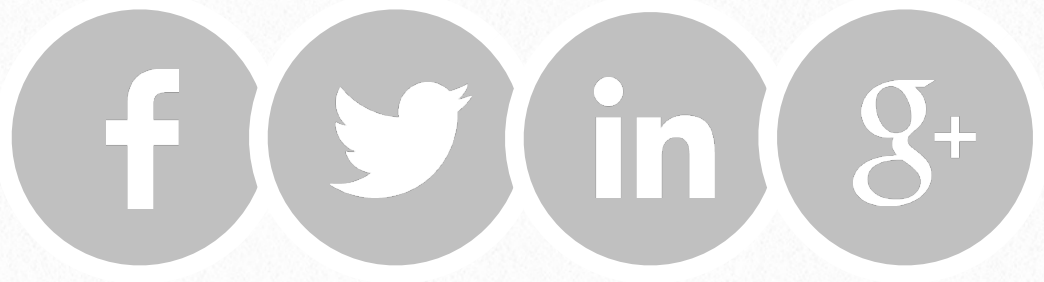


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3



The modified atmosphere and relative control systems for fresh pasta

Fabio Licciardello

Italian Scientific Group for Food Packaging (GSICA)
University of Modena and Reggio Emilia



A summary of Fabio Licciardello's presentation at the *Pasta Packaging and Shelf Life* conference, held at Pastaria Festival 2022.

Modified atmosphere packaging (MAP) is what is known as a “hurdle technology” (based on Leistner and Gorris’s 1995 “hurdle theory”), a term used to refer to combined strategies that aim to slow the chemical, physical and microbiological spoilage of fresh products. Modified atmospheres, widely used today to extend the shelf life of various categories of packaged products, involve replacing the air with gas mixtures specifically designed to prevent the development of product-altering microorganisms and slow other reactions that contribute to qualitative deterioration. In most applications, such as fresh pasta, the aim is to eliminate the oxygen and replace it with nitrogen and carbon dioxide.

MAP is by no means a recent tool, but rather a very well established technology in the food sector. As far back as 11 October 1984, Italian Ministerial Decree containing *health and hygiene standards relating to packaging certain food products in a controlled atmosphere* authorised the use of gases to package *special fresh egg pasta and special filled pasta*. Italian Decree no. 50 of 27 January 1988, containing transitional provisions on the labelling of products governed by Italian Ministerial Decree of 11 October 1984, adopted the term “modified atmosphere”, used today as an alternative for “protective atmosphere”. The gases used in MAP are listed in Reg. (EU) 1129/2011, amending Annex II to Reg. (EC) 1333/2008 establishing a Union list of food additives; specifically, the packaging gases, identified by their respective E-codes (E-290 for carbon dioxide, E-948 for oxygen, E-941 for nitrogen), can be used across all food categories, without restriction (*quantum satis*).

Each of the three main gases used in modified atmosphere packaging has a specific role. Oxygen is a respiratory substrate, and as such facilitates the development of aerobic microorganisms (including many that are product-altering), plant respiration and oxidative processes, which are generally unwanted. Nitrogen is used to replace oxygen, preventing oxidative phenomena, and to stop packaging from collapsing. Carbon dioxide has the most “active” role. It inhibits the development of microbes, and gram-negative bacteria and moulds in particular, slows down plant

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metabolism, and has a “residual effect” after the packaging is opened. Indeed, this gas binds to the amino groups in proteins, and is gradually released. Additionally, carbon dioxide is characterised by a high degree of solubility in foods, which changes depending on the composition and temperature ([Figure 1](#)).

Modified atmosphere packaging can be applied to a broad range of products, from those with low water activity, in which the main aim is to slow oxidative phenomena, to products with high water activity, such as fresh and filled pasta, in which the main aim is, instead, to inhibit product-altering microflora. Indeed, the high degree of perishability of such products derives from the water activity values and from complex, nutrient-rich formulations that serve as an optimal substrate for the development of bacteria and moulds. In the case of fresh pasta, quality loss is primarily linked to fungal development (particularly *Penicillium*). MAP technology is used with fresh pasta to complement, rather than replace pasteurisation, significantly inhibiting the development of product-altering organisms that may have survived the treatment or

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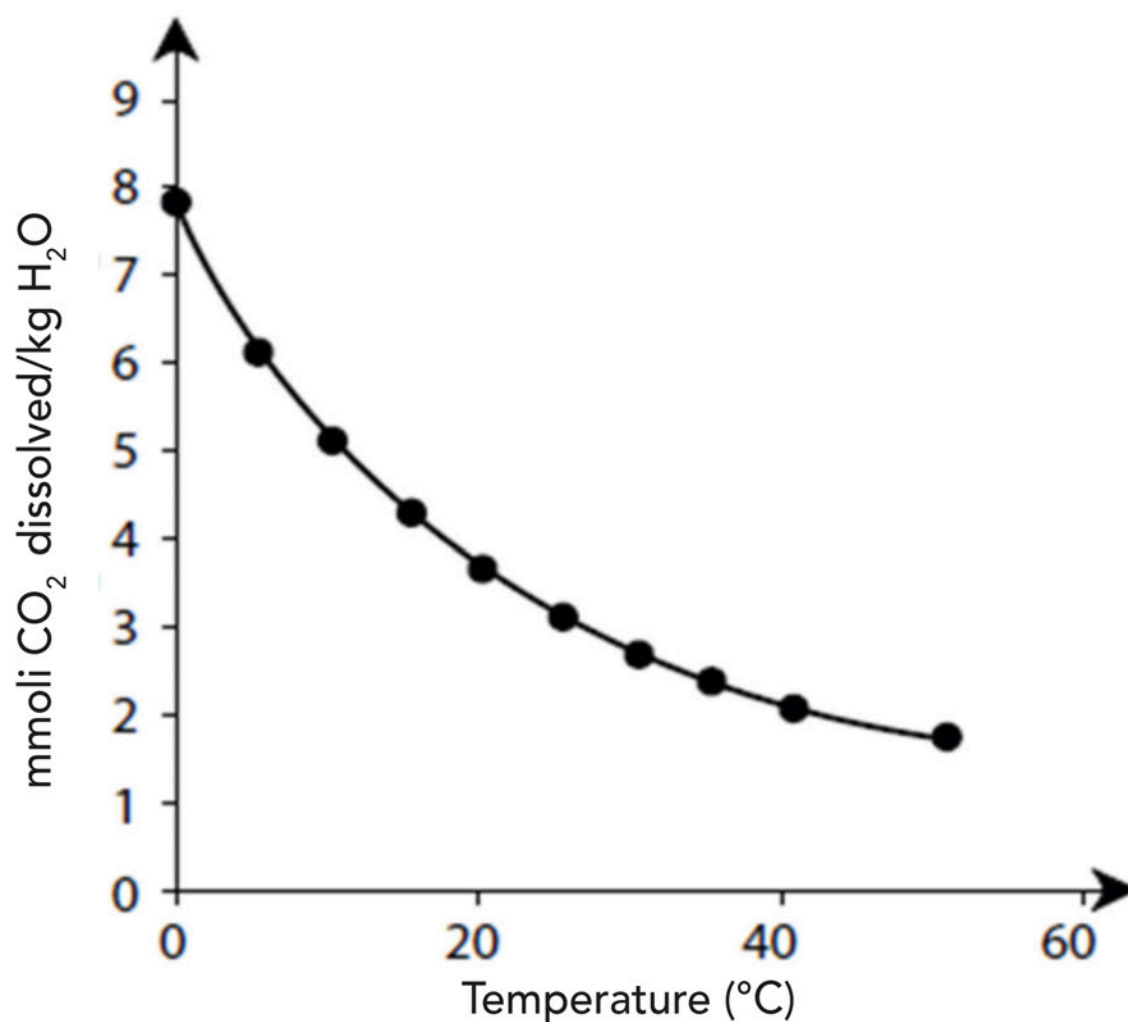
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Figure 1 DEPENDENCE OF THE SOLUBILITY IN WATER (AT 1 bar) OF CARBON DIOXIDE ON THE TEMPERATURE



From: Piergiovanni & Limbo. Food Packaging – Springer Verlag Italia, 2010

re-contaminated the product after pasteurisation. Modified atmospheres for fresh pasta generally consist of 30-40% carbon dioxide and 60-70% nitrogen, with the aim of eliminating oxygen as much as possible from the head space. MAP serves as an effective “hurdle” to the development of product-altering microorganisms and (to continue the analogy), like a hurdle race, it requires “technique and style” to execute properly. Indeed, in order to correctly apply the technology, the following information is essential:

the perishability of the food in air: i.e. the main factors that cause the product to deteriorate (microbiological, oxidative, enzymatic, etc.);
the solubility of carbon dioxide in the food at different temperatures, and any organoleptic changes associated with dissolution of the gas. It is also important to ensure that the desired partial pressures of gas are achieved in the head space, and maintained throughout the shelf life. Ensuring the effectiveness of a modified atmosphere packaging system not only depends on choosing the correct gas



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mixture, but also on the ability to maintain it throughout the entire market life. In that regard, the gas-barrier properties of the packaging play a fundamental role, as does the effectiveness of the sealing processes. Indeed, proper application also involves testing downstream of the packaging line, to verify proper replacement of the air with the gas mixture, and the absence of packaging defects, e.g. micro-perforations or tears in the material, and imperfect seals. Sealing issues, in particular, are not uncommon in the fresh pasta sector, and may arise due

to the presence of residue on the sealing bars and/or food getting stuck within the seal. In any case, such situations certainly result in much quicker qualitative deterioration than expected, causing the composition of the head space to begin to revert towards the atmospheric conditions. Maintenance of proper refrigeration conditions also plays a fundamental and synergistic role with MAP. Indeed, it has been shown that if micro-perforations are present in packaging, the speed at which moulds develop is linked to storage temperature; temperature abuse



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accelerates the return of carbon dioxide, dissolved in the product, to its gaseous state, resulting in the loss of its residual effect (Zardetto et al., 2022). Even if properly replaced with nitrogen and carbon dioxide, oxygen can re-enter the packaging due to accidental defects or the natural permeability of the packaging material. Even small concentrations of this gas can stimulate the development of product-altering moulds and, as such, its elimination is fundamental to ensuring the effectiveness of the MAP system for fresh pasta. In this regard, in addition to completely replacing the air with the appropriate gas mixture, and selecting materials that offer adequate barrier performances, the packaging can be further protected by means of active packaging systems. Active packaging featuring oxygen absorbers incorporated into the material, or supplied in separate sachets or adhesive labels, can absorb any oxygen that remains inside the packaging or enters through gaps. As such, it works with the other technologies applied (referring once again to the “hurdle theory”) to ensure quality maintenance. The gas verification systems used today are essentially based on destructive testing of a sample of the head space, using needle analysers that collect a sample of gas and measure the partial

pressures of oxygen and carbon dioxide. This is the most cost-effective system, but it has obvious limitations, as it is not possible to check all units produced and obtain statistical information. Modern gas testing systems based on optical technologies, such as laser spectrometry, may be implemented in line and offer the huge advantage of monitoring the composition of the head space of all units produced, automatically discarding non-conforming packaging from the line. In exchange for much higher initial costs, these systems guarantee the utmost standardisation, minimising complaints at the distribution stage and contributing to building greater trust between the customer and the brand.

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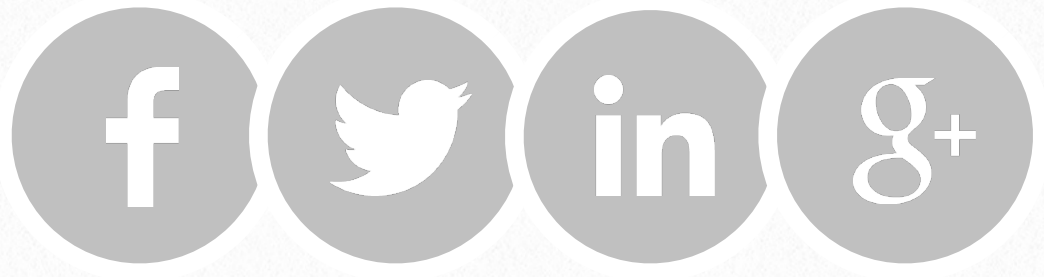
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4



The *imbutini* production machine

Editorial staff



Introducing a shaping machine capable of producing a highly original laminated pasta shape, the “*imbutino*”, made by Bologna-based company Sapori in Forma. The shaping machine, previously only suited to small and medium artisanal production facilities, is now also available for industrial production purposes, thanks to a collaboration with Pasta Technologies Group.

We covered the original new pasta shape, creatively devised a few years ago by Flavia Valentini, in an article in *Pastaria* 4/2022 (*Imbutini: from Emilia, a new, interesting and well-received pasta shape*).

A small shape produced from laminated sheets, the “*imbutino*” is increasingly appearing, to great acclaim, on the tables of a growing area of Emilia Romagna. The only machine capable of producing it was designed by Saponi in Forma, a young, dynamic company in Argelato, in the province of Bologna.

The *imbutini* production machine

A unique and patented shaping method, combined with sturdiness, reliability, and a design that facilitates cleaning and sanitisation: these are the features that, in construction terms, best sum up the *imbutini* shaping machine developed by Saponi in Forma.

It can be incorporated into a production line, with dough fed from an upstream mixer, or used as a stand-alone device, fed with ready-rolled sheets. It can be coupled with fixed containers downstream of the machine, or with conveyor belts to carry the product to the subsequent workstations.

Table 1 TECHNICAL DATA

Model	MF15/45	MF25/75
<i>Production</i>		
Production capacity	45 kg/hour	75 kg/hour
<i>Size and weight</i>		
Width (mm)	740	740
Length/depth (mm)	600	700
Height (mm)	1208	1208
Weight (kg)	250	270
<i>Electrical data</i>		
Power (kW)	1.5	2
Power supply (volt)	230	230
<i>Sheet</i>		
Pasta sheet width (mm)	150	250

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A machine for small production facilities, and beyond

Thanks to its compact size, the *imbutini* shaping machine is particularly well-suited to small artisanal production facilities.

There are currently two versions of the Sapori in Forma shaping machine available: the MF15/45 model, which can produce 45 kg/h of *imbutini* from a 150 mm sheet, and the MF25/75 model, with production capacity of 75 kg/h and a sheet width of 250 mm.

Soon, however, the shaping machine may also make its *début* in large-scale industrial pasta factories.

“We are very pleased to announce that, thanks to a recent commercial agreement, Pasta Technologies Group (the well-known company from Onara di Tombolo - editor’s note) has now developed, and brought to market, *imbutini* shaping machines that can meet the production requirements of larger pasta factories” reveals Luca Tommasi, of Sapori in Forma.

The Sapori in Forma *imbutini* production machine (mod. MF 25/75)



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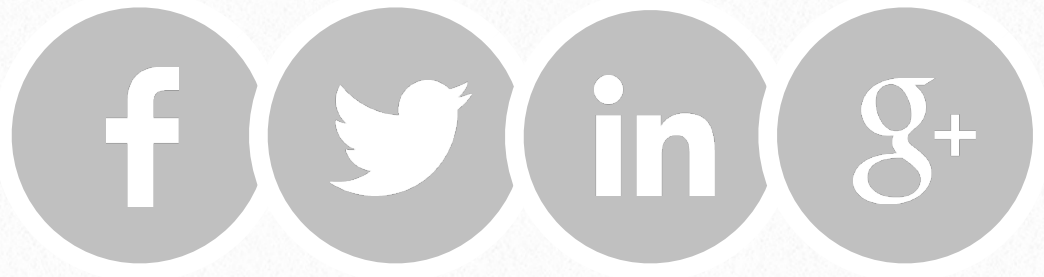
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5



Pastaria's spring webinar series returns

Editorials staff



The second edition of the Pastaria spring webinar series opens on 17 April with a session entitled *“Geocrises and distorting effects of the climate on commodities markets: prospects for pasta producers”*. Reserved for operators in the sector registered with pastaria.it, the series is free-of-charge and offers an in-depth exploration of various topics.

Pastaria's spring webinar series

Now in its second edition, Pastaria's spring webinar series is back. By collaborating with authoritative experts, these sessions provide opportunities to delve deeper into issues that are highly topical and of particular interest to those working in the pasta supply chain.

The first session is scheduled for 17 April next and will once again focus on the commodities markets, a topic that drew great interest and engagement last year.

“Geocrises and distorting effects of the climate on commodities markets: prospects for pasta producers” is the title of the first Pastaria spring webinar.

“Geocrises and distorting effects of the climate on commodities markets: prospects for pasta producers”: the first Pastaria spring webinar

More than a year on from the Russian invasion of Ukraine, the commodities markets have seen a number of transformations, some rather evident. Energy price increases are slackening their grip on inflation, the underlying rate of which, however, remains high and under constant monitoring by central banks, which plan to proceed with restrictive monetary policies.

There is no guarantee that the situation is set to become less volatile in terms of prices, including as concerns food ingredients, given the current climate of uncertainty surrounding economic and geopolitical developments and in anticipation of a resumption of orders from China. On the supply side, the climate outlook for farming and food commodities remains unfavourable, with the persistence of drought conditions in Europe and beyond, a situation that is discouraging investments in certain production sectors and limiting yield prospects. To shed light on the current tensions, the Pastaria Centre for Economic Research has organised the webinar (scheduled for Monday 17 April 2023, at 11:00 a.m.), which provides an opportunity to delve deeper and

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reflect on the dynamics characterising the markets and the world economies, while also offering an outlook on the specific variable factors at play for the wheat-pasta supply chain, in light of potential developments in terms of harvest and the 2023/24 trade year.

Taking part

Attendance is free and reserved for operators in the sector, with mandatory registration until all places are filled. Users registered with pastaria.it will receive a dedicated newsletter with details of how to take part.

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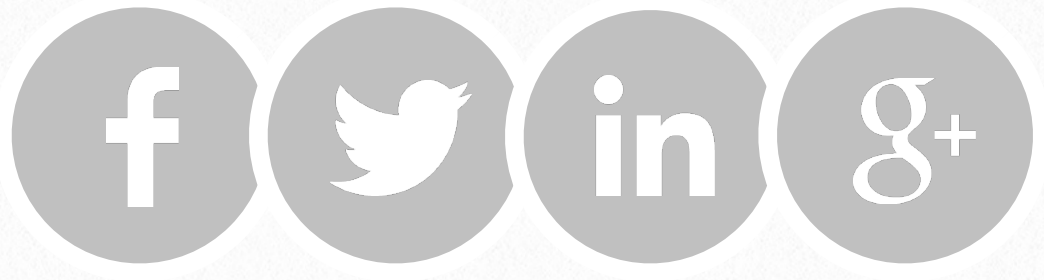
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6



Higher wheat prices lead to increased EU sowing this season

Pastaria Centre for Economic Research



Analysts' estimates predict an increase in wheat sowing, with positive developments for the coming harvests.

A better outlook is expected for wheat in the 2022/23 season, as regards supply levels, compared to initial expectations. But perhaps the most eagerly awaited news is the confirmation, based on the analysts' preliminary estimates, of an increase in the areas allocated to wheat, also in Italy, with further positive developments possible for the coming harvests.

The first reassuring evidence was provided by the analysts of the UK International Grains Council (IGC), whose latest forecast has confirmed the positive outlook for 2022/23 world wheat production. An estimate which largely reflects the improved assessment of the Russian harvest, with Moscow – according to the forecast of the US Department of Agriculture (USDA) – expected to export a record 43 million tonnes of wheat this year, thereby strengthening its global leadership.

In its monthly report, the UK intergovernmental board set the bar for the world harvest at 791 million tonnes in 2022/23, up from an initial estimate of 778 million. Compared to last season's levels, this new estimate forecasts a growth of 10 million tonnes (production in 2021/22 amounted to 781 million tonnes), corresponding to a year-on-year increase of 1.3%, contrary to initial expectations.

It should be noted that according to the latest calculations, as a corollary to a particularly favourable year in terms of weather, Russia should produce around 93 million tonnes of wheat, an increase on both the preliminary forecast of 87.6 million and the USDA outlook published in the December report, which set the Federation's output at 91 million tonnes. Still in connection with the role of Moscow, the IGC is more cautious in formulating its 2022/23 exports forecast, capping it at around 37 million tonnes (6 million less than the USDA's indications), an assessment that incorporates greater stockpiling in the country, with stocks almost double those of the previous year.

It is important to remember that, since February last year, after the outbreak of the war in Ukraine, Russian wheat has taken on a key role in supplying the entire Mediterranean area and overseas, due to the unexpected lack of Ukraine's equally important supplies which, before the



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war, amounted to almost 20 million tonnes in annual exports. Logistical and operational difficulties, and the losses caused by the inactivity of certain storage centres have effectively halved exports in Ukrainian wheat since the beginning of the season, making procurement activities more complex, particularly by African and Middle Eastern countries. Against this backdrop, which has given a sharp impetus to prices on the international markets, analysts are paying particular attention to the role of Moscow which, together with the European Union (the 27 EU states would be in a position to export 36 million tonnes of wheat this year), is among the suppliers currently able to compensate for the production deficits brought about by prolonged droughts in certain areas of the world (Argentina in particular).

Recently, Russia prevailed over its direct competitors, winning the auctions to supply the North African countries (first and foremost Egypt and Tunisia) and Turkey, mostly to the detriment of France, which has, nonetheless, intensified its export activities. The present inter-currency situation, with the rouble dropping in the exchange rate against the US

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dollar, helps Russian competition, even though Western sanctions are progressively hampering payments and financial intermediation, as well as relations with insurance and shipping companies.

With regard to the above-mentioned new sowing, an overall better balance is expected in Europe compared to the last season. The first forecasts were published by COCERAL, the European association of buyers and traders, estimating – with an allocation in the 27 EU member states of 24.6 million hectares – a 1.6% growth in

wheat planting areas. The detailed data show different trends between soft wheat, which covers an area of 22.2 million hectares and is up by about 2%, and durum wheat, which, with 2.3 million hectares, would experience a drop in its EU allocation of one percentage point. In Italy, durum wheat sowing allegedly covers an area of 1.3 million hectares this year, down 1.1%, while soft wheat, planted on 580,000 hectares, has allegedly gained 9.4% compared to last season. It is important to point out – given the shortages due to the consequences of the

Table 1 WHEAT, ALLOCATION FORECASTS AND HARVESTS IN THE EUROPEAN UNION

	Surface areas (.000 ha)			Production (.000 tons)		
	2022	2023	Variation %	2022	2023	Variation %
Soft wheat						
EU-27, of which:	21,843	22,253	1.9%	125,464	128,903	2.7%
Italy	530	580	9.4%	2,65	2,958	11.6%
France	4,686	4,74	1.2%	33,645	34,128	1,4%
Germany	2,947	3,05	3.5%	22,501	22,875	1.7%
Spain	1,855	1,865	0.5%	5,101	6,807	33.4%
Durum wheat						
EU-27, of which:	2,372	2,348	-1.0%	7,139	7,581	6.2%
Italy	1,315	1,3	-1.1%	3,616	3,9	7.9%
France	252	255	1,.%	1,343	1,339	-0.3%
Germany	385	390	1.3%	809	858	6.1%
Spain	250	250	-	563	775	37.7%

Source: Coceral



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war in Ukraine – that in order to increase cereal production, the European Commission has granted a derogation, for the whole of 2023, from the mandatory annual rotation requirement provided for by the Common Agricultural Policy (CAP) 2023-2027, allowing European farmers to plant on fallow land. A measure, mostly affecting wheat, that enables production on 4% of the set-aside areas of farms with more than 10 hectares of UAA (utilised agricultural area).

With the suspension of this obligation, at least three million hectares are expected to be put to use in the EU during the current season, approx. 200,000 of which are in Italy. COCERAL's forecasts, which, however, also take into account the results of cross-investment choices involving alternative crops, limit increased wheat allocations to approx. 400,000 hectares at EU level, and 35,000 hectares in the specific case of Italy.

The forecasts also consider a 1.2% increase in sowing in France, Europe's leading wheat producer, and a 3.5% increase in Germany, with a general rise in wheat allocations also among the major Eastern European producers, with the exception of Poland.

In view of better average yields than last year, COCERAL expects increases in EU harvests of 2.7% for soft wheat and over

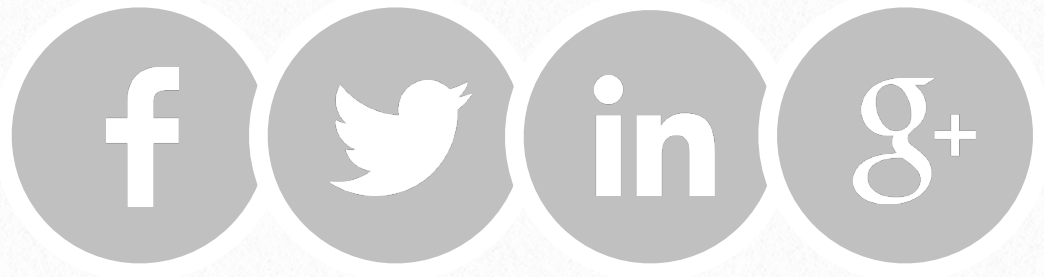
6% for durum wheat, with volumes of 128.9 million tonnes and 7.6 million tonnes, respectively. In Italy, the production of durum wheat could rise to approx. 4 million tonnes in July, an increase of 8%. Under normal yield conditions, the national soft wheat harvest should reach 3 million tonnes, a year-on-year increase of almost 12%, heralding, albeit with no great ambitions, less dependence on imported grains.

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7



Pastaria Awards 2023 for the best doctoral and master's theses on pasta

Editorial staff



Candidate nominations are under way for the fifth 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 2023 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 (one hundred and fifty/00).

Awarding of the prizes

The prizes will be awarded on the occasion of the seventh Pastaria Festival.

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 2021 and July 2023, 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 2021 and July 2023.

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 2023. [Download the invitation and participation request.](#)



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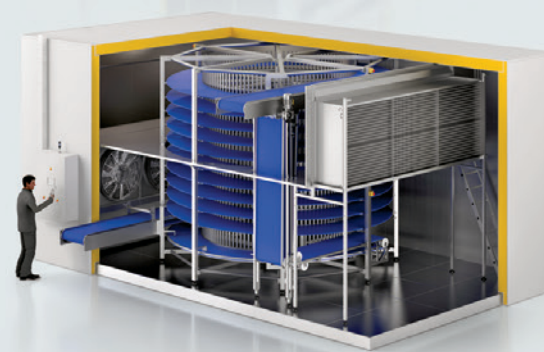
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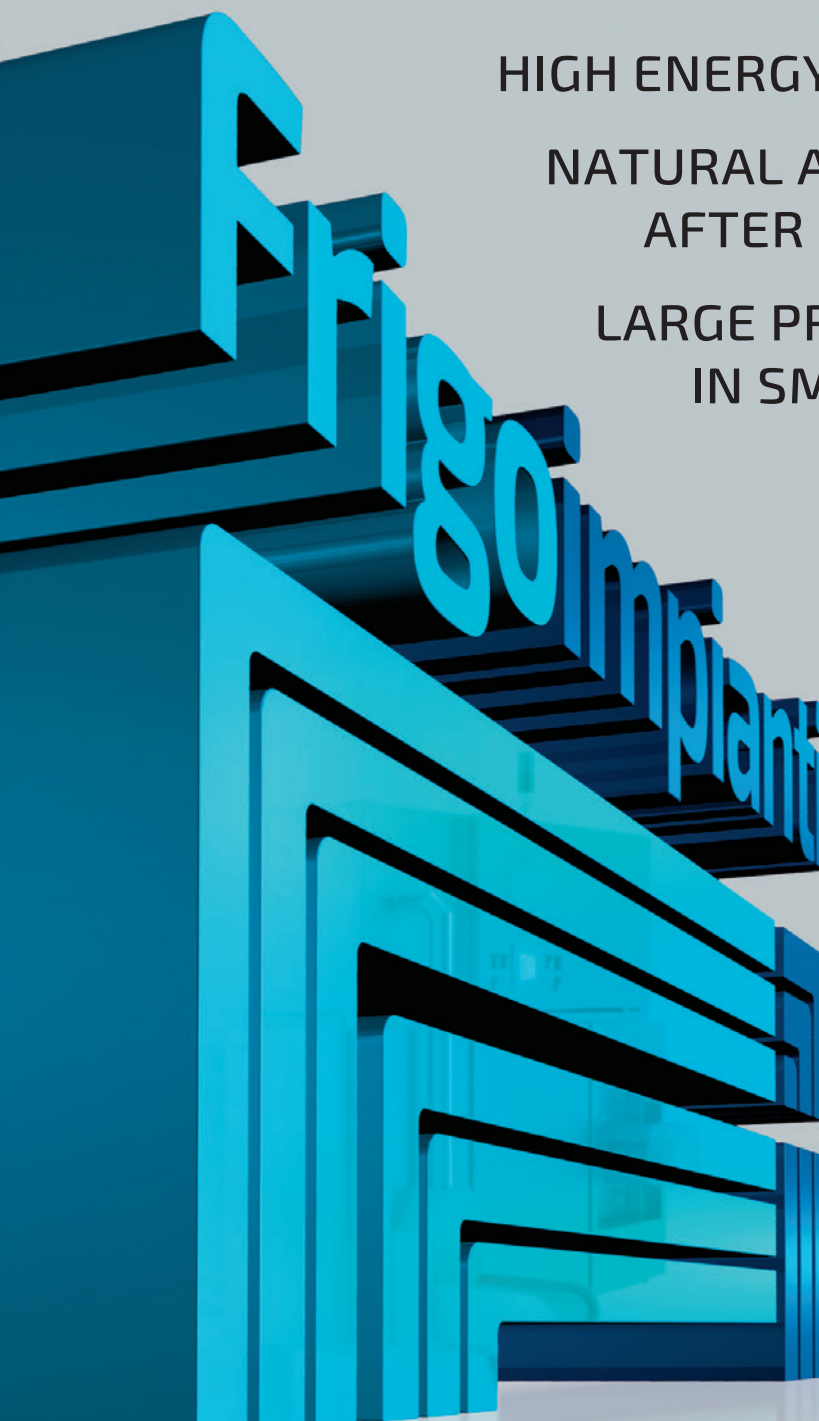
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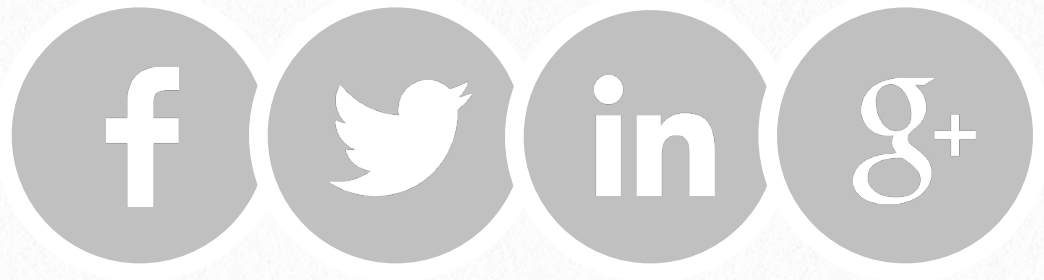
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8



2023 food trends: pasta among the top 5 ingredients

Press release



Also this year Whole Foods Market has presented its forecasts for the most popular food trends during 2023. Tuttofood has reported the data processed by the US food company, to give the broadest possible view of what we will find on the table and anticipate some novelties, also in terms of packaging.

Five top ingredients

In the list dedicated to food sector trends for 2023, there are great returns, but also surprising new entries. The ranking was drawn up by the Trends Council in consultation with leading industry experts, both locally and globally.

So here are the 5 ingredients that will not be missing on our tables.

Dates

Dates will not only be consumed in the form and way we are used to, but also in drinks, yogurt and sauces. And it is no coincidence that last year Tuttofood launched, in collaboration with HostMilano, The Dates Connection contest which traces a culinary union between East and West, with the dates being the absolute protagonist with some contemporary reinterpretations. The semifinal of the Contest, held in November 2022, saw the presence of the Saudi National Centre for Palm and Dates, which at Tuttofood 2023 will present to Italian and international markets the country's over 300 varieties. The semifinals continue until March in Qatar, the United Arab Emirates and lastly in Italy. The big final event will be held in Italy, in a still top secret venue. The initiative is part of the international process towards the 2023 editions of Tuttofood and HostMilano.

Chicken

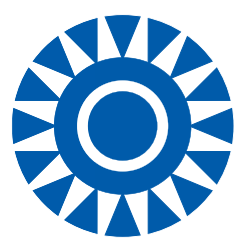
Another protagonist on the table will be chicken by companies that do not provide intensive farming and are attentive to animal welfare.

Seaweed

Thanks to the very large diffusion in oriental restaurants, seaweeds have experienced an increase in consumption.

Pasta & co

Pasta could not be missing, no longer only produced with wheat or legumes, but also with vegetables, such as zucchini-based tagliatelle,



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PRC Impianti S.r.l. Borgo Ticino (NO)
Molino Grassi S.p.a. Fraore (PR)
IPAM S.r.l. Zibello (PR)
Flavourland S.r.l. Pero (MI)
G&Partners S.A. Taverne (CH)

Italgi S.r.l. Carasco (GE)
Milani Foods S.r.l. Verona (VR)
Parmovo S.r.l. Colorno (PR)
Pastaria - Kinski Editori Parma (PR)
ePublic S.r.l. Novara (NO)
Vercelli S.p.a. Formigliana (VC)



A.P.Pa.Fre. Sede operativa c/o CNA PIEMONTE NORD

Viale Dante Alighieri 37 - 28100 Novara (NO)

Tel. 0321.399564/5 - Fax 0321.398488

info@appafre.it - www.appafre.it

Piemonte Nord



jovial spaghetti (organic brown rice shell), fusilli with green banana or gnocchi prepared with cauliflower.

Yaupon

this plant, that grows mainly in North America, contains an important percentage of caffeine in the leaves. The leaves are generally used to prepare herbal teas, but they have also become one of the leading ingredients of barmen for making cocktails.

New trends for the “right” packaging

Tuttofood has always paid great attention to issues concerning environmental protection, monitoring the best practices in the supply chain and production dynamics, which also involve the creation of less polluting and recyclable packaging. The evolution of packaging goes hand in hand with the evolution of the industrial world, as well companies’ operating and logistical methods and the ever-growing respect for nature. For this reason, Tuttofood has established and promoted

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**

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

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the Better Future Award which, precisely with the “Packaging” category, intends to evaluate the packaging design quality in their communicative and functional dimensions, with great attention to the informative component and environmental sustainability. These principles are also shared by Whole Foods, which emphasizes different types of food packaging, including those 100% polyethylene-free, with the aim of adopting 100% compostable solutions. At the moment the American giant is using packaging made with wood fiber called Bio Plus Earth, composed of recycled materials, more resistant to both heat and

cold and with a percentage of polymers less than 60% compared to old packaging.

Tuttofood is the international and innovative platform for the entire agri-food sector, which every two years brings together the elite of food&beverage and retail at fieramilano.

Tuttofood 2023 will be held at fieramilano from 8 to 11 May 2023.



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