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Commodity price observatory 3/2025

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

A hot, fraught summer. Not only because of the high temperatures but also because of the heated debate around Trump's tariffs, which have generated apprehension among Italian traders, worried about the fate of exports.

In the background, there is the currently hot topic of exchange rates, with the weakness of the dollar posing perhaps a greater threat to European producers than the imposition of a customs tariff, which will, in any case, be absorbed in a relatively balanced manner along the supply chain, with a share also being passed on to final prices.

The agreement between the US and the EU envisages the imposition of a 15% tariff as a baseline for European products exported to the States.

This is obviously no small increase, considering that, on average, before Trump took office in the White House, the tariff was around 3%.

In the agri-food industry, where Italian exports to the US predominantly consist of high-quality, high value-added products, the implications of the tariffs will be less evident, unlike more standardised goods (typically soft commodities), which can easily be replaced and are characterised by tighter margins.

There is also the loophole of the "zero-for-zero" principle, which provides for the reciprocal elimination of tariffs on a selected list of products, potentially including certain agri-food categories and several critical raw materials. But the lists are still to be drawn up, as are the contents of a transatlantic cooperation agreement that could bring further benefits that might help resolve the current impasse.

From the "glass half full" perspective, it must be said that the acknowledgement, albeit unwelcome, of the 15% tariffs has at least made it possible to move on from the uncertainty of these convulsive months, marked in Europe by exceptional upheavals in political and trade relations with the US.

As far as the markets are concerned, in a still unresolved geopolitical context, predominantly bearish dynamics are being observed on the commodity circuit. The energy aggregate showed an underlying negative trend over the summer, without abrupt movements and, above all, without



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PRICES AND TRENDS OF CERTAIN FOOD RAW MATERIALS (AUGUST 2025)				
National fine common wheat	Price (€/ton)	Monthly variation	Annual variation	Forecast
	240.5	0.6%	6.8%	▼
Fine durum wheat from North Italy	Price (€/ton)	Monthly variation	Annual variation	Forecast
	280.5	-4.9%	-10.5%	▼
00 type common wheat flour	Price (€/ton)	Monthly variation	Annual variation	Forecast
	500	0%	-3.8%	=
Semolina above min. leg. req.	Price (€/ton)	Monthly variation	Annual variation	Forecast
	557.5	-0.6%	-5.9%	▼
Eggs M	Price (€/100 pcs)	Monthly variation	Annual variation	Forecast
	19.1	1.3%	20.9%	=
Pork hams for Prosciutto 12 kg and over	Price (€/kg)	Monthly variation	Annual variation	Forecast
	4.96	3.8%	5.1%	=
Beef – veal meat half-carcass, prime quality	Price (€/kg)	Monthly variation	Annual variation	Forecast
	7.89	2.5%	22.5%	▲
Raw milk	Price (€/100 kg)	Monthly variation	Annual variation	Forecast
	59.25	-10.6%	-2.3%	=
Centrifuged butter	Price (€/kg)	Monthly variation	Annual variation	Forecast
	7	-3.8%	-3%	▲
Grana Padano aged for 9 months or more	Price (€/kg)	Monthly variation	Annual variation	Forecast
	10.93	0%	9.7%	=
Extra virgin olive oil	Price (€/kg)	Monthly variation	Annual variation	Forecast
	9.4	-1.6%	2.7%	▼
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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PRICE MONITORING

FAO Food Price Index	Price (2014-2016=100)	Monthly variation	Annual variation	Forecast
	130.1	1.6%	7.6%	=
Hard Red Winter US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	234.96	-2.1%	-6.3%	▼
Mais, U.S. No. 2 Yellow FOB US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	191.99	-2.1%	12.7%	▼

Fao Food Price Index, Hard Red Winter, Mais: July 2025

fears of possible tensions, at least in the short term, in the light of robust essential resources and a tendency of supply expansion by producer countries.

Developments in agricultural and food commodities have been uneven. In the cereal sector, this year's favourable conditions have given the wheat sector greater strength in terms of production, both in Europe and in other important supply regions.

Prices are falling sharply and a further decline cannot be ruled out, given the strong competitive pressure on world markets, especially from the Black Sea ports.

The spike in Russian grain, with Moscow's harvest likely to top 86 million tonnes this year (it would be the third highest ever), is dragging down French wheat prices in particular. Paris faces the challenge of having to sell 9.5 million tonnes to non-EU

markets, only 28% of the 33.4 million tonnes produced this year in the soft wheat sector alone. According to some analysts, under current conditions, France would only be able to export 8 million tonnes, exchange rate permitting, with the prospect of extra-large carryover stocks totalling 4 million tonnes in the season's final tally. This would be the highest in 20 years.

The underlying negative price trend, albeit followed by a stabilisation phase, has also affected durum wheat, in a market well supplied both domestically (the national harvest is reported to be well over the 4 million tonne mark) and in the rest of the world. Statistics Canada has revised its forecast upwards for the Canadian harvest to 6.1 million tonnes, while at EU level, the European Commission's estimates set the bar at 8.3 million tonnes, 15% more than last season's result.

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With regard to other agri-food products, tensions persist on meat and dairy prices, with record-highs for Grana Padano and Parmigiano Reggiano, and still very elevated for butter. The expectation of a further reduction in the number of cattle raised in EU farms will have additional repercussions on markets, keeping both meat prices and farm-gate raw milk prices under pressure.

On the subject of fats and vegetable oils, a deflationary outlook is emerging with regard to olive oils. In Italy, production is expected to close the season with a robust balance, and prices, currently positioned at very high levels (well over €9/kilo at the Bari Commodity Exchange), could begin a downward phase that has already characterised the Spanish product in recent months.

The situation is different for palm, soya and sunflower oils, which are still under pressure on international markets also due to non-food demand pressures associated with energy-related uses.

No substantial imbalances emerge in the sugar market, with global price trends continuing to show a downward trajectory. The ISO (International Sugar Organisation) forecast confirms with a +3.1% the growth of world production in 2025/26, now estimated at 180.59 million tonnes.

Last but not least, a word on the national

economic outlook: ISTAT economic estimates for the second quarter of 2025 confirm that it is worsening. The 0.1 % quarterly decline of the GDP (preliminary estimate) reflects, between April and June, the combined effect of zero contributions from household and public administration consumption, positive contributions from investments (0.2 percentage points) and the change in inventories (0.4 points), and negative contributions from net foreign demand (0.7 points). Both the primary sector (agriculture, forestry and fishing), down by 0.6 %, and industry (-0.3 %) have slowed down, while services have remained stable.

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Genetic innovation in small grain cereals

Luigi Cattivelli
Council for Agricultural Research and Economics (CREA) – Genomics and Bioinformatics Research Centre



In the past, genetic improvement was fundamental for increasing the productivity of wheat and guaranteeing food for all. Nowadays, nutritional and qualitative aspects in general have gained great importance and numerous wheat lines, both durum and soft, are characterised by distinctive qualitative features that lend themselves to the development of supply chains dedicated to new food products. This article presents a review of the most qualitatively innovative wheat varieties.

Cereals, the raw materials from which we make pasta, bread and other bakery products, are the subject of continuous genetic innovation with several new varieties coming onto the market every year. This intense genetic improvement activity leads to the release of new cultivars characterised by greater resilience, higher productive capacity and also new quality traits. In some cases, the quality traits are so distinctive as to be able to provide the opportunity to develop dedicated supply chains and new food products, although to date the utilisation of these innovations by the food industry is still marginal. In this article, after a brief overview of the most frequently used strategies in the genetic improvement of cereals, we shall look at the most interesting quality innovations that have emerged in the last 20 years in the cereal farming sector.

Genetic improvement

Humans have always worked to genetically improve wheat, selecting varieties that are more productive, more resistant to disease and better adapted to the different climates of the planet. Now that the climate is changing rapidly, selecting new varieties suitable for the climate of the near future is absolutely essential in order to maintain agricultural productivity.

Until the end of the 19th century, wheat was empirically selected within local populations (landraces) that were multiplied locally. Then, with the discovery of Mendel's laws, a more aware approach to genetic improvement began, based on the use of biodiversity to carry out crosses and select the best plants from the resulting populations. Through these techniques, geneticists such as Nazareno Strampelli in the 1920s and 1930s and Norman Borlaug in the 1960s selected short-statured (wheat in the 1800s was at least 150 cm tall) and very productive varieties. Then from the 1960s onwards, genetic improvement began to use chemical or physical (radiation) treatments to induce mutations and then select the best plants from those generated after the mutagenic treatments. The discovery of DNA has opened up new perspectives, making it possible to work with knowledge of the genes that determine traits of interest. The use of molecular markers linked to resistance genes still makes it possible to select resistant plants, but the most discussed application of DNA knowledge is

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undoubtedly the development of Genetically Modified Organisms (GMOs). A GMO is a plant into which a piece of DNA (a gene) deriving from another species has been added, so the soybean resistant to glyphosate (an herbicide used to control weeds) contains a gene from a soil bacterium. In the case of wheat, there is only one GMO that is cultivated to a significant degree. It is a wheat containing a sunflower gene that gives the crop a very high tolerance to water scarcity; this GMO is cultivated in Argentina and Brazil, but is not authorised in Europe. At the beginning of the 2000s, the spread of GMOs sparked off a very heated public debate that led to a ban on their cultivation in Europe (with the exception of Spain), although GMO soya and maize can be imported for animal feed. More on the genetic improvement of wheat can be found in the book *Pane Nostro* (Cattivelli, 2023). Around fifteen years ago, a new technology emerged in the field of genetic improvement: a biological mechanism discovered in bacteria that allows mutations to be induced at specific points in an organism's DNA. In Italy, this is referred to as TEA (Tecnologie di Evoluzione Assistita – Assisted Evolution Technologies), while in English it is known as New Genomic Techniques (NGT). NGT are very different from GMOs, inasmuch as

they do not involve the transfer of DNA from one species to another and are, in fact, simply more efficient – sometimes much more efficient – than traditional techniques such as mutagenesis. This statement is so true that, at a European level, a regulation to treat NGT differently from GMOs is already in the home stretch, and should make NGT easy to use in agriculture.

Genetic improvement for quality aspects

For many years, the genetic improvement of wheat was mainly aimed at increasing productive capacity, but since the 1970s, quality aspects have gained much importance. Historically, the first qualitative innovation in the case of soft wheat was the selection of strong wheat varieties that enabled the production of flour with a high leavening capacity, while, in the case of durum wheat, it was the selection of varieties with a high yellow index that changed the colour of pasta forever. More recently, the selection of varieties characterised by the propensity to accumulate a lot of protein in the grain when supported by appropriate fertilisation led to the increase in the protein content of pasta which, within a couple of decades,

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has reached, and in some cases exceeded, 14% in high-end products. However, above and beyond the improvement of quality traits within what might be called a “traditional” framework, new types of wheat have appeared in recent decades with truly innovative characteristics, often of a nutritional nature. Below is a brief overview of the main quality innovations in wheat.

***Tritordeum*: a new type of wheat**

Tritordeum is a new botanical species selected in Spain in the 1980s by crossing durum wheat with a particular type of wild barley (Ávila et al. 2021). *Tritordeum* is very similar to durum wheat, but is characterised by a much higher yellow index thanks to which semolina with a beautiful bright yellow colour can be produced. *Tritordeum* is currently also cultivated in some areas of Italy where dedicated supply chains are being developed for the production of bread and pasta.

Durum wheat enriched with beta-carotene

The yellow colour of pasta is due to the accumulation of lutein in the endosperm of the caryopses; lutein is a carotenoid pigment with no particular nutritional value. However, by introducing two

mutations in as many genes, it is possible to redirect the biosynthesis of carotenoids towards the production of beta-carotene, a substance with a high nutritional value, given that it is the precursor of vitamin A (provitamin A). Durum wheat containing beta-carotene has been obtained using chemical mutagenesis (as was done in the 1960s), but it could also be generated using NGT (Garcia Molina et al. 2021; Yu et al. 2022).

Durum wheat with soft endosperm

Soft wheat is soft due to the presence of two genes (PinA, PinB) that make the endosperm floury. The transfer of PinA, PinB genes from one durum wheat genotype to another allows the development of durum wheat with soft endosperm, which retains the same qualitative characteristics as traditional durum wheat but is easier to mill and is being suggested for breadmaking, since it eliminates the need for semolina regrinding (Morrist et al.). 2011). Although durum wheat with two soft wheat genes may seem at first glance to be a GMO, in actual fact it was made by crossing a soft wheat with a durum wheat and then selecting plants that retained the characteristics of durum but with soft endosperm. Durum wheat and soft wheat are two different botanical species and cannot normally be

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crossed, but they are also two quite similar species and under certain conditions crossing is possible (a bit like donkeys and horses, which can be crossed under certain conditions to produce mules).

High amylose wheat

Reducing the postprandial glycaemic peak helps limit the onset of Type-2 diabetes. Resistant starch is the fraction of starch that is not digested in the stomach/small intestine and when it reaches the colon it acts as a substrate for the development of beneficial microflora. The presence of resistant starch in food slows down digestion and reduces the postprandial glycaemic peak. One of the factors affecting the amount of resistant starch is the content of amylose, one of the two fractions that make up starch (amylose and amylopectin). A mutation in the durum wheat gene that triggers the synthesis of amylopectin brings about an increased accumulation of amylose that can rise to 50% of the total starch, compared to a normal value of around 25% (Sestili et al. 2010). Durum wheat lines with

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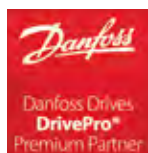
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a high amylose content have 5-10 times more resistant starch, and consequently reduce the glycaemic peak. These plants were obtained by chemical mutagenesis, but they can also be generated with NGT.

Perennial wheat

Wheat is normally an annual plant and must be sown every year, usually in autumn, and after harvesting the plant dies and does not grow back. There are, however, some wheat varieties that do not have to be sown every year; they are perennial wheat varieties that have the ability to grow back once harvested when climatic conditions allow for the plant's regrowth. So perennial wheat does not have to be sown every year. Perenniality was introduced into wheat cultivated from wild wheat species through crossing techniques. This innovation does not, in itself, change the quality of the harvest, but by reducing the need for multiple field operations, it enables greater sustainability of the crop. This could become a value-added feature for products made from perennial wheat. Of course, perenniality comes at a cost in terms of yield potential.

An alternative to perennial soft wheat is the use of a wild-origin, also perennial wheat known by the trade name Kernza[®]. However, Kernza flours have different

quality characteristics compared to traditional wheat.

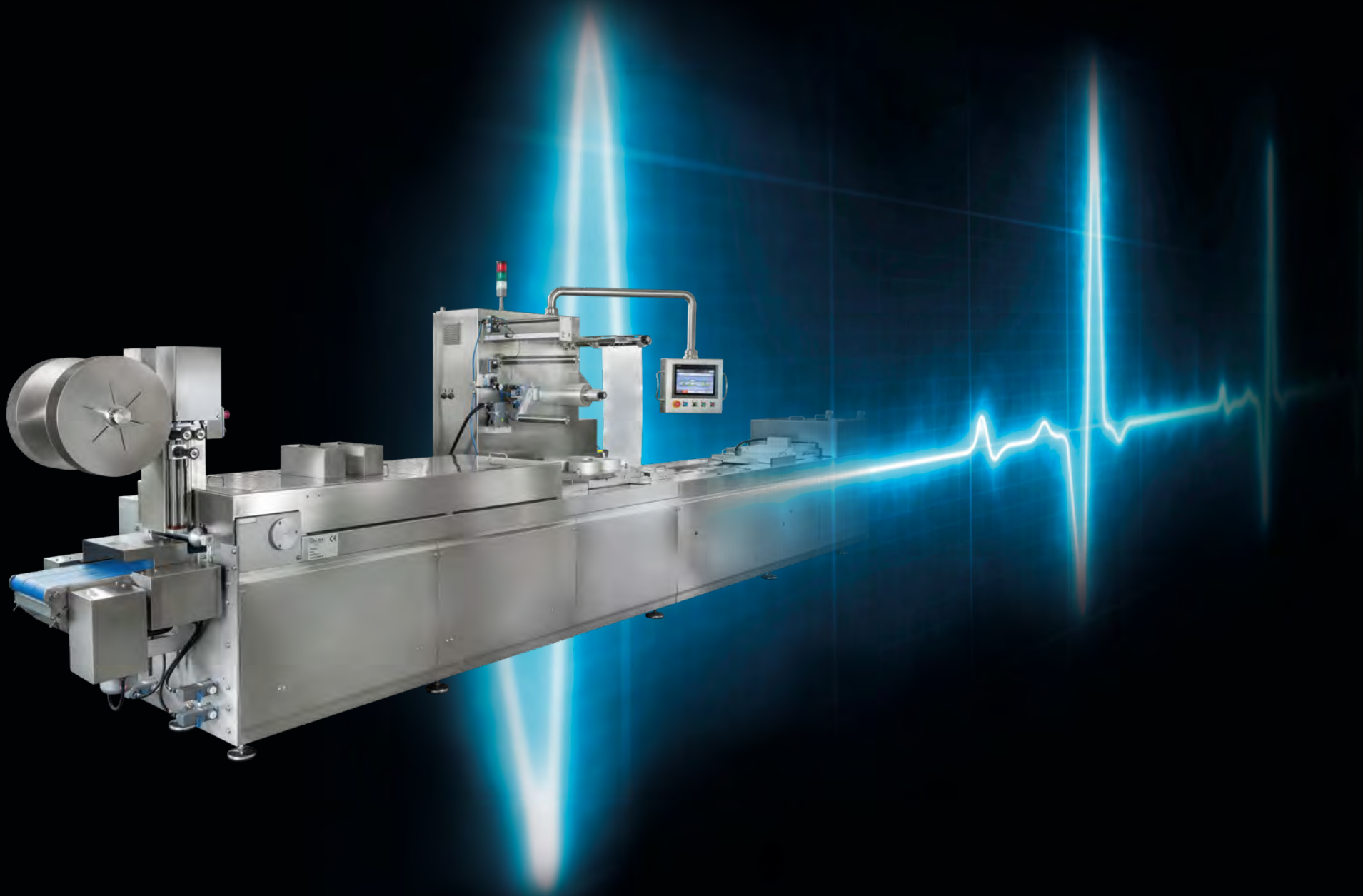
Gluten-free soft and durum wheat

People with coeliac disease cannot eat products containing gluten, i.e. all wheat-based products. However, through the use of NGT, durum wheat and soft wheat lines without gluten genes have recently been selected. Consequently, they are virtually devoid of the gluten fraction that contains the traits that trigger the autoimmune response typical of coeliac disease, so theoretically they can meet the dietary needs of coeliac subjects (Sanchez-Leon et al 2017, Yu et al 2024).

Soft wheat with reduced free asparagine content in the grain

Free asparagine in the grain – and therefore in flour – acts as a precursor to acrylamide in bakery products, and acrylamide is a carcinogenic compound regulated at the European level; for this reason, the level of free asparagine is becoming an objective of genetic improvement in soft wheat. Recently, a British research group used NGT to mutate one of the 5 wheat genes that encode asparagine synthetase, thereby reducing the free asparagine content in the grain. The plants selected after NGT application present a 50% reduction in free

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asparagine (data also confirmed in field trials, Kaur et al. 2024).

Conclusions

This brief overview serves to underline how genetic innovation – once essential for boosting production and guaranteeing food security – can now serve as the driving force behind a qualitative revolution capable of improving the nutritional properties of bread and pasta.

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3



Navigating the new reality: insights and trends shaping the European foodservice market in 2024

Matteo Figura
Circana



From the 2025 Pastaria Festival, a Circana analysis on the future of foodservice in Europe, exploring evolving consumption patterns, digitalization, and new social dynamics.

As the European foodservice industry moves through 2024, it finds itself at a crossroads shaped by evolving consumer behaviors, economic pressures, and the lasting impacts of the COVID-19 pandemic. A comprehensive analysis of recent data from CREST and Circana reveals a complex landscape where spending patterns, visit frequencies, and product preferences are shifting in nuanced ways. Understanding these trends is crucial for operators, suppliers, and stakeholders aiming to thrive in this dynamic environment.

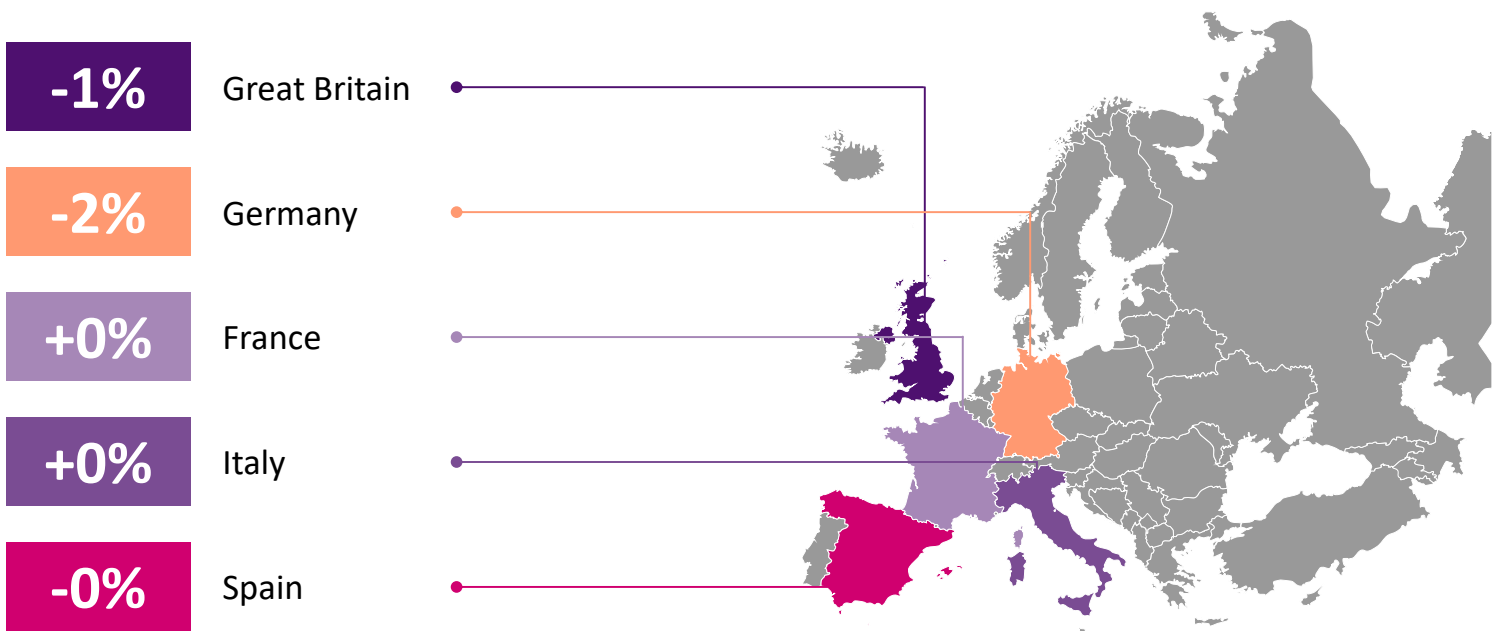
The post-pandemic foodservice landscape: a changed industry

The COVID-19 pandemic fundamentally altered how people work, socialize, and consume food. Remote work has become a permanent fixture for many, reducing the traditional lunchtime rush at office-based foodservice outlets. The industry has adapted, but the structure of consumer spending and visits has transformed significantly compared to pre-pandemic times.

While total foodservice spend has rebounded to pre-COVID levels, the composition of that spend has changed.

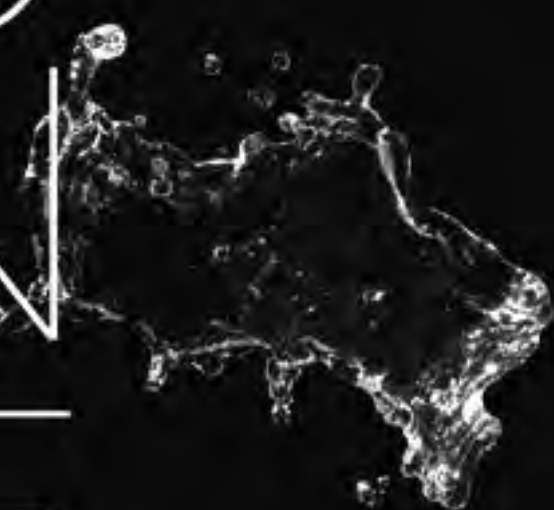
Visit Trends by Country – 2024 vs 2023

But all countries are suffering visit declines and the spend increases are solely a function of growing eater checks.





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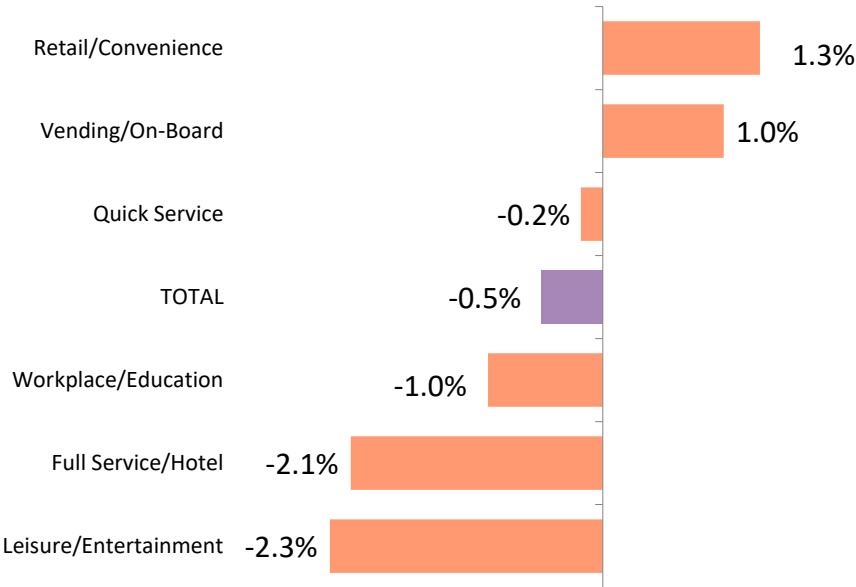


  
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Trends by Megasegment

Only the Retail and Vending Sector can continue to grow visits, all other segments, especially the On-Premise orientated ones started struggling in 2024.



There is a marked increase in off-premise consumption, driven largely by more meals eaten at home and a surge in digital ordering. Quick Service Restaurants (QSRs) have emerged as clear winners in this new reality, benefiting from their ability to serve customers via delivery, drive-thru, and pick-up options. Their price points also resonate well amid the ongoing cost-of-living crisis, making them a preferred choice for many consumers.

Spending more, visiting less: the paradox of 2024

One of the most striking trends in 2024 is the paradoxical relationship between visit

frequency and consumer spend. Although the number of visits to foodservice outlets has softened, overall consumer spending continues to grow. This growth is primarily driven by higher checks — the amount consumers spend per visit. Price inflation plays a significant role here, with prices rising by approximately 7.8%. However, consumers are not simply accepting higher bills passively. They are actively managing their spending by reducing the number of items they purchase during each visit and trading down to more affordable segments when possible. Despite these cost-saving behaviors, there remains a strong appetite for premium products,



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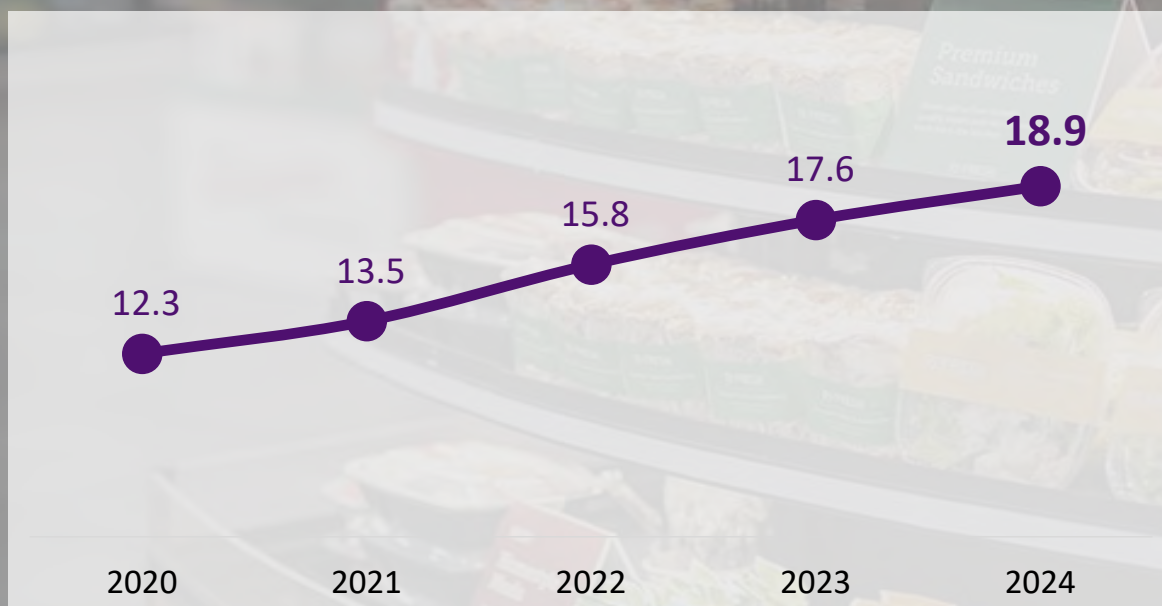


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3

indicating a complex balancing act between value and quality.

Segment-specific dynamics: winners and losers

The foodservice market is not monolithic, and different segments are experiencing divergent fortunes. Retail and vending sectors continue to see growth in visit numbers, benefiting from convenience and accessibility. Conversely, traditional on-premise dining venues such as full-service restaurants, hotels, leisure, and entertainment locations are facing declines in foot traffic. The weight of channels other

than commercial foodservice currently attracts 23% of total visits in Europe.

This shift underscores the changing nature of socializing and dining out. The social function of foodservice has grown in importance, but the reasons for visiting have evolved. Consumers are less motivated by functional visits—such as grabbing a quick lunch near the workplace—and more by social and experiential occasions. Operators must therefore rethink their value propositions and service models to align with these new consumer motivations.



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Consumers appreciate the ability to order at their own pace, skip payment lines, and customize their orders digitally. These innovations not only improve customer satisfaction but also drive operational efficiencies for foodservice providers.

Looking ahead: future perspectives

As the European foodservice market continues to evolve, several key themes will shape its trajectory:

- *adaptation to price sensitivity*: operators must balance the need to maintain margins with consumers' growing price consciousness, employing strategies such as menu engineering and value offerings
- *premiumization amid cost pressures*: despite economic challenges, there remains a demand for premium products, suggesting opportunities for differentiation through quality and innovation
- *embracing off-premise and digital channels*: the shift toward off-premise consumption and digital ordering is likely to persist, requiring ongoing investment in technology and delivery infrastructure
- *reimagining social experiences*: foodservice venues must innovate to meet changing social motivations,

creating environments and offerings that foster meaningful connections

- *leveraging data for strategic decisions*: continued use of advanced analytics will be essential to anticipate consumer needs and respond swiftly to market changes.

Conclusion

The European foodservice market in 2024 is characterized by a delicate balance of challenges and opportunities. While economic pressures and changing consumer habits present hurdles, they also drive innovation and adaptation. Operators who harness data insights, embrace digital transformation, and remain attuned to evolving consumer preferences will be best positioned to succeed in this new reality.

As the industry moves forward, understanding the interplay between spending patterns, visit behaviors, and product trends will be critical. The future belongs to those who can navigate complexity with agility, delivering value and experience in equal measure.



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Thanks to Italpast, Mulino Val D'Orcia consolidated its position as a leader in the artisanal pasta market, effectively responding to the growing request for high quality, authentic, and genuine products.

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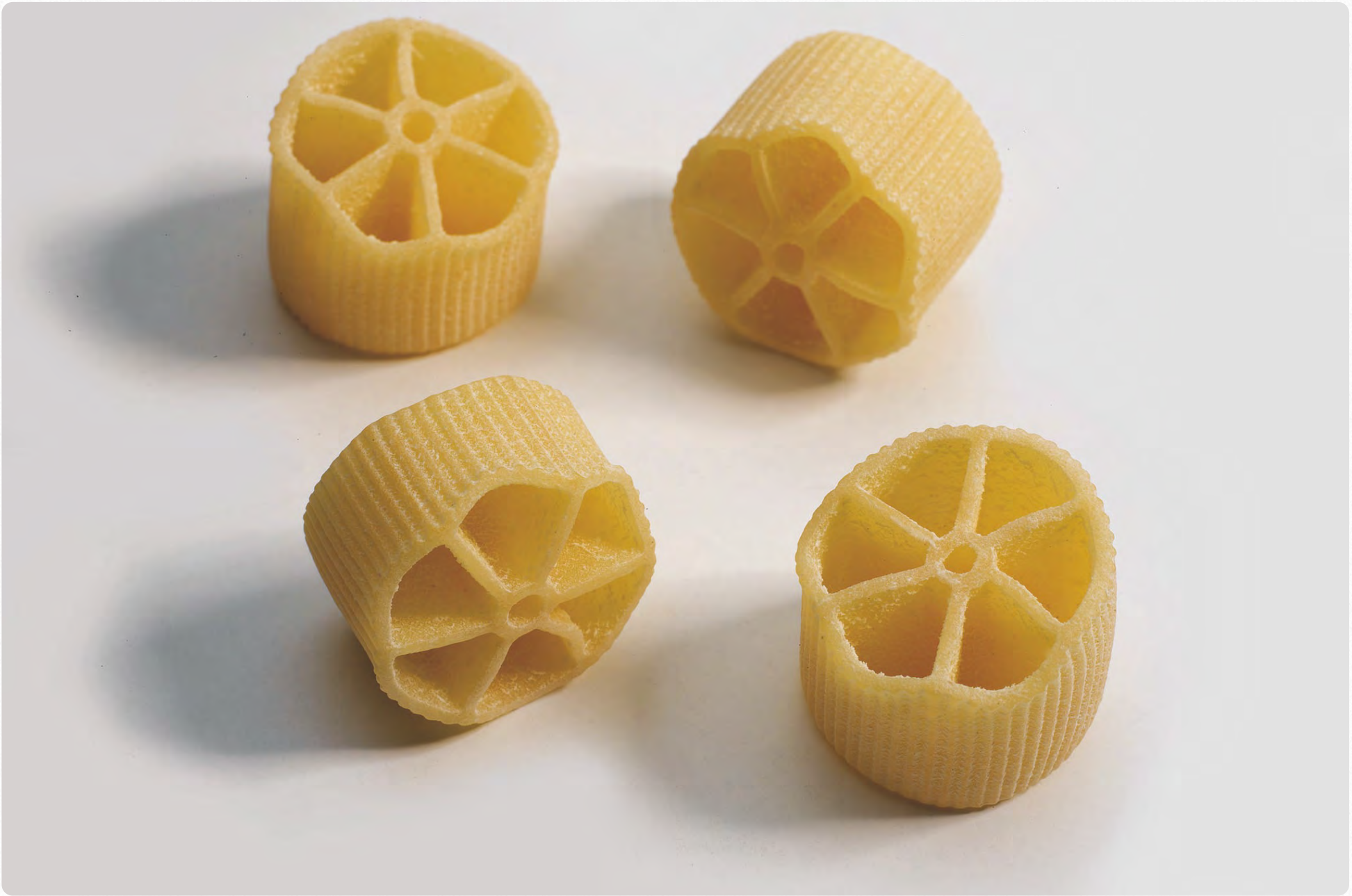


4



From tradition to the future: the heart of the pasta world beats in Istanbul

Press release



World Pasta Day 2025 will bring together flavor, culture, and innovation in Istanbul for the third time.

World Pasta Day Returns to the Istanbul stage for the third time, October 24–26

The Association of Turkish Pasta Manufacturers (TMSD) and the Pasta Manufacturers and Industrialists Association (MÜSAD), under the umbrella of the International Pasta Organisation (IPO), proudly announce that World Pasta Day 2025 will be held in Istanbul on October 24–26, 2025.

First proposed by Türkiye in Rome in 1995, the idea of World Pasta Day was formalized in 1997 and celebrated for the first time in Naples in 1998. Since then, it has traveled the world every year, hosted by different countries. After its successful editions in 2008 and 2013, Türkiye will

welcome the global pasta sector to Istanbul for the third time.

Theme: from tradition to the future

Durum wheat, born on the fertile soils of Anatolia, has been a cornerstone of human nutrition for over ten thousand years. This year's theme highlights this deep-rooted heritage while looking ahead to the future—focusing on pasta's healthy, innovative, and sustainable dimensions. Participants will include pasta associations from 15 countries, leading producers, technology providers, academics, world-renowned chefs, gastronomy experts, and international media representatives. For three days, Istanbul will not only be a host but the beating heart of the global gastronomy scene.

The logo for Pastaria Hub features the word "PASTARIA" in a bold, white, sans-serif font, followed by "HUB" in a similar font. The text is partially enclosed by a white square frame that is open on the left side. A horizontal white line is positioned below the word "HUB".

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DÜNYA MAKARNA GÜNÜ **WORLD PASTA DAY**

 **24 - 26 Ekim / October, 2025**

 **Conrad Istanbul Bosphorus**



Istanbul

#dünyamakarnagünü2025
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The heart of the pasta world beats in Istanbul

Gastronomy, culture, and business will come together in this unique city where history meets the future.

Istanbul is not only one of the world's most remarkable cities for its history but also for its culinary richness. With its cultural and gastronomic heritage, the city is once again ready to take the global stage in 2025. Having twice hosted World Pasta Day with great success, Istanbul has already proven its strength as a trusted host. Now, for the third time, it is preparing to become the center of the pasta world. Balancing its glorious past with its forward-looking dynamism, Istanbul continues to welcome global organizations of great significance. World Pasta Day 2025 will embody this spirit—bringing together gastronomy, culture, and business at one shared table.

Strong messages from industry leaders: pasta as Türkiye's pride

M. Aykut Göymen, Chairman of TMSD: "Türkiye is today the world's third-largest pasta producer and the second-largest exporter. This success is not only due to our production capacity but also to our investments in modern technologies,

innovation, and R&D. Hosting World Pasta Day 2025 in Istanbul once again is a source of pride for us, as it showcases the strength of our sector and highlights our country's capability as a global host.

This year, we are delighted to organize the event jointly as TMSD and MÜSAD under the umbrella of the International Pasta Organisation (IPO). This powerful collaboration strengthens the international reputation of the Turkish pasta sector and increases our visibility in the global food market.

Turkish pasta is already trusted worldwide for its quality and diversity, but we are also shaping the future with new production techniques, healthy product lines, and eco-friendly packaging solutions. We want to show that pasta is not only a strong cultural heritage but also an essential part of technological transformation.

This gathering in Istanbul will highlight the innovative aspects of our sector while also offering participants an unforgettable experience with Türkiye's renowned hospitality and gastronomy culture. For us, World Pasta Day 2025 is not only a celebration but also a platform where the food vision of the future will be discussed, new international collaborations will be forged, and pasta will continue to build bridges across cultures.

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Aykut Göymen, Chairman of TMSD



We are confident that this major event will once again demonstrate Türkiye's production power and hosting capacity, and we warmly invite all sector stakeholders to join us in Istanbul."

Nihat Uysallı, Chairman of MÜSAD:

"Every year, World Pasta Day is celebrated in a different country under the leadership of the International Pasta Organisation (IPO). This year, we are honored to host the event in Türkiye through the joint efforts of MÜSAD and TMSD.

Bringing together producers, suppliers, academics, and decision-makers, this meeting is of great importance not only for our sector but also for the future of the global pasta market.

Türkiye ranks third in pasta production and second in exports. Combined with being

the homeland of durum wheat and with our advanced production facilities, this gives Turkish pasta a unique position in the world market in terms of both quality and potential.

As MÜSAD, we see this event not only as a celebration but also as a significant step that will strengthen Türkiye's claim to leadership in the global food market. We believe that World Pasta Day will strongly showcase our country's position in the sector while also unlocking our potential. We invite all our stakeholders to this valuable gathering and hope, through collective wisdom and collaboration, to shape the future of the pasta industry together."

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Nihat Uysallı, Chairman of MÜSAD

A \$2 billion industry: where economy, culture, and sustainability meet at the table

Economic strength

Today, Türkiye is not only a key player in its own kitchens but also one of the most important actors of pasta on a global scale. With an annual production capacity of approximately 2.2 million tons, it ranks as the third-largest producer and second-largest exporter of pasta. Exporting to 174 countries, the industry

provides employment for 50,000 people and generates an economic value of \$2 billion. This makes Türkiye not just a producer but also a vital contributor to global food security.

Cultural heritage

Anatolia is the homeland of durum wheat. This journey, which began in the fertile lands of Karacadağ, has evolved over thousands of years into a universal culture that now brings millions of tables together. Pasta represents far more than just a dish: it is a value that builds bridges between cultures and creates a common language around the table.

Sustainability

Pasta holds a special place among the foods of the future, standing out with its low environmental impact:

- Wheat cultivation and pasta preparation save water.
- It has a low carbon footprint and is climate-friendly.
- Its ability to be prepared with leftover ingredients helps prevent food waste.

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More than an event: three days of inspiration, knowledge, and connections

World Pasta Day 2025 will be filled with special recipes from chefs, academic panels, networking opportunities, and unforgettable tasting experiences.

Why you should join:

- *Get inspired*: Rediscover pasta through the recipes of world-renowned chefs.
- *Gain knowledge*: Learn about health, nutrition, and innovation trends.
- *Build connections*: Open doors to international collaborations.
- *Experience*: Enjoy tastings, interactive sessions, and networking opportunities throughout three unique days.

World Pasta Day 2025 will not just be an event but a cultural bridge, a global showcase for the industry, and an unforgettable gastronomic experience.

More information

For more information and to register for the event, please visit:
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5



FIBRA R15: the clean-label innovation that optimises the use of ricotta in industrial food fillings

Editorial team



From I.T.ALI. a natural, cost-effective and stable solution to reduce costs and standardise the quality of ricotta in fresh filled pasta production processes.

I.T.ALI. presents FIBRA R15, an innovative semi-finished product designed to meet the needs of industrial manufacturers who use ricotta as a basic ingredient in their preparations.

As is well known, ricotta is subject to considerable fluctuations in quality, availability and price, which can compromise the continuity and efficiency of production. Hence, the creation of FIBRA R15: a completely clean-label product, developed from vegetable fibres and whey, which exploits the combined action of its natural components to ensure standardisation, yield and keeping costs down.

With FIBRA R15 it is possible to obtain a compound with a consistency and appearance similar to ricotta, simply by mixing it with water at a ratio of 1:5. This preparation allows up to 50% ricotta to be substituted in the filling, while still maintaining the organoleptic characteristics of the finished product. Its neutral flavour and milky appearance make it ideal for all types of preparation, combining particularly well with cheeses, vegetables, spices and other ingredients, and improving the stability of dough.

The operational advantages are numerous:

- reduced raw material costs (the mixture of FIBRA R15 and water costs less than 1 euro per kg);
- less loss of liquid and therefore better processing yield;
- no stickiness during production and no changes to production parameters;
- storage at room temperature.

FIBRA R15 is I.T.ALI.'s practical response to the needs of an ever-changing, highly competitive sector that seeks maximum production efficiency and attention to product quality.

For further information

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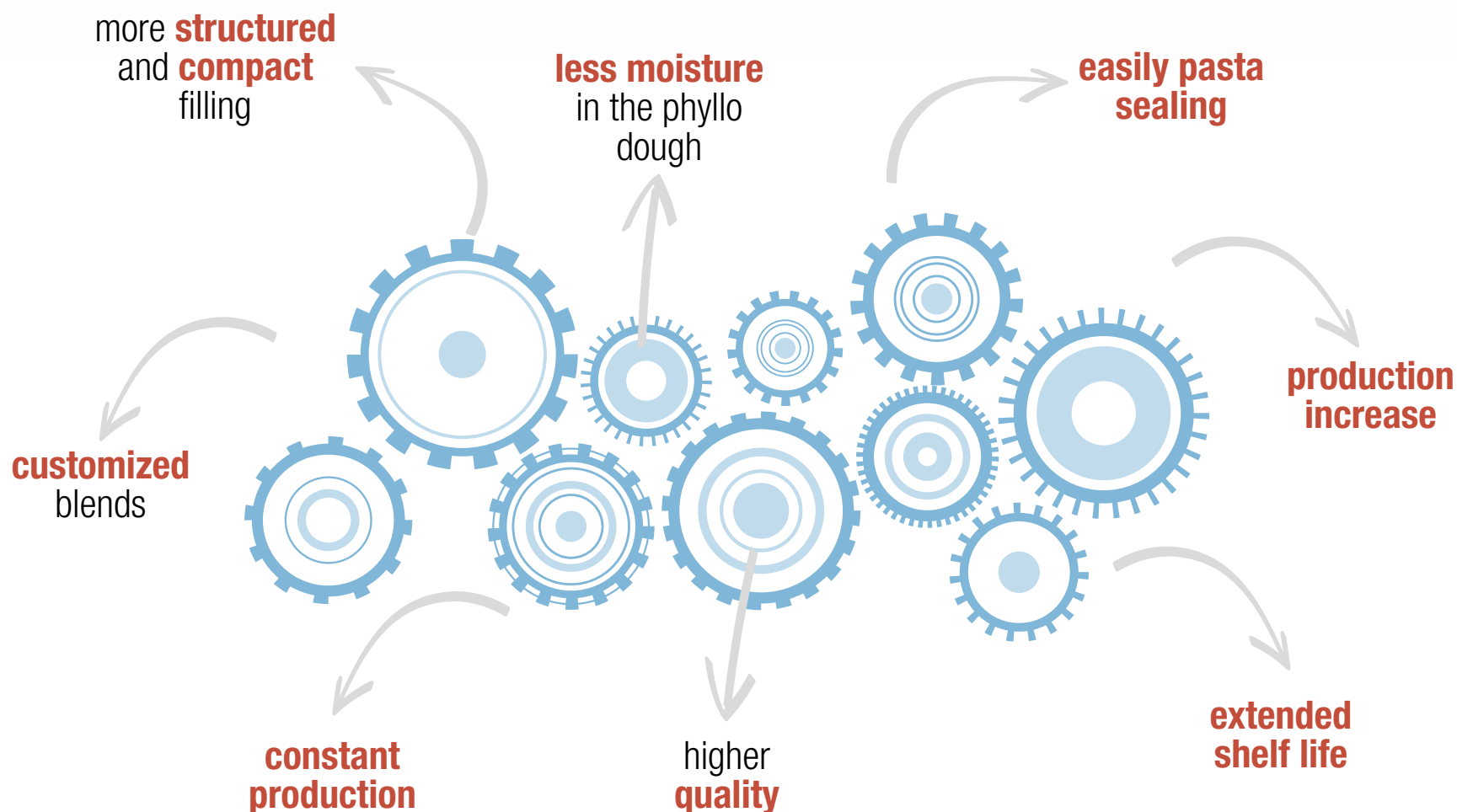
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Filled pasta and Prosciutto di Parma

Lino Vicini

PDO: when protection is guaranteed by the Court



A court case clarifies the risks for fresh pasta producers in the use of PDO ingredients: the importance of correct labelling, traceability and compliance with protection standards.

The experience of court proceedings is useful for understanding the risks that operators face if they fail to comply with the regulations protecting food products.

In the case discussed below, we will focus on the sensitive issue of products protected under the Protected Designation of Origin (PDO) status when used as ingredients in the production of filled pasta.

The case

Officers of the Carabinieri Command for Agri-food Protection, assisted by Inspectors of the Parma Ham Consortium (Consorzio di Tutela del Prosciutto di Parma), carried out an inspection at a pasta factory.

The specific focus of the inspection was the raw materials used in the production of filled pasta (cappelletti) which, in this particular case, listed “Prosciutto di Parma” among the ingredients.

Hence, the investigation focused its attention on the boneless cuts of ham used in the production of the cappelletti.

Inside the facility, several skinned and vacuum-packed cured hams were found, but none displayed the mark of the “Ducal Crown” that distinguishes Prosciutto di Parma PDO.

Hence the allegation of having used a product which did not display the official mark because it was produced under conditions and procedures that were not in compliance with those prescribed by the law governing the protection of Prosciutto di Parma.

According to the supervisory authorities, only hams bearing the “Ducal Crown” mark and the producer’s identification code can be legitimately labelled as Prosciutto di Parma PDO – irrespective of product presentation (bone-in, deboned, or in cuts)

In absence of the official mark on the cuts found, the product was not entitled to bear the name “Prosciutto di Parma”.

Consequently, the officers proceeded with a criminal seizure, pursuant to Article 354 of the Code of Criminal Procedure, of the vacuum-packed cuts

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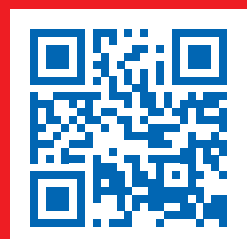
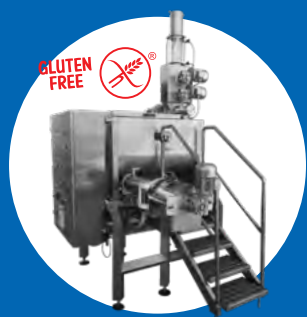
Nowadays, the needs in pasta factories are ever greater: production plants must be more compact, easily washable and highly efficient.

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of ham, on the grounds of suspected violations of multiple provisions of the Criminal Code

In particular, according to the officers, there had been a violation of the provisions of Article 515 of the Criminal Code (commercial fraud) 517 bis of the Italian Criminal Code (aggravating circumstances involving food or beverages whose geographical designation of origin is protected) and 517 quater of the Italian Criminal Code (counterfeiting of geographical indications or designations of origin of agri-food products) all in relation to Articles 24 of Italian Ministerial Decree No. 253 of 15 February 1993 and 6, par. 1 of Italian Law No. 26 of 13 February 1990 on the protection of the designation of origin of “Prosciutto di Parma”.

The process

Following a direct summons to trial before the Single-Judge Court, the CEO and legal representative of the pasta factory – where cappelletti filled with Prosciutto di Parma were being produced – was indicted.

As mentioned above, the charges brought by the public prosecutor concerned the violation of multiple criminal provisions. Let us examine them together to understand the subject matter of the dispute.

Article 515 of the Italian Criminal Code protects the fair and proper conducting of business; it is an endangerment offence punishable by imprisonment of up to two years or a fine of up to €2,065.

Seller dishonesty and commercial malpractice are particularly penalised. The punishable conduct involves the delivery to the purchaser of a movable good that differs from the one contractually agreed. The subjective element required to constitute the offence is generic intent. The latter takes the form of the consciousness and intention on the part of the offender to deliver something other than that declared and agreed upon, which requires the awareness of perpetrating a deception of the purchaser.

Article 517 bis of the Italian Criminal Code provides for an aggravating circumstance in the event that the commercial fraud concerns foodstuffs whose designation of origin is protected.

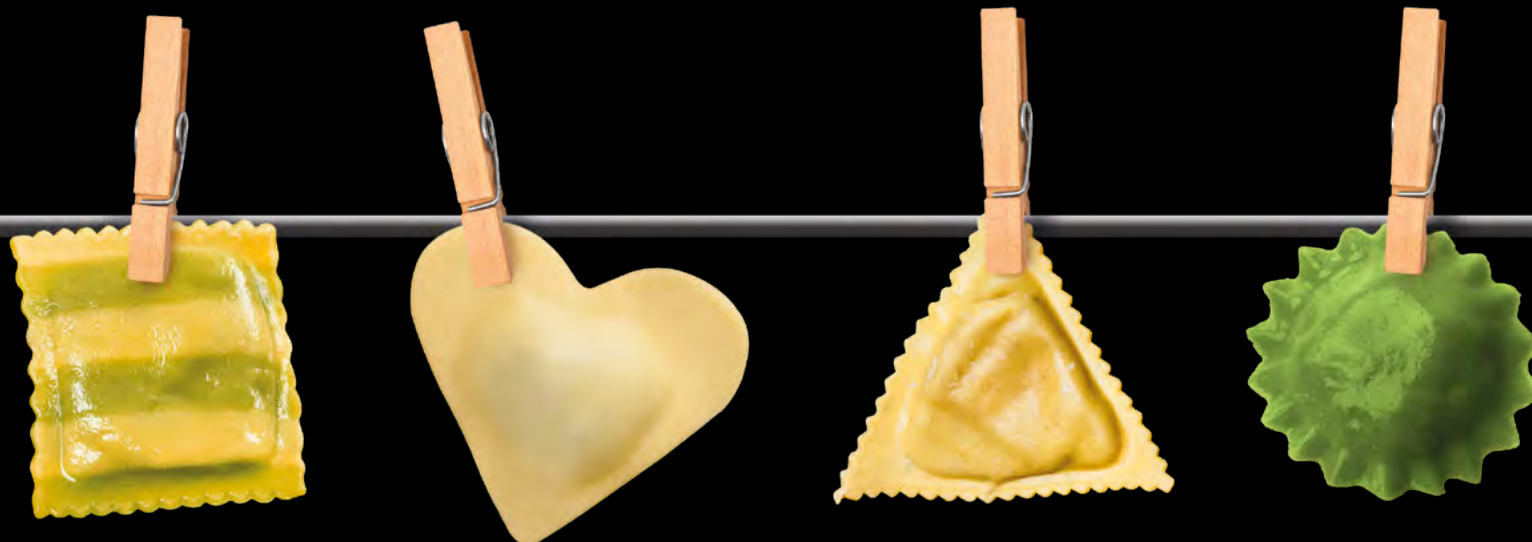
Finally, Article 517 quater of the Italian Criminal Code punishes the counterfeiting of geographical indications or designations of origin of agri-food products.

The penalty is imprisonment of up to two years and a fine of up to €20,000.

This offence was introduced into the Italian Criminal Code by Italian Law No. 99 of 23 July 2009, which protects consumer trust in the origin and quality of certified

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agri-food products, as they are subject to specific regulations and safeguards concerning their geographical origin.

This is an endangerment offence punishable under the category of general intent.

According to the prosecution's argument, the absence of the "Ducal Crown" mark – required under Italian Law No. 26 of 1990 – on the cuts of ham determined the loss of at least one essential quality of the product: its traceability, which would otherwise allow the consumer to be properly informed about the product.

It followed from this logic that the use of the name "Prosciutto di Parma" for cuts that did not bear the PDO mark meant declaring the existence of qualities that did not in fact exist, even if the original ham was genuine.

Against this reconstruction, the defence documented that it had purchased the Parma ham cuts from a producer belonging to the Consortium for the protection of this very PDO product.

The cuts had been used to make the filling of fresh pasta marketed under the name of the renowned PDO product.

These statements were confirmed by the documentation produced, which demonstrated that the seized batches of ham unequivocally belonged to a

protected product, thereby ruling out any hypothesis of fraud.

In the light of the evidence provided by the prosecution – which always bears the burden of proving the defendant's responsibility – and the elements submitted by the defence, the court ruled to acquit the cappelletti producer of all charges.

This was the line of reasoning followed by the Judge.

The trial did not yield sufficient proof that the producer had committed the offences under dispute.

Recalling the position expressed in the past by the Court of Cassation, the Single Judge held that the lack of the distinguishing mark for reasons inherent in the splitting into cuts of the initial regularly marked piece is not sufficient to transform a violation of the rules governing the splitting and packaging of marked goods into a criminal act pertaining to commercial fraud.

Indeed, with regard to food products, the special regulations that protect, by way of administrative protection, the quality of the product, concur, in cases where food products lacking the required characteristics are marketed as "PDO" items, with the incriminating provisions of Articles 515 and 517 of the Italian Criminal

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Code, aimed at protecting the fair exercise of trade and the interest of the consumer. The possible violation of the administrative regulations on the splitting of the PDO ham into batches does not, however, constitute a criminal offence.

In fact, the prosecution was unable to prove that the seized batches did not come from Prosciutto di Parma legs, so the acquittal had to be declared with the broader formula “because the fact does not exist”.

Final considerations

This case, which ended well for the fresh pasta producer, demonstrates the care that must be taken in the selection of raw materials and ingredients to be labelled. In fact, supervisory authorities are increasingly focusing their activities on

verifying the sources of supply, particularly when PDO products are used.

It follows, therefore, that non-compliance with the regulations on geographical indications or designations of origin can lead to serious consequences in the event of an inspection by the PDO protection bodies.

In the most serious cases, the Judge may even rule to close the factory or business where the offence was committed.

These serious consequences are often accompanied by significant reputational damage that may even exceed the impact of the principal sanctions imposed by the court.

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7



Pastaria Award 2026: recognizing the best theses on pasta

Editorial team



A well-established event that highlights academic research applied to pasta production.

Pastaria has always supported dialogue between academia and industry, creating opportunities to highlight young researchers and promote innovation in the pasta production chain. In this spirit, the Pastaria Award was launched by Kinski Editori and returns for a new edition, looking ahead to 2026 with renewed momentum.

The award is reserved for the best master's and doctoral theses focused on applied research in pasta production. This initiative has already allowed numerous young scholars to see their work recognized and presented to a qualified audience of professionals, helping bridge the gap between university laboratories and businesses in the sector.

The 2026 call for entries includes two €400 prizes for the best master's theses and one €700 prize for the best doctoral thesis, in addition to official diplomas issued by Pastaria. There will also be special mentions, each with a €150 award, dedicated to works that, while not selected as winners, are deemed particularly deserving by the committee.

Eligible participants are master's graduates and PhDs who earned their degree between July 2023 and November 2025 in scientific, technological, or biotechnological fields related to the food industry: from biology to biotechnology,

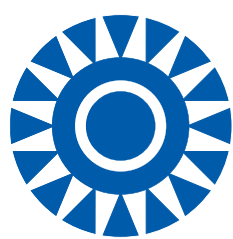
from chemical and pharmaceutical sciences to nutrition, including agricultural and food sciences.

Applications, complete with thesis and a summary in the form of a scientific article, must be submitted by November 30, 2025, to the email address info@pastaria.it.

Application forms and the full regulations are available [here](#).

Entries will be evaluated by a committee chaired by the editor-in-chief of Pastaria and composed of qualified university professors. The winners will be announced by January 31, 2026, and the award ceremony will take place during the Pastaria Festival, scheduled in Florence on March 30–31, 2026, alongside Fiera Pastaria.

With this initiative, Pastaria reaffirms its commitment to building a bridge between universities and businesses, offering young researchers not only financial recognition but also a valuable opportunity for visibility and dialogue with key players in the international pasta industry.



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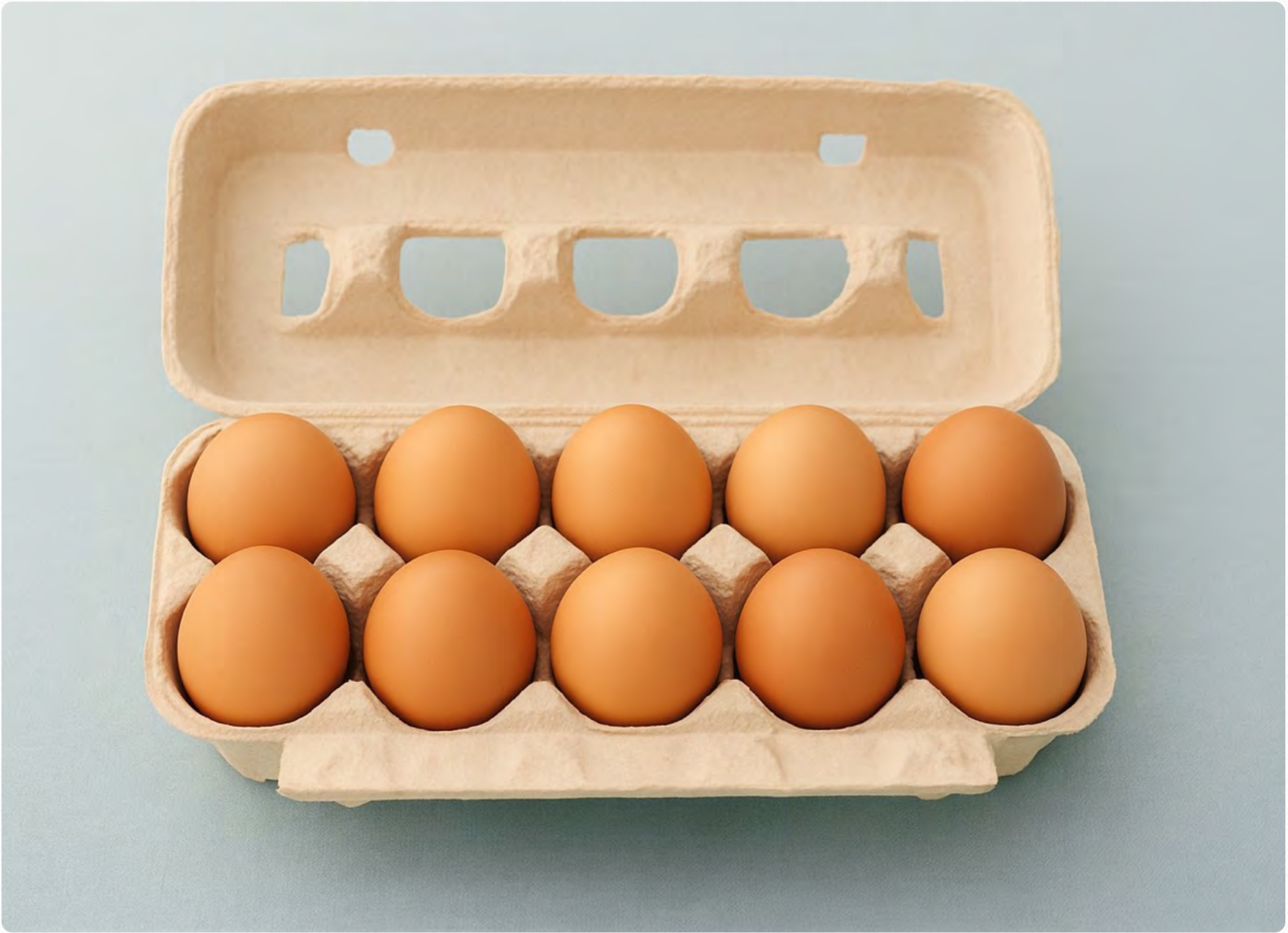
Piemonte Nord

8



Egg prices, the perfect storm

Pastaria Centre for
Economic Research



Avian flu, rising costs and ethical standards squeeze low-cost options. Sales are soaring: +7.8% year-on-year.

The number one culprit is the severe avian influenza epidemic that has, for the most part, struck US and European farms in recent years, also affecting some Asian regions and parts of Africa.

But there are also other reasons behind the sky-rocketing egg prices: from the rising costs of production and materials (and their impact on packaging) to logistical and distribution complications.

The issue of costs – and its resulting impact on prices throughout the supply chain from production to consumption – also underlies the transition process, with its consequent massive investments, marked by the progressive shift from caged farming systems to alternative methods, such as barn-raised, free-range and organic.

A rather rapid change dictated by the demands from consumers and large retailers for higher ethical standards; a phenomenon that has contributed to reducing the supply of low-cost eggs and pushing up price benchmarks.

Food inflation, which continues to weigh on household grocery bills, along with the effective loss of purchasing power among Italian families – due to only partial wage adjustments to the rising cost of living – have fuelled the demand for eggs, considered a relatively affordable and nutritious food, notwithstanding the price hikes. A significant substitution effect could be observed to the detriment of meat and fish, which were not spared by the inflationary wave. In this regard, it should be noted that NielsenIQ data, updated to the year ending June 2025, show a growth in egg sales at constant prices (i.e. in real terms) of 7.8% over the last twelve months. So a mix of factors – albeit with varying impacts and weightings – that has ignited the spark of price increases, still clearly visible today

Across the 27 EU Member States, the European Commission estimates – based on August data – a year-on-year increase of 31.2%. In Italy, where egg prices are among the highest in Europe, the year-on-year gap although less significant is still pronounced – at over 21%. In contrast, rises of around 50% were observed in France and Belgium and equally significant increases in the Netherlands and Poland.

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EGGS, MONTHLY AVERAGE PRICES (euro/100 kg)



Source: European Commission

The avian flu emergency, which, both in Europe and in the USA, is the most significant element among those examined and is primarily responsible for the exceptionally tense situation on the markets, has led to the slaughter of millions of animals, including many laying hens: hence the drastic reduction in the availability of eggs. Although a contingent factor, it has prolonged effects due to the time required to strengthen the biosecurity of the farms and rebuild poultry stocks. But with the risk of recurrence always looming, compounded by the objective difficulty faced by the health authorities in

controlling the infections caused by the seasonal migration of birds, considered to be the main carriers of the disease. The outbreak of Highly Pathogenic Avian Influenza (HPAI) in the United States is estimated to have led to the culling, in as many as 49 out of 50 states, of some 123 million chickens, hens, turkeys and other poultry species between 2022 and the end of last year. In Europe, 365 outbreaks of HPAI were reported in 24 countries between March and June 2025: 147 in poultry, 20 in birds raised in captivity and 198 in wild birds. According to the data elaborated by



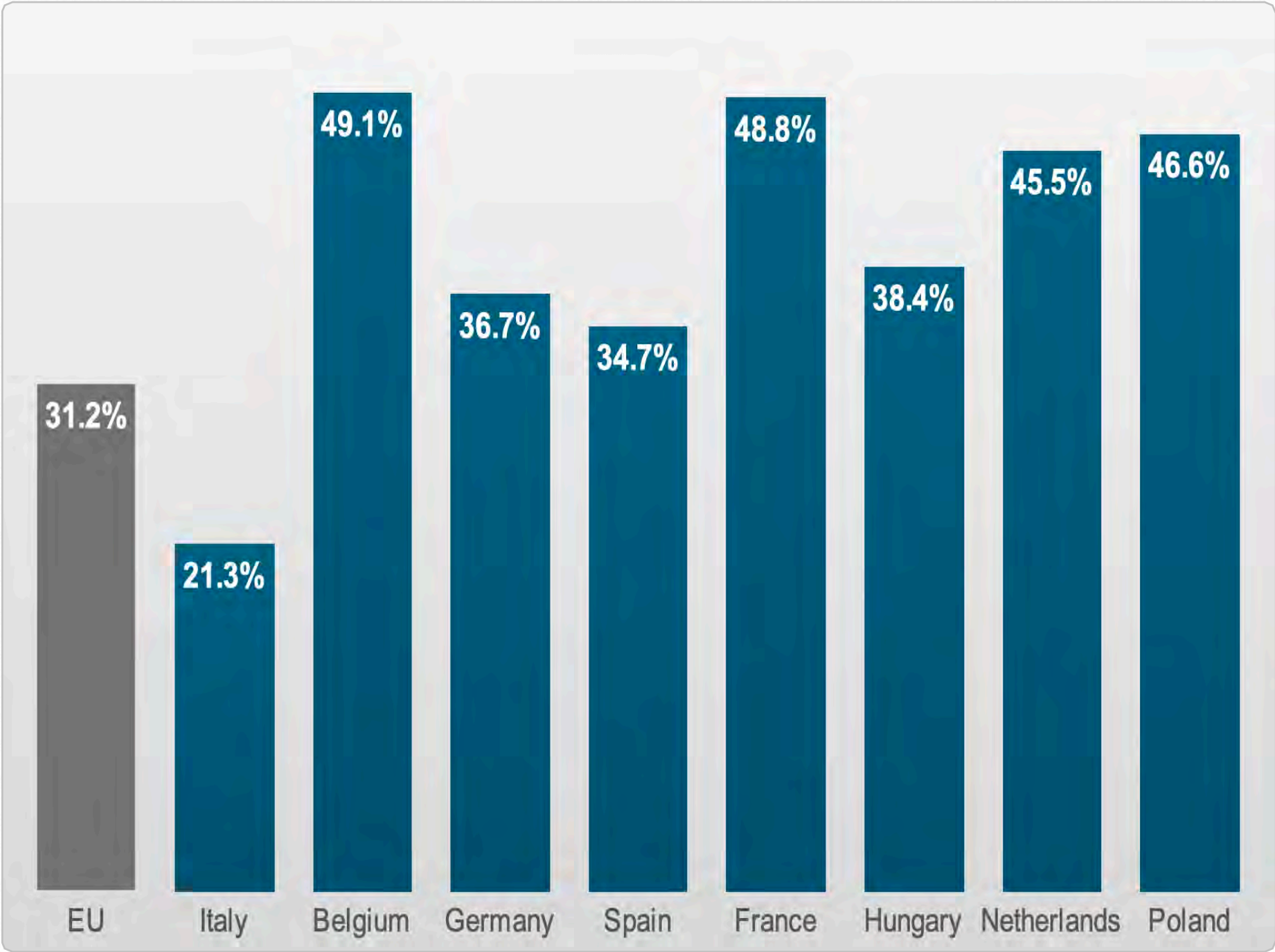
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EGGS, MONTHLY AVERAGE PRICES (variation August 2025/August 2024)



Source: European Commission

EFSA-ECDC, the European Centre For Disease Prevention And Control, the outbreaks in poultry have mainly affected ducks and chickens, with a high concentration in Hungary and Poland. In total, almost 8 million animals were slaughtered.

It is important to point out that the latest market trends reveal a divergence in price movements in the US and the EU. Across the Atlantic, the gradual rebuilding of the

poultry population in US farms, and imports mainly from Brazil, Honduras, Mexico, Turkey and South Korea, have closed the gap between the supply and demand for eggs, and significantly reduced prices from the spikes of last March.

On the other hand, prices have experienced renewed upward pressure, driven in part by strong demand for the preparation of confectionery, fresh pasta

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and other processed foods, against a backdrop of reduced availability.

The extensive spread of HPAI viruses in birds persists, according to EFSA analysts, especially in Central and Eastern Europe, with outbreaks still concentrated in Hungary and Poland and with some instances of cross-species transmission to mammals. The situation, with regard to cross-species transmission, is particularly critical in the USA where, between March 2024 and May 2025, virus outbreaks were confirmed in a thousand dairy farms in as many as 16 States.

With regard to market dynamics, it is important to point out that the European and American markets, are not affected by mutual interference, and, even in the most critical phases, only a few EU countries exported whole, unprocessed eggs to the States (among them Lithuania and the Netherlands). But these were minor movements, insufficient to change the balance and affect price trends on domestic markets.

Looking ahead, the European Commission expects egg production to increase by only a fractional +0.5% year-on-year, in the year-end statements. A modest increase that, at the continental level, may not be enough to stabilise the market. With demand still buoyant and supply struggling, prices could continue to rise,

albeit at a slower pace than in recent months. In Italy, the market may tend to stabilise, or maintain a slight upward trend. In August, prices on the Forlì marketplace reached levels close to the peaks of March-April 2023; barring shocks due to sudden changes in the health situation, conditions are expected to remain tense, but not deteriorate sharply.

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