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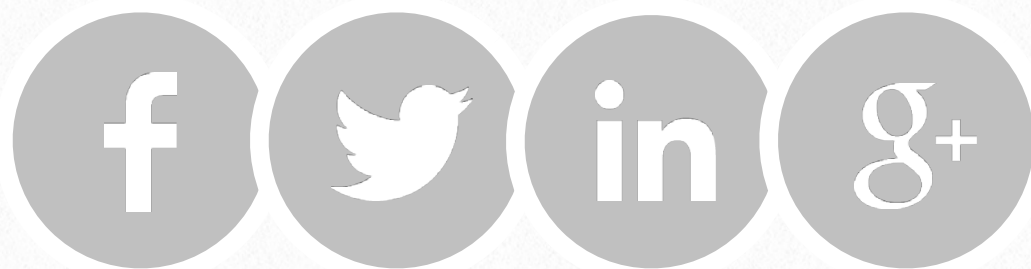
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1



Fiera Pastaria & Festival 2026: the international pasta community meets in Florence

Editorial team



The only event entirely dedicated to pasta producers and their suppliers returns to the Stazione Leopolda, on 30 and 31 March 2026.

After the success of the first edition, Fiera Pastaria & Festival returns in 2026 with an original format, bringing together in one major professional event the exhibition area dedicated to suppliers of pasta producers and the conference sessions – the cultural heart and forum of the sector. The event, organised by the trade magazine Pastaria, will be held on 30 and 31 March 2026 at the prestigious Stazione Leopolda in Florence, a venue that has become a symbol of Italian creativity and innovation.

Fiera Pastaria & Festival is the only international event entirely dedicated to the world of pasta, designed to facilitate meetings between pasta producers,

suppliers of technologies, ingredients and services, as well as offering two days of professional updates, networking, and high-level business matching.

A global gathering for the world's pasta makers

Admission to Fiera Pastaria & Festival is free, but reserved exclusively for Italian and international pasta producers, subject to registration.

For pasta makers, taking part means experiencing a unique exchange and training event, with the opportunity to meet the industry's leading suppliers, discover the latest technological innovations and



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exchange views with colleagues and sector leaders from all over the world. Over the two days, visitors will be able to attend Pastaria Festival sessions, which will feature conferences and round tables on topical issues such as research, sustainability, innovation and global markets, moderated by experts, university lecturers and researchers, institutions and trade associations.

A hub for the whole pasta supply chain

The exhibition part of the event will be dedicated to companies that supply machinery and equipment (processing and packaging), accessories, ingredients (from semolina and flour to semi-finished products for fillings) and services to pasta producers.

Exhibiting at Pastaria Fair & Festival means establishing direct contact with the decision-makers of pasta producers, in a highly qualified and exclusive setting. For suppliers seeking even greater visibility, corporate conferences or new product presentations can be organised within the extensive programme of the Pastaria Festival.

The Festival is, in fact, the ideal venue for sponsors to showcase their expertise, innovations and solutions to a select audience of pasta producers, through talks, round tables and dedicated presentations.

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The event is organised by Pastaria in collaboration with the most prestigious national and international associations of pasta producers, confirming the Festival's global mission and role as a platform for

meeting and dialogue for the entire industry.

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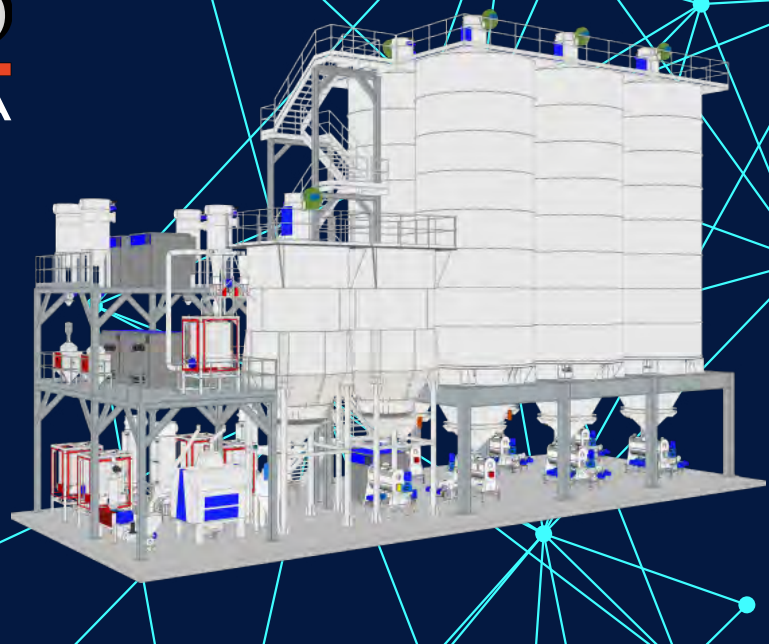


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2



Italian pasta in the crosshairs of the US: extra tariffs put 200 million in turnover at risk

Pastaria Centre for
Economic Research



Italian exports under pressure: the prospect of a triple-digit tariff rate alarms companies and institutions.

Italian pasta, a symbol even on American tables, finds itself at the centre of one of the most worrying trade disputes in recent years. In recent months, the US Department of Commerce launched an anti-dumping investigation involving several major Italian producers in the sector. And at the end of this preliminary investigation, Washington proposed introducing an extra customs duty that could raise the ad valorem tariff to 107%, with the real risk of upsetting the balance of current trade flows and making pasta a luxury product for American consumers, who are already facing income stability problems and rising inflation in their grocery basket.

The case stems from the accusation that some domestic companies were selling pasta in the United States at a price below its “normal value”, conduct that – according to the US authorities – has resulted in a form of unfair competition to the detriment of American producers. The companies involved contest the calculation methods adopted, claiming that they are operating in full compliance with international rules. But the fact remains that the investigation, initiated at the request of US industry, has led the Department of Commerce to calculate, for the companies under investigation, an anti-dumping duty of 91.74% on top of the existing 15% tariff in force since August. If confirmed, the measure would push many Italian companies out of the US market; faced with the prospect of a triple-digit customs duty, they are already evaluating whether to withdraw their products from grocery stores.

A decisive element of the dispute concerns the types of pasta involved, and perhaps only traditional dry pasta will, in fact, be affected. Products such as fresh pasta, egg pasta, organic pasta, gluten-free varieties and other specialty types would be excluded from these burdensome measures. The announcement does little to ease the blow for the key players, with the potential damage still likely to be devastating, given that dry pasta is by far the most important segment in exports to the United States, as highlighted by ISTAT data, which attribute to the segment an export turnover in the USA of 480 million in 2024. If 40% of this turnover were to be wiped out by the punitive tariff (with a tax of over 100%, abandonment of the market would



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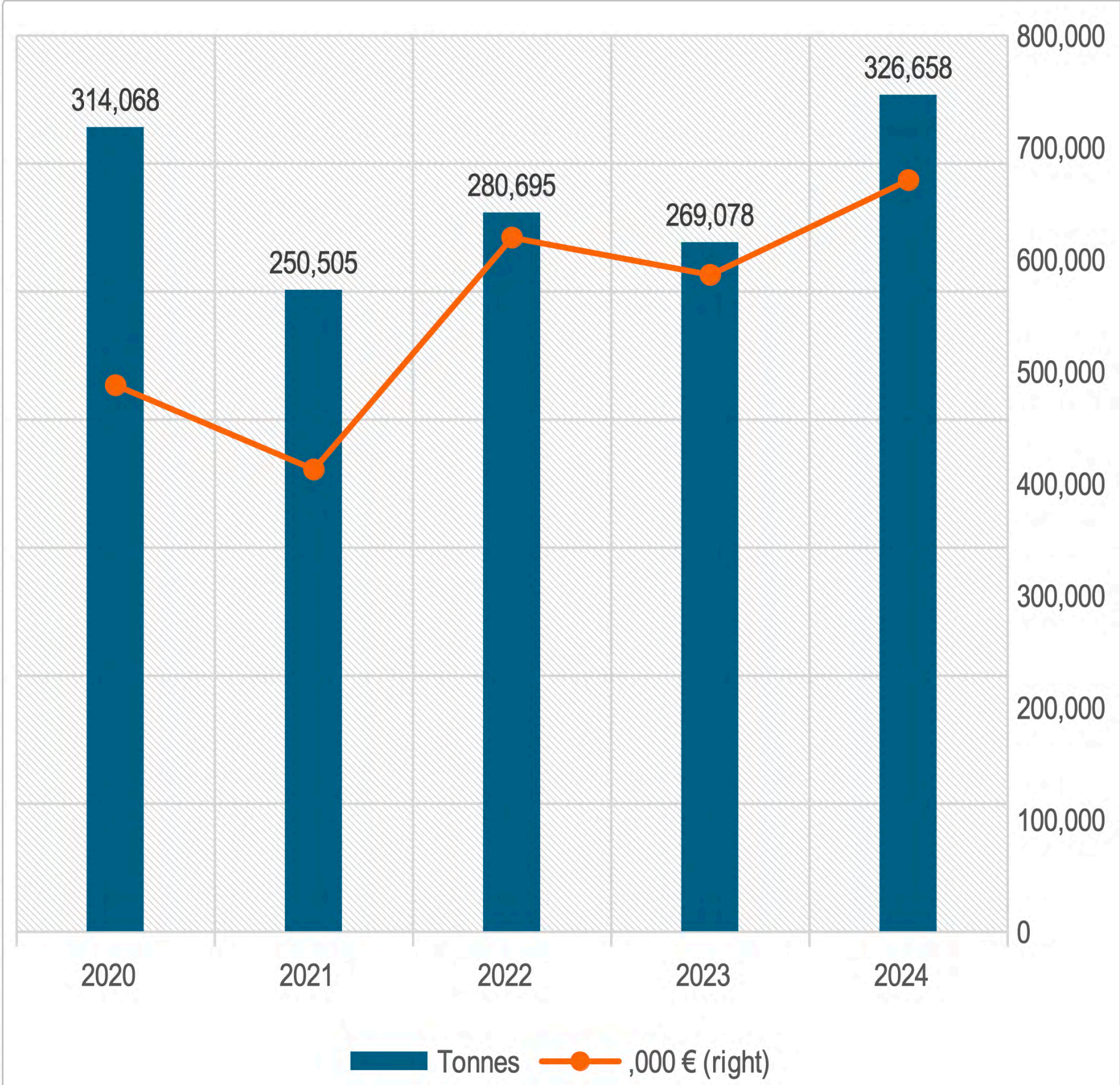
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Chart 1 PASTA, ITALIAN EXPORTS TO THE USA



Source: Istat

be widespread), the damage would amount to around 200 million. And this could well be a conservative estimate. It is not, however, clear to date what the timing will be, should the measure be

adopted. The Department of Commerce had initially indicated 1 January 2026. However, news has leaked from Washington of a likely postponement due to the government shutdown – the longest in



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Table 1 PASTA IMPORTS TO THE USA (.000 \$)

	2020	2021	2022	2023	2024
Total	1,264,218	1,124,309	1,440,344	1,493,833	1,750,640
Italy	488,601	443,061	596,558	597,128	682,973
South Korea	134,354	137,451	147,769	191,498	271,145
Canada	130,151	121,224	159,940	170,248	172,700
China	120,274	103,251	124,057	99,076	109,892
Thailand	94,799	92,124	95,354	86,468	99,135
Mexico	35,077	26,912	55,250	73,222	69,540
Vietnam	42,421	27,279	39,427	38,933	59,618
Taiwan	40,099	27,356	36,405	48,343	58,541
Japan	37,443	34,388	33,642	32,435	35,206
Indonesia	11,477	6,838	14,810	14,463	33,465
Turkey	24,729	16,896	22,932	27,145	31,338
India	14,488	10,742	12,320	12,593	15,681
Greece	3,114	2,836	6,049	11,477	15,168
Egypt	1,939	2,278	1,238	3,739	8,553
France	7,936	5,560	6,201	7,087	7,389
Philippines	8,227	5,957	8,082	6,956	7,204
Germany	6,794	6,051	7,374	7,243	6,593
Guatemala	3,649	3,083	5,052	5,160	6,029
Singapore	4,820	5,861	6,209	6,038	5,638
Costa Rica	2,138	1,396	2,878	4,744	5,405
Brazil	2,485	1,435	3,697	5,169	4,759
Others	49,203	42,330	55,100	44,668	44,668

Source: US Census Bureau

history – which lasted 43 days this year, freezing federal activities and leaving a backlog of approvals, inspections, paperwork, payments and unreleased data.

Although this possible postponement does not change the underlying scenario, it opens up a longer window of opportunity during which the Italian and European



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In 2020, Mulino Val D'Orcia decided to renew the partnership with Italpast, by installing a second plant to additionally increase the production, keeping unchanged the unique characteristics of raw materials.

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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Table 2 PASTA IMPORTS TO THE USA (TONNES)

	2020	2021	2022	2023	2024
Total	658,863	551,904	665,28	647,403	744,589
Italy	292,306	243,404	288,900	267,700	320,447
South Korea	41,677	42,411	44,899	49,851	62,312
Canada	59,099	47,298	55,602	61,063	62,112
China	62,820	57,761	64,978	55,245	59,407
Thailand	32,223	31,952	34,799	29,341	31,307
Mexico	40,463	30,976	51,247	61,057	53,536
Vietnam	15,844	11,721	16,866	14,280	18,995
Taiwan	13,557	9,096	11,259	12,534	14,683
Japan	11,510	11,105	12,459	12,086	14,075
Indonesia	5,360	3,182	5,107	4,483	9,793
Turkey	31,106	20,693	21,856	23,739	28,741
India	6,716	4,616	5,385	5,578	6,338
Greece	3,140	2,462	5,030	8,595	11,749
Egypt	3,145	3,785	1,600	5,322	13,211
France	2,858	2,163	1,836	1,733	1,823
Philippines	4,150	2,846	3,773	2,929	3,168
Germany	2,763	2,335	2,849	2,479	2,308
Guatemala	1,702	1,390	2,138	2,049	2,289
Singapore	1,079	1,339	1,211	994	952
Costa Rica	1,425	841	1,589	2,527	2,857
Brazil	3,196	1,157	3,159	3,729	3,470
Others	22,725	19,374	28,740	20,089	21,016

Source: US Census Bureau

authorities could step up diplomatic pressure and negotiate with their American counterpart to avert the most serious outcome. The European Union has already

made it known that it considers the US assessments unjustified, but the path is still uphill and all options are still on the table: from the worst case scenario, which would



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confirm Washington's current stance, to the intermediate one, which would lead the US authorities to revise the rate downwards, up to the hoped-for solution of a political agreement between the US and the EU that would avoid the punitive tax, while still urging reflection on the need to adopt more incisive strategies to diversify trade outlets. The topic has inevitably taken on political significance. The US market is the first non-European outlet for Italian pasta and the second worldwide after Germany. Any protectionist measure, but particularly a tariff increase of the magnitude announced, risks triggering chain effects throughout the entire supply chain, from durum wheat – the prices of which are already falling – to semolina and packaged pasta. At the same time, the United States is going through a particularly complex domestic phase, with a strong focus on defending domestic industry and a contentious political climate pushing for restrictive trade measures, encouraging reshoring (the return of relocated manufacturing activities to the home country) and investments on US soil by foreign companies.

In the meantime, industry fears that even the announcement of such high tariffs could dampen orders, weaken trade relations and generate a climate of uncertainty that is likely to last for many months. Even though the statistics do not yet appear to bear this

out. Between January and August this year, ISTAT recorded a growth in exports to the US of 6.7% in volume and 1.6% in turnover. For dry pasta alone, which accounts for over three quarters of transatlantic shipments, growth is 8.5% in real terms and 5.3% by turnover. Another important piece of evidence is the recovery of Italian pasta exports to the US after the pause in 2023. Last year, sales largely recovered the ground lost in the previous twelve months, with double-digit rebounds of 21.4% in volume and 14.4% in monetary terms. Across the Atlantic, Italy firmly holds its position at the top of the list of suppliers, accounting for 43% of US pasta imports (around 745,000 tonnes in 2024, according to US Census Bureau figures) and 40% of the corresponding value in dollars. At a considerable distance from Italy is South Korea, the second largest supplier (mostly of noodles), followed, in turn, by Canada, China, Thailand and Mexico. Over the past five years, pasta imports to the US have grown by 38% in value (+13% in volume), with the currency equivalent rising from \$1.26 billion in 2020 to \$1.75 billion in 2024. In terms of Italian pasta alone, imports from the US have increased by 40% in value, while quantities have grown at a more subdued pace than the general trend, rising by 10% over the five-year period.



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3



US tariffs on Italian pasta strike at the heart of “Made in Italy” excellence

Editorial team



Margherita Mastromauro, President of the Pasta Makers Group at Unione Italiana Food

Pastaria publishes an interview with Margherita Mastromauro (Unione Italian Food), who expresses strong concern regarding the anti-dumping measures proposed by Washington: “They are penalising a strategic industry and American consumers are being impacted as well”.

President Mastromauro, how do you view the US administration's decision to propose such high anti-dumping duties on Italian pasta?

It is a decision that worries us a great deal because it affects a substantial portion of the companies in our sector and hence a percentage of Italian pasta exports to the US that is likely to be over 50%. Let's not forget that the United States is the second largest market for Italian pasta exports, with a value of around €600 million. So it is a measure that strikes at the heart of a strategic sector for our national economy.

Washington claims that some Italian companies are selling pasta at lower prices than the domestic market. How well-founded are these accusations?

Allegations of dumping are not new. Anti-dumping duties on Italian pasta were introduced over 20 years ago, for the purpose of protecting US domestic production. But the scenario today is very different: the US produces about 2 million tonnes of pasta against a domestic consumption of 2.7 million. Italian imports only cover 300,000 tonnes. Added to this is a key fact: the shelf price of pasta in the US can be up to four times higher than in Italy. The claim of unfair competition is clearly baseless. Over the years, our companies have engaged in complex and costly procedures to obtain significant reductions in tariffs, and we have succeeded. The current decision by the US Department of Commerce risks setting us back, and is further compounded by the 15% blanket tariff already introduced by the Trump administration.

If these tariffs were to be confirmed, what would be the consequences for producers and consumers?

There will be much less Italian pasta on American grocery shelves and the pasta available will be much more expensive. This will mean lower export volumes, loss of market share for producers and a weaker presence of "Made in Italy" goods for consumers. It is a measure that penalises not only Italian business, but also US distributors and



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consumers, who now associate Italian pasta with quality and authenticity.

What role can the Italian Government and the European Union play at this stage?

The Government has shown sensitivity to the gravity of the situation and is monitoring the decisions of the US Department of Commerce. The hope is that the anti-dumping duties will be permanently removed, leaving only the blanket tariff, which is already very heavy. We are expecting strong diplomatic action also in view of the excellent relations between our two countries.

Some companies are considering producing directly in the US to bypass the tariffs. Is this a feasible option?

Not in the short term. But more importantly, we believe that the integrity of the “Made in Italy” legacy must be preserved at all costs: Italian pasta must be produced in Italy. This is a cultural and economic heritage that cannot be compromised. Our world leadership is built precisely on the authenticity of the supply chain, from grain to production to distribution.

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Are you considering alternative strategies to compensate for a possible drop in exports to the US?

Our companies are already engaged in market diversification. Global pasta consumption is on the rise, but international competition is also increasing and often operates at lower costs than ours. Breaking into new markets takes time – and calls for investment, organisation, and long-term strategies. It is not a plan that could offset the significance of the US market overnight

This situation refocuses attention on the need to safeguard authenticity. Are “Italian sounding” products still much of a threat?

Very much so. High-end products – and pasta is certainly among these – are the most imitated in the world. Fighting Italian sounding products requires the cooperation of the countries where the phenomenon takes root and gains traction. Despite agreements and protocols, imitations remain widespread. Without genuine commitment from international partners, the defence of authenticity remains incomplete.

Looking at the next 3-5 years, what actions are needed to strengthen the sector?

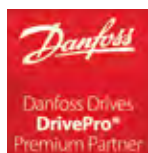
The sector is ramping up investment in efficiency, digitalisation, and sustainability. Pasta is in itself a healthy and affordable food, but we can and must raise the bar even higher, focusing on quality and environmental sustainability. These elements will play an ever more decisive role in shaping global market competitiveness.

What message would you like to send to the supply chain operators and international consumers today?

The pasta sector is a pillar of our country’s economy and cultural identity. Each trade barrier that hinders its competitiveness puts at risk not only the companies involved, but the entire “Made in Italy” system. We urge Italian and European institutions, but also on industry operators and consumers, to take decisive and coordinated action to protect a sector that generates value, employment and international prestige for Italy.



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4



Cauliflower gnocchi and sustainability: how eco-design changes their environmental impact

Valentina Giovenzana
University of Milan



Today, environmental sustainability is an essential criterion in the design of agri-food products. A recent study analysed the entire life cycle of frozen cauliflower gnocchi, from the field to the table, comparing different packaging scenarios and target markets. The results show that, although the eco-design of packaging reduces environmental impacts, consumer behaviour – particularly domestic storage – plays a decisive role in the overall ecological footprint of the product, with reductions of up to 72%. A new systemic vision is therefore needed – one that integrates industry and consumers in the challenge of environmental sustainability.

Introduction

Over recent years, sustainability has become a ubiquitous term in public discourse, business strategy, and environmental policy – though it is frequently employed too generically or even inappropriately. Sustainability, on the other hand, is a complex concept; it is a structured, multidimensional approach based on three fundamental, closely interconnected pillars: environmental, economic and social.

This article focuses on environmental sustainability in the agri-food sector and the importance of considering it nowadays as a real production factor, on a par with raw materials, technological equipment, human capital and marketing strategies. In companies, choices concerning production factors are based on measurable criteria. For example, when selecting a durum wheat for pasta production, food technologists consider precise parameters such as protein content. Likewise, environmental sustainability requires measurable indicators in order to make informed choices and optimise processes. It is here that the Life Cycle Assessment method comes into play. The LCA is the most advanced and internationally recognised scientific method for assessing a product's

environmental impact throughout its entire life cycle.

The LCA method, standardised by ISO 14040 and 14044, and incorporated in the environmental management systems according to ISO 14001, allows for the systematic analysis of all inputs (raw materials, energy, water, packaging materials) and all outputs (finished products, emissions, waste, discharges) associated with the production, distribution, use and end-of-life phases of a product. The principle is simple but powerful: what is not measured cannot be improved.

From an environmental standpoint, this operation alone involves the use of primary energy, the production of climate-altering emissions (CO₂), water consumption and steam production. The LCA method quantifies these elements and includes them in an overall environmental balance. This logic is then applied to all the phases: from the cultivation of the raw materials to their industrial processing, from logistics to domestic consumption and waste treatment.

The European Union is increasingly demanding that production systems evolve towards low-impact, sustainable and circular models. Through policies such as the Green Deal, the Circular Economy Action Plan and the Agenda 2030 targets,

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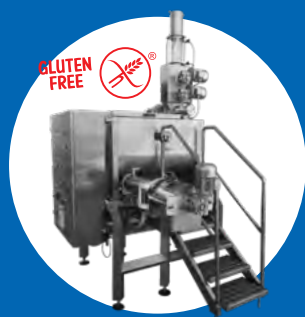
Nowadays, the needs in pasta factories are ever greater: production plants must be more compact, easily washable and highly efficient.

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Europe is promoting the transition to a regenerative economy, where environmental sustainability is not an option, but an obligation.

In this context, the concept of eco-design becomes strategic. Eco-design refers to the deliberate designing of a product and its life cycle, with the aim of minimising its overall environmental impact. It means intervening as early as the development stage to reduce the consumption of raw materials and energy resources, choosing recyclable, biodegradable or regenerated materials, optimising logistics and packaging, designing products that generate less waste and are easier to dispose of or reuse.

Applied to the food sector, eco-design also implies an analysis of the context (as indicated in the ISO 14001 standard), thereby also analysing consumption habits, since the environmental impact of a product does not end at the production plant, but continues right up to the consumer's table.

Aim of the study

The aim of the study (Casson et al., 2023) was to conduct a life cycle analysis (LCA) on 1 kg of cauliflower gnocchi, considering three different packages with different quantities of product 1 kg, 400 g and 286

g. The intention is twofold: on the one hand, to provide an objective benchmark for assessing potential future improvements related to the eco-design of gnocchi production; on the other, to overcome the traditional “cradle-to-grave” approach typical of LCAs by including consumer habits in the calculation.

Materials and methods

The study (Casson et al., 2023) followed the ISO 14040 and 14044 standards, considering 1 kg of gnocchi consumed as a functional unit. The data were collected at the Zini Prodotti Alimentari plant (Milan) and referred to the year 2019, including both primary and secondary data from databases such as Agri-footprint and Ecoinvent.

System Boundaries

[Figure 1](#) illustrates the system boundaries and the main processes involved in the life cycle of cauliflower gnocchi, from the procurement of the raw material to distribution and consumption, highlighting the aspects relevant to the environmental assessment of the product. The method used is EPD 2018, and the impact categories measured are as follows: GWP, global warming potential; CO₂ eq, carbon dioxide equivalents; AP, acidification potential; SO₂ eq, sulphur dioxide

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equivalents; EP, eutrophication potential; PO_4^{3-} eq, phosphate equivalents; FPTO, formation potential tropospheric ozone; NMVOC, non-methane volatile organic compounds; ADP-E abiotic depletion potential - elements; Sb eq, antimony equivalents; ADO-FF, abiotic depletion potential - fossil fuels; WSP, water scarcity potential; EoL, end of life.

Life cycle inventory of cauliflower gnocchi

The life cycle inventory of cauliflower gnocchi examines all production phases, from agricultural activities to the final distribution of the product. The cultivation of soft wheat for the production of durum wheat flour was assessed on the basis of its Italian origin, using reliable secondary data from the Agri-footprint 5.0 database. Two types of cauliflower were considered: powdered and frozen. Both come from Germany, travelling an estimated 500 km to the processing site.

The cultivation activities and processing phases were modelled based on accredited technical-scientific sources, such as Abhay et al. (2006). The primary packaging varies in size (1 kg, 400 g and 286 g): the two larger sizes are made of compostable films containing fossil biopolymers and corn starch, while the

smallest pack is made of conventional plastic materials.

For the evaluation of the secondary packaging, consisting of cardboard boxes and plastic films, secondary data of certified origin was used. The analysis also includes the auxiliary materials used in the production plant, estimated with primary data from 2019 and supplemented with environmental information from Ecoinvent. The activities of the Zini plant, located in the province of Milan, were also assessed: transportation of raw materials, consumption of water, electricity and gas, and production of waste, all documented with primary data updated to 2019.

For the distribution phase, volumes sold and destinations in the Italian market were considered, including the energy required to maintain the cold chain, modelled with secondary data.

Finally, a product loss of 1% was estimated in the distribution phase, as required by the Product Category Rules (PCR), assuming that this quantity is disposed of in landfills.

Results

Two main areas of intervention have been identified to reduce the environmental impact:

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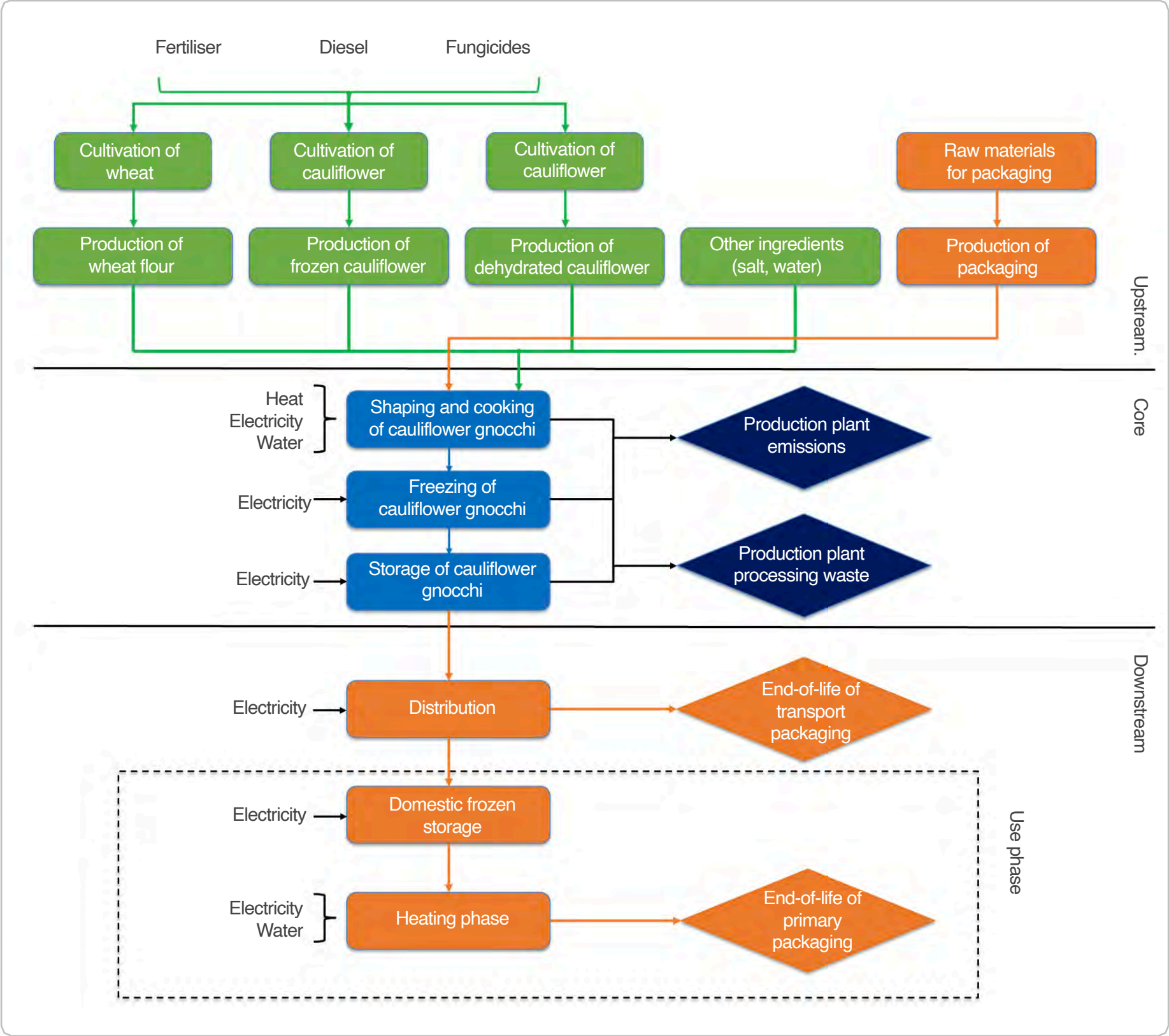


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Figure 1 SYSTEM BOUNDARIES AND PROCESSES INVOLVED IN THE LIFE CYCLE OF CAULIFLOWER GNOCCHI (CASSON ET AL. 2023)



1. Packaging eco-design (cradle-to-gate). Three sizes were compared: 286 g plastic packaging (US market); 400 g and 1 kg biopackaging (European market). The 1 kg solution in compostable material reduced packaging impacts by 62% compared to the plastic packaging. However,

compared to the entire life cycle, this only accounted for about 10% of the total impact.

2. Domestic use (cradle-to-grave). Storage in the freezer for 9 months accounts for an average of 25% of the product’s environmental footprint. If the product is stored until expiry, the

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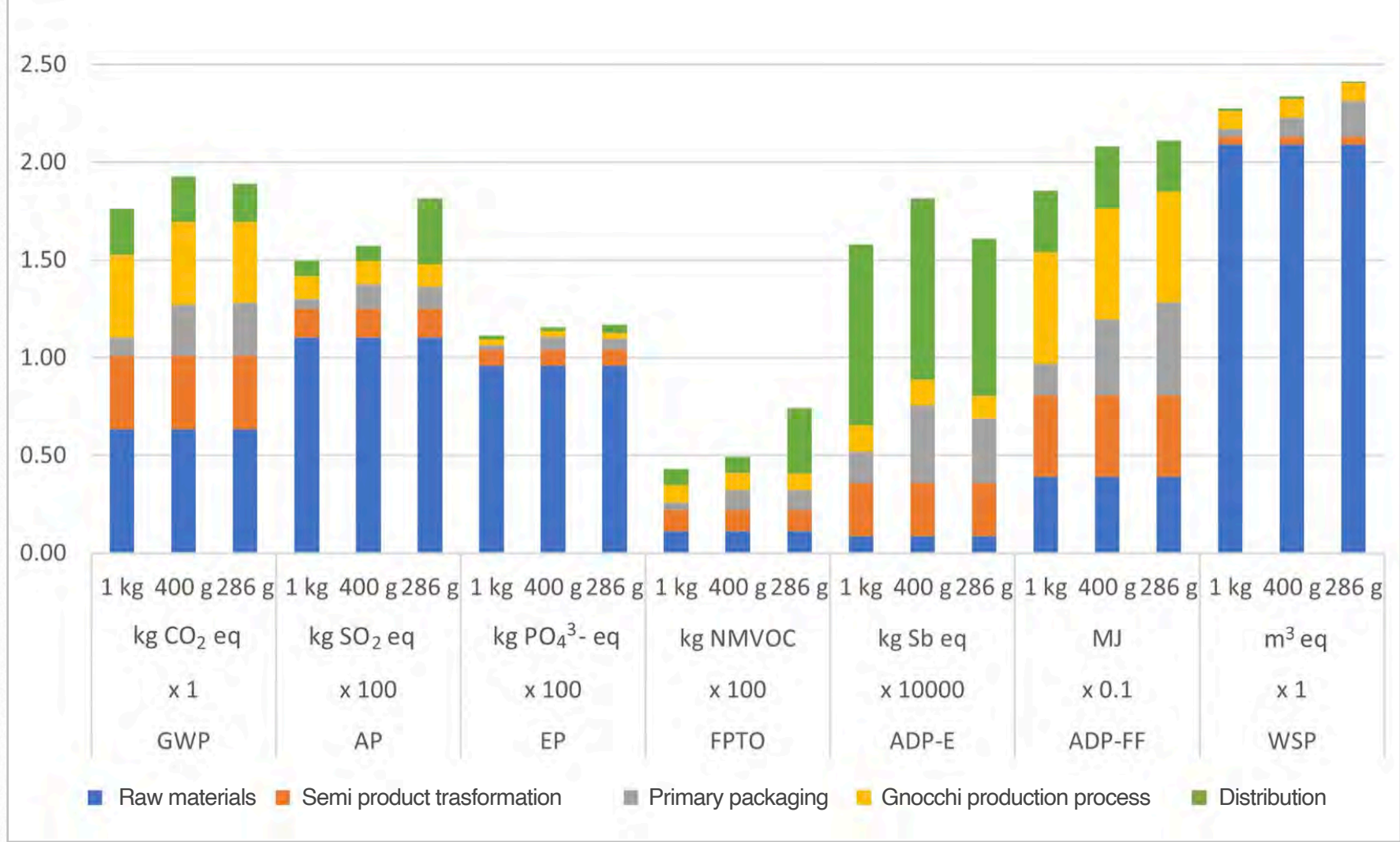
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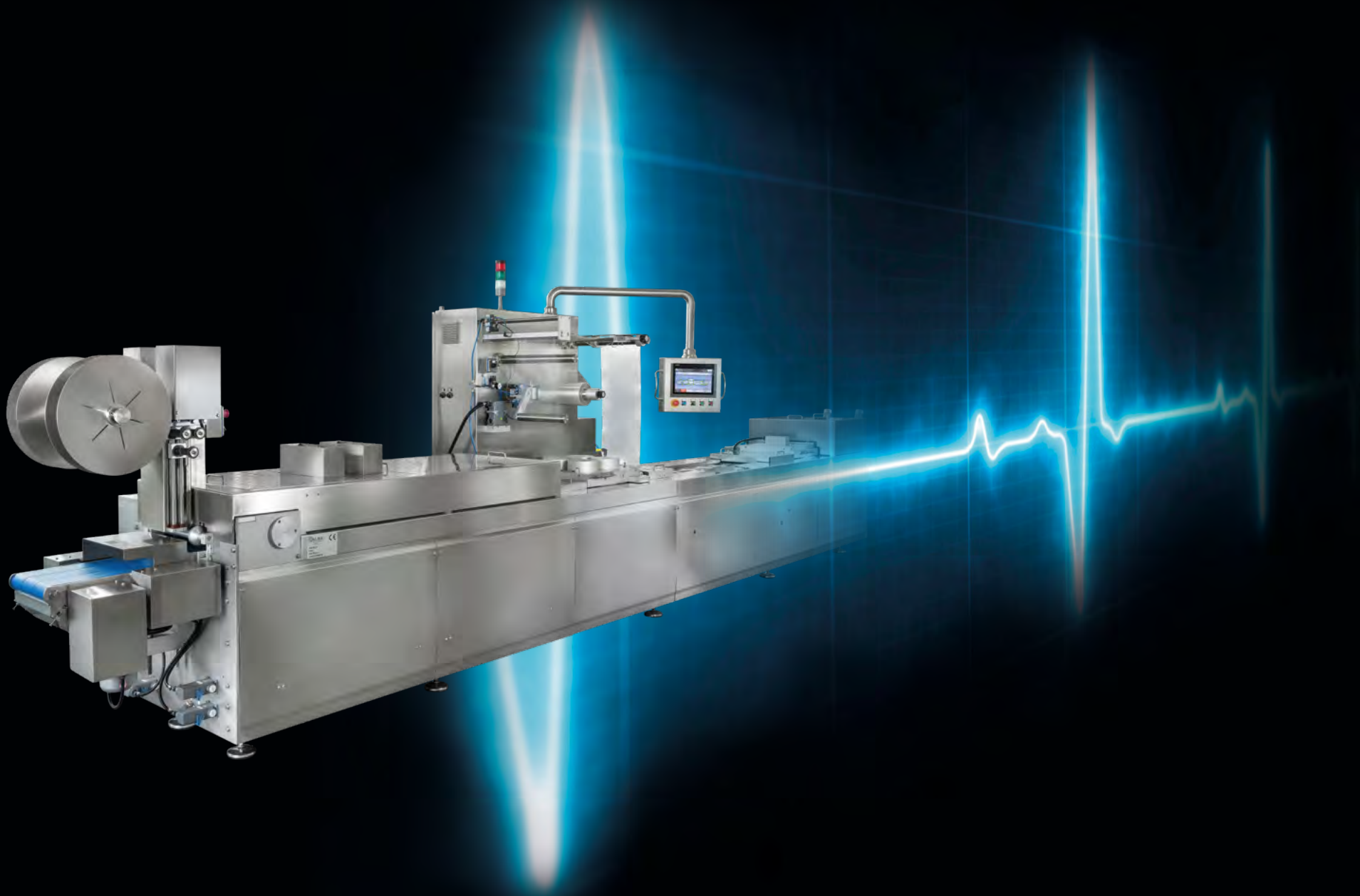
Figure 2 ENVIRONMENTAL IMPACT ASSESSMENT AND IDENTIFICATION OF CAULIFLOWER GNOCCHI HOTSPOTS, 1 kg, 400 g e 286 g – CRADLE-TO-GATE SYSTEM (CASSON ET AL. 2023)



overall impact doubles. Energy consumption also varies according to the energy mix of the different countries. The study showed that the use phase can exceed the sustainability efforts put in place during the production phase. The environmental impact analysis reveals three main critical phases, or environmental hotspots, along the life cycle of the cauliflower gnocchi. The first and most relevant is the agricultural activities, which strongly affect several categories of environmental impact. In particular, these activities contribute significantly to global

warming (GWP), acidification (AP), eutrophication (EP) and water scarcity (WSP). These effects are mainly related to the use of fertilisers and water consumption for irrigation. This is followed by the distribution phase, the second major hotspot, which has significant environmental impacts, especially in international contexts. In the European market, for example, a marked contribution to the abiotic resource depletion potential (ADP-E) is observed, while in the U.S. market, significant impacts are noted in terms of acidification (AP), eutrophication (EP), and tropospheric ozone

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formation (POFP). These impacts are mainly attributable to long-distance transportation. The third hotspot concerns the processing phase of the semi-finished products, i.e. the processing of the cauliflower. During this phase, there are significant impacts on GWP, FPTO, ADP-E and ADP-FF, due to energy-intensive processes such as dehydration and freezing.

Finally, while accounting for a smaller share of the total, packaging also contributes to the environmental impact to an extent that cannot be ignored. Of the different sizes analysed, the 1 kg pack was the most environmentally efficient, performing best in all impact categories. Particularly significant is the improvement achieved through the transition from plastics to compostable solutions, which has reduced the environmental impact by up to 62%.

The eco-design of packaging has shown that impact reductions of up to 47% can be achieved if packaging alone is considered. However, when the entire product life cycle is observed, the effect of packaging only accounts for about 10% of the total impact. Conversely, if the scope of eco-design is broadened to include the domestic storage phase, it becomes apparent that consumer behaviour can make a big difference: it can either contribute to a significant reduction in environmental impact or double the impact through unsustainable choices.

A very important element that emerged from the study concerns the domestic storage phase of cauliflower gnocchi, i.e. the period during which the product is stored by the consumer. According to the data analysed, the choices and behaviour in the use phase account, on average, for 72% of the total impact, considering all environmental categories examined. This phase constitutes one of the main environmental hotspots, the main reason for this being the high electricity consumption required to keep the product frozen, highlighting how consumption habits can significantly affect environmental performance. This detail underlines how important it is to include the consumption phase within LCA analyses and, above all, how strategic it is to raise consumer awareness regarding more sustainable use and storage practices. Only in this way is it possible to achieve a real and lasting environmental improvement over the entire product life cycle. Therefore, the duration of domestic storage is a crucial factor in calculating environmental impact, as it increases proportionally with the time the product is stored, highlighting the importance of limiting storage periods. Shorter storage periods could, therefore, be an effective way of limiting emissions and reducing the environmental burden, even if not directly borne by the manufacturer.



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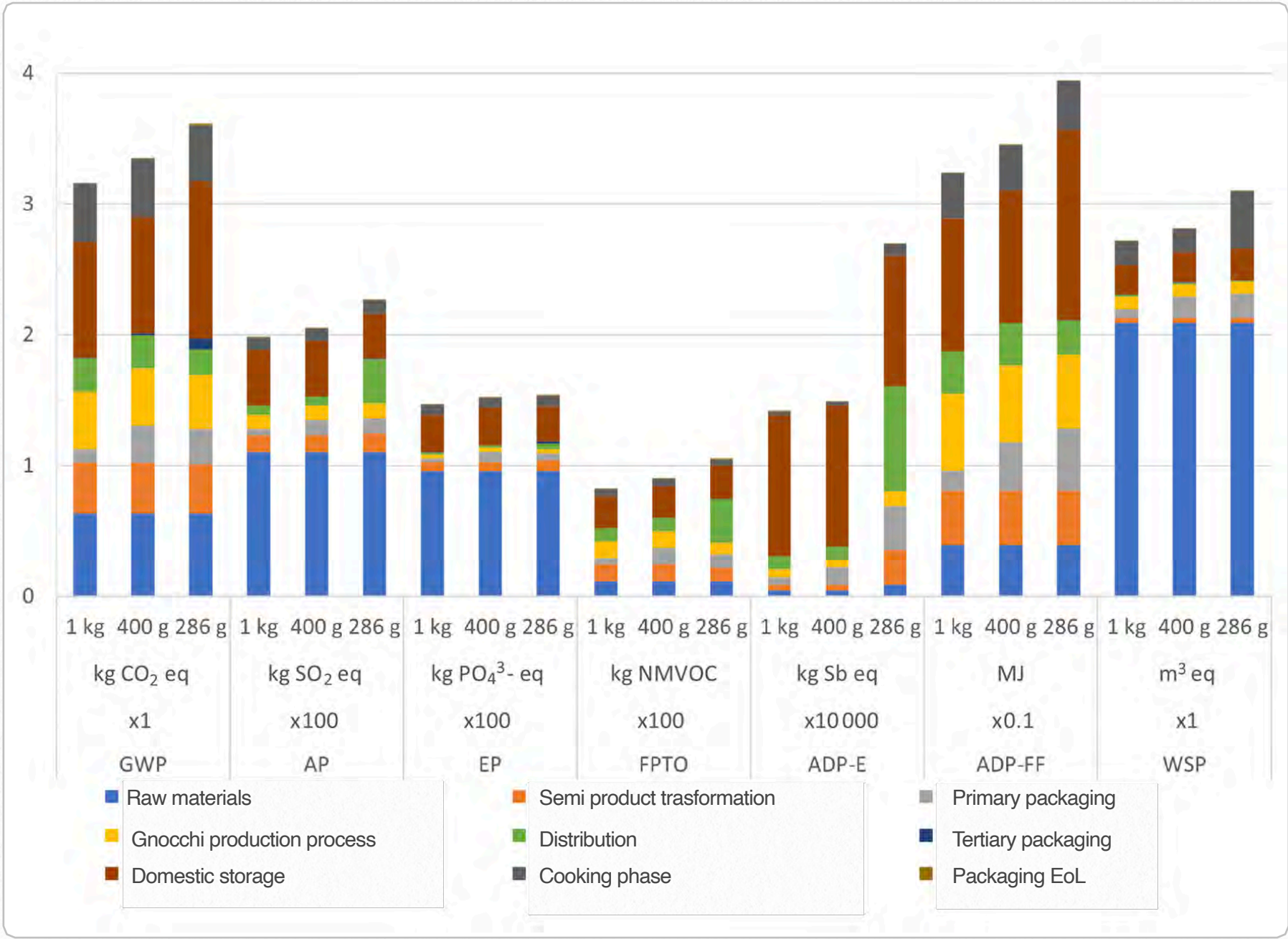
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Figure 3 ENVIRONMENTAL IMPACT ASSESSMENT AND IDENTIFICATION OF HOTSPOTS FOR CAULIFLOWER GNOCCHI IN 1 kg, 400 g e 286 g – CRADLE-TO-GRAVE SYSTEM (CASSON ET AL. 2023)



Conclusions

The future of eco-design in the agri-food sector lies in the ability to intelligently and consciously align design and production choices with real consumer behaviour. At a time when sustainability is no longer just an option but a globally shared strategic goal, analysing the entire life cycle – from production to consumption – becomes an essential requirement, especially at the design phase.

In this context, an objective and scientific approach to environmental assessment is of paramount importance. Having quantitative and comparable parameters makes it possible not only to measure the environmental impact of a product accurately, but also to implement a continuous monitoring system. It is thanks to this monitoring system that critical phases can be identified, their causes analysed and targeted action taken to improve efficiency and reduce environmental impact.

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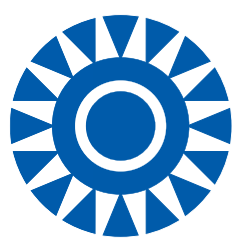
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To measure is to understand. Understanding means improvement. And improvement means moving ever closer to a truly sustainable production model. If environmental sustainability is a productive factor, it must be treated as such and therefore assessed, monitored and optimised. This is the only way to ensure not only high product quality, but also respect for the environment and for future generations.

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5



Landucci: 100 years of business and family

Press release



Federica, Lando and Angela Landucci

In 2025 the renowned die manufacturer celebrates a century of tradition and innovation at the service of pasta factories all over the world.

The year 2025 is an extraordinary milestone for Landucci: one hundred years in business and a consolidated presence in one hundred countries. A dual achievement that encapsulates a century of passion, vision and innovation, but first and foremost of people who, with dedication and expertise, have transformed a family dream into an international enterprise capable of shaping the excellence of pasta.

Founded in 1925 as a small artisanal business, Landucci has grown while remaining faithful to a clear philosophy: innovation but with respect for tradition. Today, its technologies are chosen by leading pasta manufacturers on five continents, appreciated for their reliability, build quality and attention to detail.

To celebrate this important anniversary, the company organised an event that brought together institutions, customers, partners and employees in a spirit of convivial exchange. An exciting journey into Landucci's history, told through images, testimonies, and moments highlighting the human value behind every achievement.





One of the most significant moments of the evening was dedicated to veteran employees, who have spent a large part of their lives in the company: guardians of a wealth of precious experience and key figures in a video interview that expresses, with simplicity and emotion, what it means to belong to the “Landucci family”.

The anniversary was not only a tribute to the past, but also a commitment to the future. Landucci continues to invest in

technology, research and training in order to offer increasingly advanced and high-performance solutions.

With one hundred years of history and a presence in one hundred countries, Landucci looks ahead with the same spirit it manifested at its origins: building the future of pasta through tradition, innovation and people.



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6



World Pasta Day 2025: three days of dialogue and global visions in Istanbul

Editorial team



The 2025 edition concluded with resounding success. Pastaria served as the event's official media partner.

World Pasta Day 2025 returned Istanbul to the heart of the international scene: for three days it reigned as the global capital of pasta. From 24 to 26 October, producers, associations, academics, technologists, nutritionists and institutional representatives from over 15 countries gathered on the banks of the Bosphorus to discuss markets, innovation, sustainability, health and new global perspectives. Organised by the Turkish associations TMSD and MÜSAD, under the aegis of the International Pasta Organisation (IPO), the event was widely attended and the quality of its contents corroborated Turkey's growing role on the world stage: third largest producer and second largest exporter of pasta, with an increasingly autonomous and competitive technological and industrial supply chain. As official media partner, Pastaria closely followed the proceedings, highlighting the dialogue between tradition and the future, the leitmotif of the entire edition. Proceedings opened with the institutional speeches of Aykut Göymen (TMSD), Nihat Uysallı (MÜSAD), Carl Zuanelli (IPO), Halis Kaya (Ministry of Agriculture), Ahmet Güdall (TMO - Turkish Grain Board) and Emre Karadeniz (EMKA), reaffirming the strategic value of pasta in the global food system. The central theme, "From Tradition to the

Future'" informed an extensive programme spanning market analysis scientific insights, technological innovation, consumption and global perspectives. Numerous noteworthy contributions were presented. In the session dedicated to the relationship between tradition and innovation, moderated by Prof. Mehmet Sertaç Özer (University of Cukurova), contributions drew attention to the cultural evolution of pasta, its gastronomic significance, and the regulatory frameworks in Turkey and internationally. Particularly appreciated was the remote speech by Tom Quinn (National Pasta Association, USA), who presented the updates of the charity programme *Billion Meals Challenge*, describing the latest results and the growing impact of the initiative in the fight against global hunger. The focus on innovation was further explored in the session led by Prof. Mustafa Bayram (University of Gaziantep), where artificial intelligence, digitalisation and emerging technologies were presented as new drivers of competitiveness for the pasta industry. Great interest was also aroused by the session dedicated to the global durum wheat market, moderated by Hüseyin Çevik (TOBB - Union of Chambers and Commodity Exchanges of Turkey), which brought together contributions from all the

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main production areas. Speakers: Güler Ünlü (TMO - Turkish Grain Board) for the Turkish scenario; Jaume Mas (Semouliers) for the European area; Brennan Craig (AGT Food and Ingredients) for North America; Michael Kurajdov for the markets of Russia and Kazakhstan. This series of presentations provided a comprehensive and current perspective of the dynamics that are reshaping the global balance of durum wheat. Against a backdrop of high volatility and climate change, the debate offered a clear picture of the challenges and opportunities for global producers. The panel on pasta consumption and trends in Turkey and worldwide was also

highly anticipated. With contributions from IPSOS and Biagio Sala (Anselmo), it showed how pasta continues to be perceived as a healthy, versatile and sustainable food, even amid market dynamics that demand more and more research and differentiation.

The highlight of the scientific programme was the presentation and signing of the new *Scientific Consensus on Pasta*, coordinated by Prof. Nerim Sanlier (Ankara University), with contributions from Dr. Osman Müftüoğlu, nutritionist Dilara Koçak and Dr. Olivia Di Vincenzo (La Sapienza University of Rome). The paper provided updated evidence on the role of pasta in



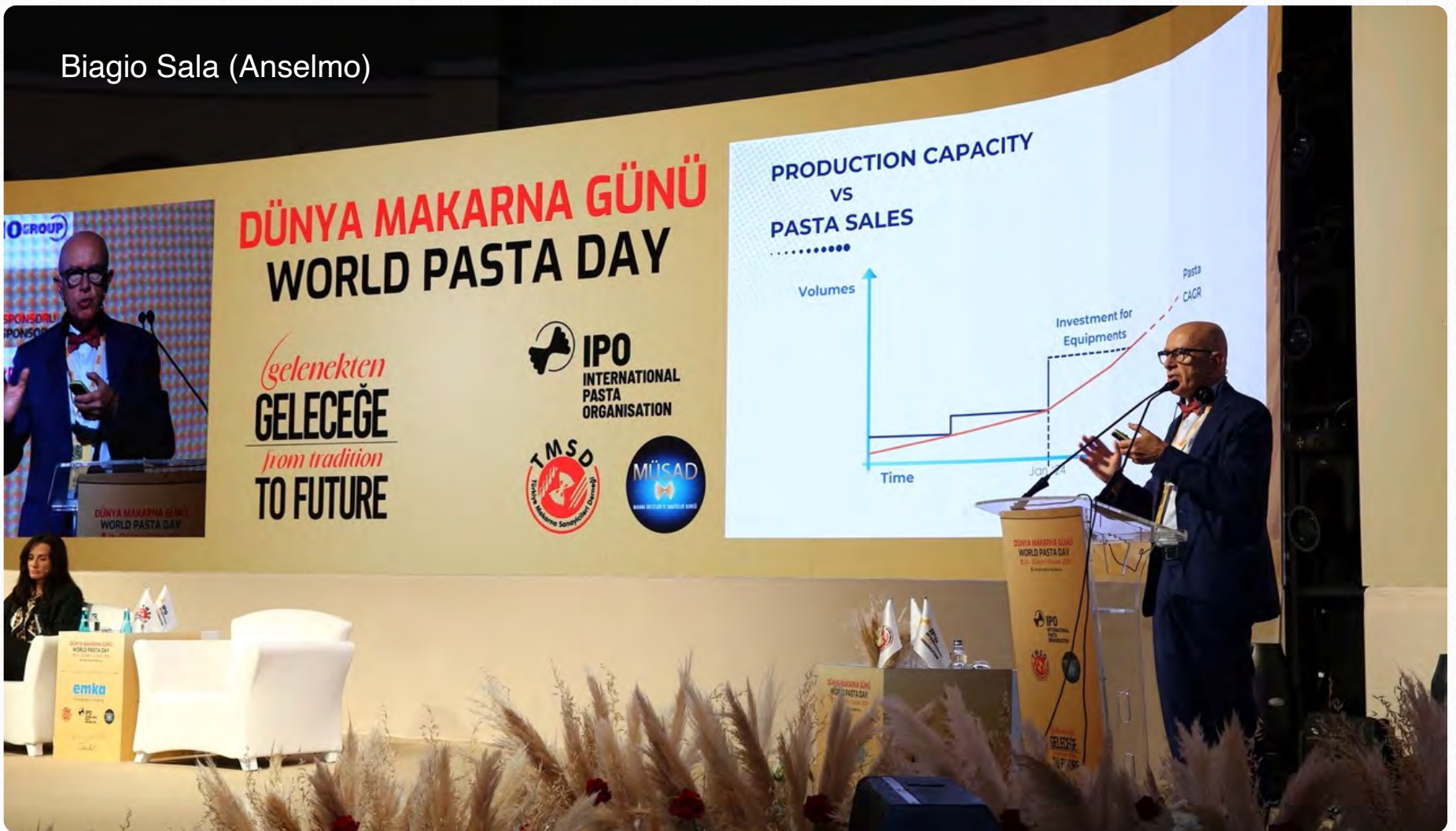
Carl Zuanelli, President of the International Pasta Organisation



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the modern diet, reaffirming its nutritional value, sustainability and importance within balanced dietary models.

Another key moment of the event was the panel dedicated to technological innovations, featuring contributions from experts representing leading companies in the supply of equipment and machinery for processing and packaging in pasta production. Presentations by Emrullah Karadeniz (EMKA), Luigi Fava (Fava), Biagio Sala (Anselmo), Christoph Vogel (Bühler) and Sercan Namtaz (HEPMAK) illustrated the latest solutions to improve efficiency, sustainability and product quality, underlining how innovations in

plant engineering is reshaping the future of the pasta industry.

There was no shortage of time for networking and conviviality, essential elements for strengthening the industry's international relations: the Bosphorus boat tour, welcome cocktail reception and gala dinner provided an ideal setting for business-to-business meetings, exchanges of ideas, and the creation of new partnerships.

The 2025 edition of World Pasta Day proved yet again that pasta is far more than just a food: it embodies culture, global economy, scientific research, technological innovation and dialogue

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between countries. Istanbul was the epicentre of this event, providing a unique stage for an ever-evolving industry. With a wide-ranging programme and a high level of international involvement, World Pasta Day 2025 concluded by reinforcing its mission: to unite the world around pasta, its future and the values it represents.

Building on the dialogue and collaboration launched in Istanbul, the global pasta community now looks ahead to its next major event: Pastaria Fair & Festival 2026, scheduled for 30 and 31 March at the

Stazione Leopolda in Florence. An event that will bring together producers, suppliers and associations from all over the world in a unique setting dedicated to innovation, business and the culture of pasta. For full details, see the article published in Pastaria entitled *Fiera Pastaria & Festival 2026: the international pasta community meets in Florence.*

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7



Turkey's pasta industry looks to global markets

Editorial team



Interview by Pastaria with Aykut Göymen, President of TMSD, on the occasion of World Pasta Day 2025 in Istanbul.

During World Pasta Day, celebrated in Istanbul on 25 October, Pastaria met with Aykut Göymen, President of the Turkish Pasta Manufacturers Association (TMSD), to discuss market dynamics, growth perspectives, the geopolitical environment and industry strategies. The picture that emerged is one of strong dynamism: domestic consumption is increasing, significant industrial investments are underway, and there is a determined push toward international markets, despite challenges linked to geopolitical tensions and trade barriers.

A domestic market still limited but growing

IGöymen explains that per capita pasta consumption in Turkey stands at around 7.2 kg per year, for a total domestic demand of approximately 700,000 tonnes.

Although this figure is well below European averages, it is gradually rising thanks to communication efforts aimed at informing consumers about the nutritional benefits of pasta.

“We are working actively to increase domestic consumption, and the first results are encouraging,” he notes.

Exports: Africa, Venezuela and Japan at the centre

Turkey’s vocation for export is now well established. Pasta shipments total around 1.5 million tonnes per year, worth nearly USD 950 million.

African markets remain the main destination, although the commercial geography changes rapidly.

“In 2023, Venezuela was a significant outlet, but volumes have since declined. This year, Japan has emerged as a major destination, with growing volumes and satisfactory prices.”

Looking ahead, the United States and the United Kingdom are considered strategic markets for strengthening Turkey’s international presence.

Investment and increased production capacity

IThe industry is experiencing an expansion phase. In recent months, three new producers have begun operations, while several established manufacturers have invested in upgrading plants and expanding capacity.

Total output has reached around 3 million tonnes, and ongoing investments may lead to further increases.

Göymen notes that product quality has improved significantly over the past four to



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MAIN TAKEAWAYS

- ✓ **Turkey is consolidating its role as a major global pasta exporter**, with Africa and Japan among its most dynamic destinations and growing interest in the U.S. and U.K. markets.
- ✓ **Domestic consumption is still modest but rising**, supported by communication efforts to promote pasta as a healthy, everyday food.

- ✓ **Industrial capacity and product quality continue to improve**, driven by new investments and the adoption of advanced — largely Italian — technologies.

five years, largely thanks to the adoption of advanced technologies supplied by leading Italian manufacturers.

Tariffs, geopolitics and competitiveness

Market performance is also being shaped by geopolitical developments. The war between Russia and Ukraine has caused sharp volatility in raw material prices, with repercussions across the entire supply chain.

Trade barriers are another major obstacle. In the European Union, the duty-free quota is limited to 20,000 tonnes per year; beyond this threshold, an additional €220 per tonne is applied, sharply reducing competitiveness.

In the United States, anti-dumping

measures have raised the overall duty level to about 75%.

“These are substantial obstacles,” Göymen comments, “but we continue to see both markets as essential for our future growth.”

Quiet support for the domestic durum wheat chain

Lo sviluppo della produzione nazionale di grano duro è considerato un tassello fondamentale per assicurare continuità e qualità. Göymen sottolinea che le istituzioni turche stanno sostenendo gli agricoltori, con interventi mirati a migliorare la qualità delle sementi e a garantire stabilità economica ai produttori, così da rafforzare la filiera nazionale.

The role of TMSD

The association's priorities include promoting domestic pasta consumption, communication initiatives aimed at consumers, and support for the internationalisation of member companies.

"Our goal is to help grow the market through effective communication and targeted initiatives," Göymen explains.

A message to the international community

In closing, Göymen emphasised the value of celebrating World Pasta Day together, expressing gratitude to the International Pasta Organisation (IPO) for its support in hosting the event in Istanbul.

"Pasta is a healthy food, and we want to contribute to increasing its consumption worldwide," he concludes.



From left: Lorenzo Pini, Editor-in-chief of Pastaria, and Aykut Göymen, President of TMSD

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8



Molino Grassi presents its 2024 Sustainability Report

Press release



In 2024, revenues of over €81 million, 100% electricity from renewable sources, zero workplace injuries and 86% of expenditure allocated to Italian suppliers.

On Thursday 13 November, at its Fraore headquarters, Molino Grassi officially presented its second Sustainability Report, covering the year 2024. A significant moment, confirming the company's readiness to share its environmental, social and economic commitment in a transparent manner, and to integrate it into a long term development strategy. Founded in 1934 and now led by third and fourth generations, Molino Grassi embodies a business model that combines milling tradition, technological innovation and responsibility towards the local community. The Report is intended as a tool for dialogue with all of its stakeholders – employees, farmers, suppliers, customers, partners, institutions and the community – and reflects the values that have guided the company for over ninety years: putting people first, quality as the result of shared processes along the supply chain, protecting the local environment and building relationships based on trust and transparency. Through data, projects and testimonies, the report recounts a journey that focuses on a clear vision: to combine growth with responsibility, innovation with tradition, generating sustainable value for those who grow the products, those who process them and those who bring them to the table each day.

Quality: a shared process throughout the supply chain

For Molino Grassi, quality is not an achievement to be exhibited, but a daily commitment. Its work with farmers is based on traceable supply chains, shared guidelines and sustainable cultivation practices, with a special focus on the revival of ancient varieties and less-favoured areas. A choice that generates value locally: 86% of purchases are, in fact, directed towards Italian suppliers, with a significant portion based in Emilia-Romagna itself.

The products: an evolving milling tradition

Molino Grassi's automated plants process 130,000 tonnes of cereals annually. This processing gives rise to over 100 products, organised in dedicated lines:

- *professional flours* for the making of bread, pizza, pastry and fresh pasta;
- *durum wheat semolina*, including the distinctive Kronos® line, obtained from a variety selected and grown in Italy;
- organic lines, including the innovative La Pasticceria Bio, fruit of over 30 years of organic experience, making Molino Grassi a key player in Europe;

- *qb line*®, blending ancient and modern grains to create bread with a truly genuine taste;
- *Miracle line*®, developed from the revival of ancient local varieties, symbolising the connection between agriculture, biodiversity, and regional culture.

Each flour is developed with a clear purpose: to respect those who grow it, those who process it and those who bring it to the table.

Research, control and innovation

Special attention is paid to quality control: around 20% of our staff work in the laboratory, using advanced technologies to monitor crop protection products, allergens, toxins and contaminants, and constantly comparing results with external laboratories. At the same time, Molino Grassi is engaged in regenerative agriculture initiatives, varietal trials, and partnerships with universities and research centres.

People and well-being

Quality starts with people. In 2024, the company recorded zero workplace injuries, guaranteed 100% coverage of contracts under Italy's National Collective Labour Agreement, and built a 38% female workforce. Inclusion, safety, training and

dialogue are the key principles of a workplace built on respect and responsibility.

Environment and resources

Molino Grassi has been using electricity exclusively from renewable sources for over ten years now. This is complemented by investments in sustainable technologies: an automated temperature-controlled warehouse, an open-loop geothermal cooling plant, circular economy practices for by-products destined for livestock and biogas supply chains, and FSC-certified packaging®.

Responsible governance

The company has set up a Sustainability Committee, obtained the “two-star ++” legality rating and holds major certifications such as: SA8000, ISO 9001, ISO 22000, ISO 45001, ISO 22005, ISCC Plus.

“Ninety years of history have taught us that quality and sustainability are not goals, but a way of doing business,” state Massimo, Andrea and Federica Grassi.

“Our commitment is to keep cultivating a better future for people, and for the local territory and communities that have always been a part of our journey.”

Molino Grassi's 2024 Sustainability Report is available on the company website:

molinograssi.it.

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

I NOSTRI SERVIZI

- **Una guida anticipata sui trend di mercato e su quelli tecnici.**
- Un appoggio sicuro su problemi legislativi generali ed aziendali dove A.P.P.F. è tradizionalmente informata.
- Una gestione associativa concorde e non burocratizzata dove il Presidente e gli Associati hanno diritto ad un voto e la segreteria è sempre vicina.

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9



Rising meat costs squeeze pasta manufacturers' margins

Pastaria Centre for
Economic Research



Europe pays the price for shrinking livestock herds: reduced availability of beef cuts – the hardest hit by escalating prices – has triggered a domino effect across the entire food supply chain.

World prices set a new record, according to FAO indicators. With Europe taking its place among the regions where tensions over meat prices have reached maximum alert levels, an unprecedented situation, at least in recent historical memory, has developed.

This is not a speculative flare-up, but the outcome of a combination of factors that has made beef in particular structurally more expensive. Imbalances in market fundamentals, due to a structural contraction of European supply, are the main drivers of price tensions. But also adding fuel to the fire of rising prices are recurring sanitary/health risks and tensions in the market for cattle for fattening, compounded by equally inflationary factors such as higher production costs and a demand that is only partially inelastic to price. Factors that have contributed to creating the situation in which companies, downstream of industrial slaughterhouses and the entire artisanal food sector that uses meat in its processing, now find themselves operating.

The phenomenon has also had a significant impact on the sector of fresh filled pasta (ravioli, tortellini, agnolotti and other preparations), which has faced rising costs and an inevitable compression of margins, due to the impossibility of shifting

the entire increase onto the “ex-factory” price, or directly to consumers in small retail production facilities.

It is important to keep in mind that, in addition to beef cuts, pork and poultry have also been subject to price increases, with a domino effect on secondary processing, starting with cured meats and hams.

Returning to the subject of cattle, the key element for the economic reading of the phenomenon is the structural nature of the production downturn, which is now very evident in Europe.

Just consider the fact that in the first nine months of 2025, EU beef production fell by 9.9% year-on-year. A trend involving most of the western bloc countries, with particularly sharp contractions in Germany, Belgium and the Netherlands. The livestock herds of the EU-27 have significantly shrunk, with the number of heads on farms falling between 2020 and 2024 by 7.5% in France, 7.4% in Germany, 3.4% in Ireland and 9.9% in Italy.

The structural nature, mentioned above, is the result of a physiological reduction in cattle herds, growing environmental and climatic constraints, and fluctuating profitability. These factors have collectively prompted the withdrawal of numerous farms from livestock production, especially the medium-sized and small ones.

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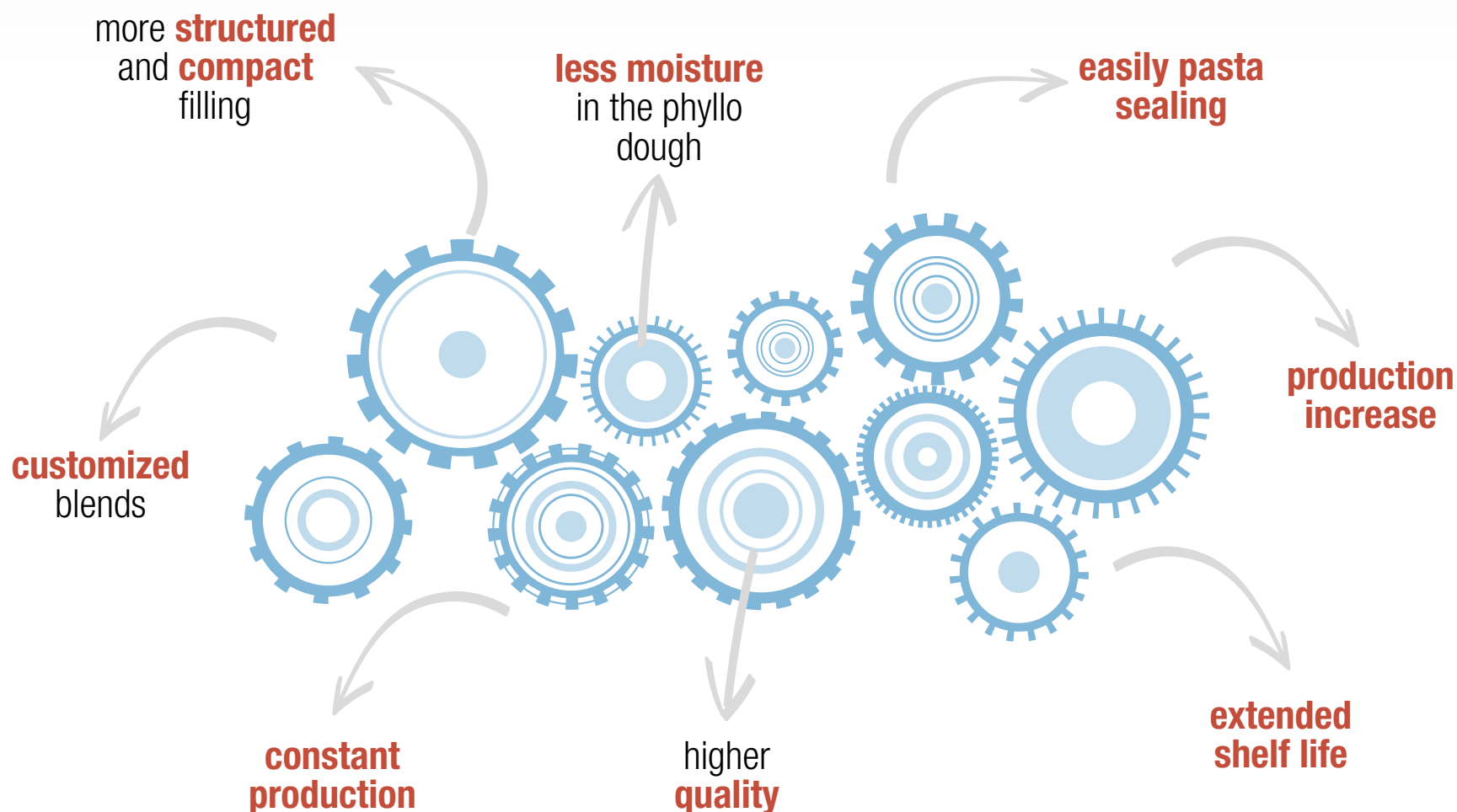
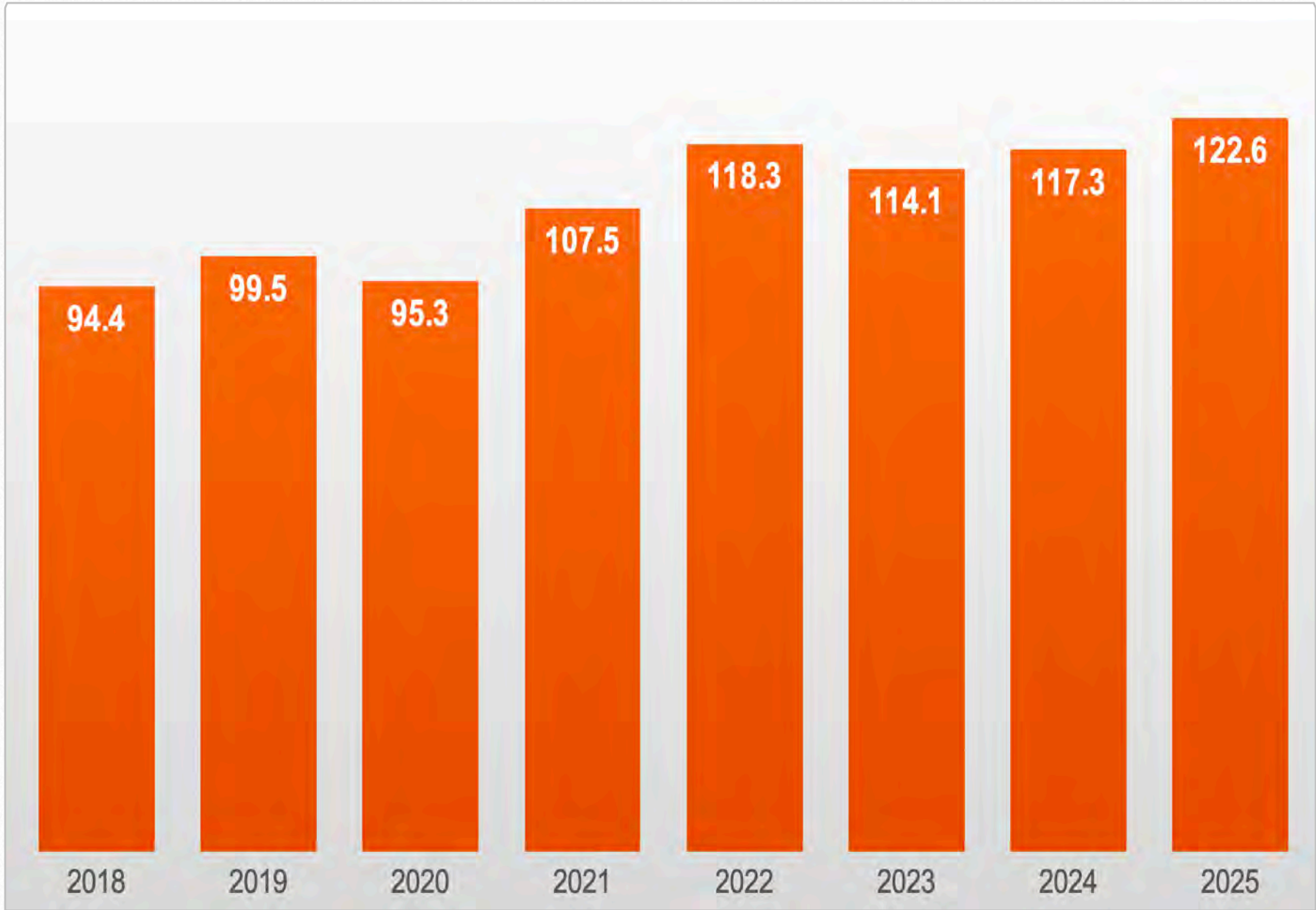


Chart 1 FAO MEAT PRICE INDEX (2024-2016=100)



In a sector characterised by long production cycles (unlike poultry), which make operating costs inflexible, even a reduction in supply of just a few percentage points can trigger sharp price increases across the entire production-distribution chain. Also to be considered is the sanitary/health factor and consequent “risk premium”, which is passed onto prices across the various stages of exchange. Emergencies due to epizootic diseases, travel restrictions and increased controls affect both direct costs (biosecurity,

protocols, monitoring, preventive measures) and indirect costs attributable to temporary shutdowns, protection zones and logistical delays. On top of this comes systemic risk from greater uncertainty, pushing breeders, fatteners and slaughterers to seek higher margins of coverage. This premium then becomes a permanent feature in price setting and ultimately reaches the consumer. The cost effect – common to all livestock supply chains – is another factor underlying the price increases. Prices for feed, energy, transport, pharmaceuticals



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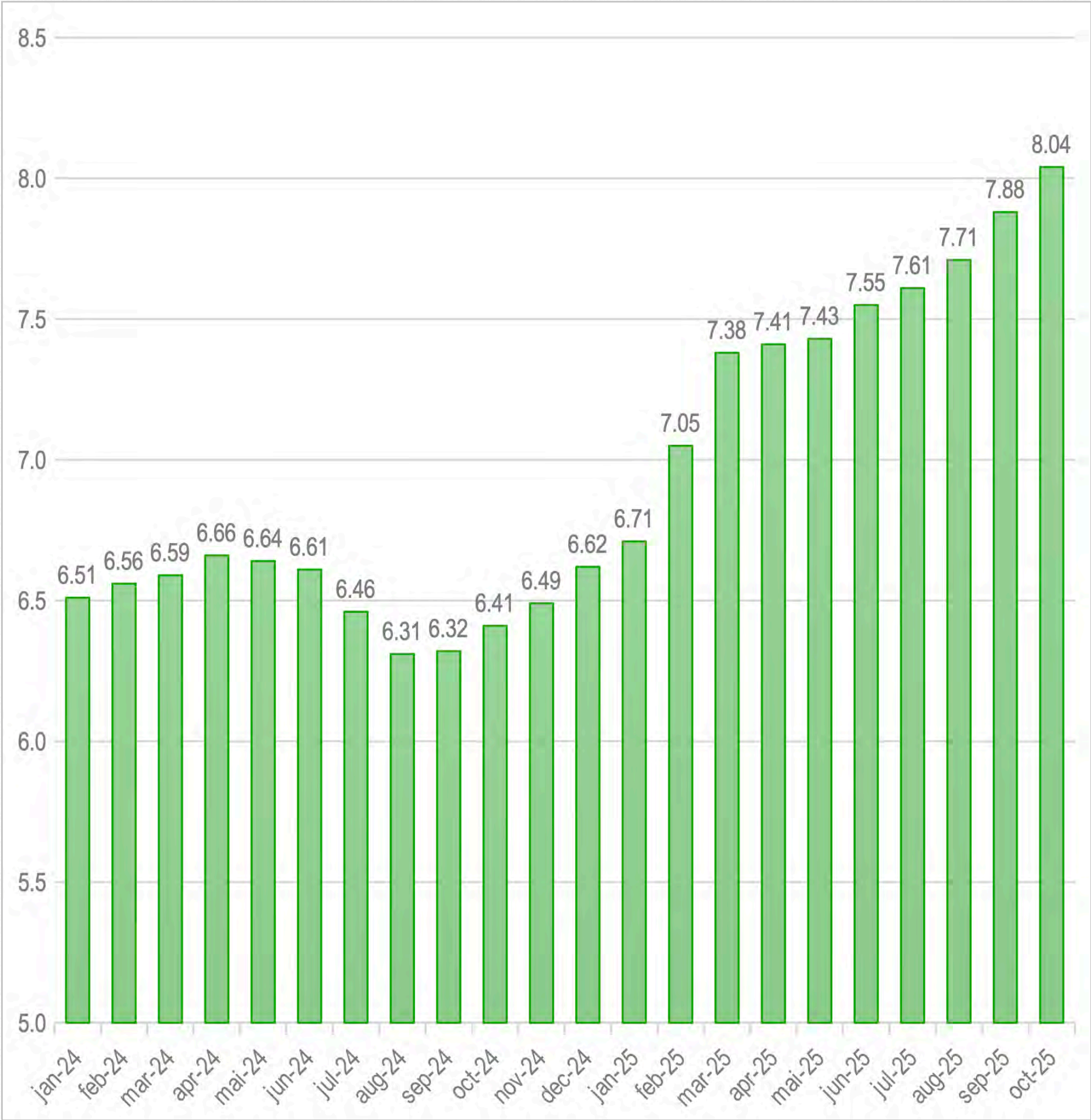
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Chart 2 HALF-CARCASSES OF YOUNG BULLS: AVERAGE WHOLESALE PRICES IN ITALY (€/kg)



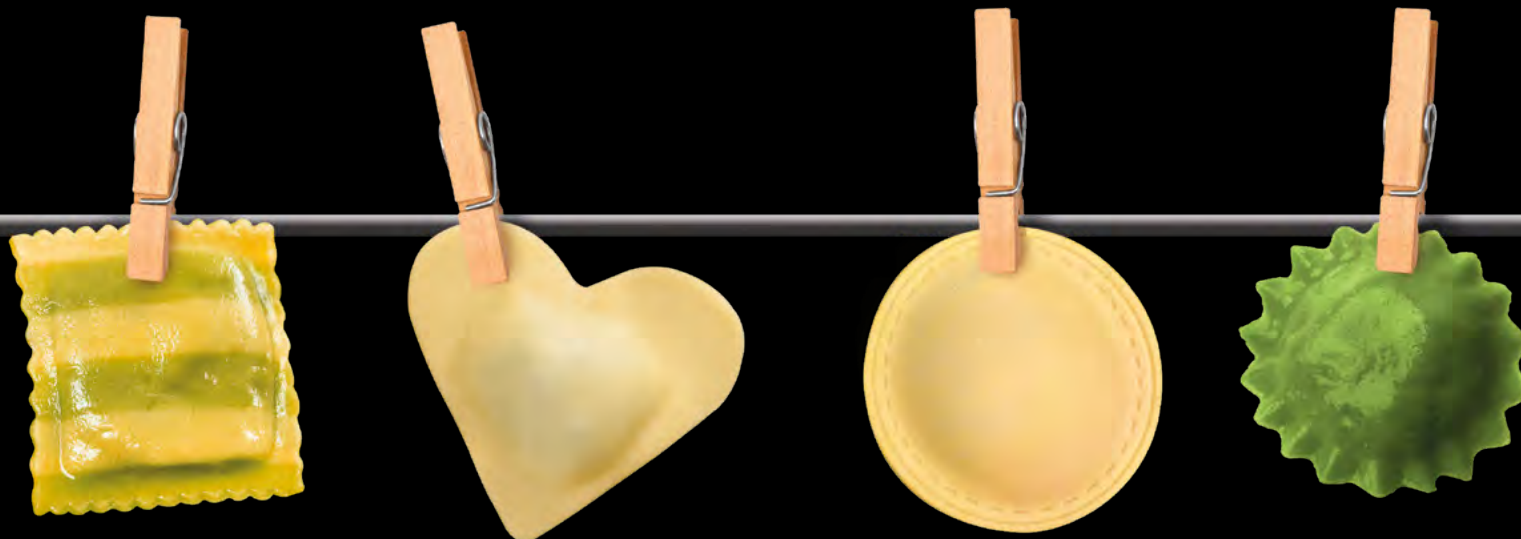
Source: Ismea

and veterinary services, but also wages and financial charges, are structurally higher than in the pre-pandemic period.

For many farms, especially in the cattle and pig sectors, historical prices, among other things, do not cover the full cost of

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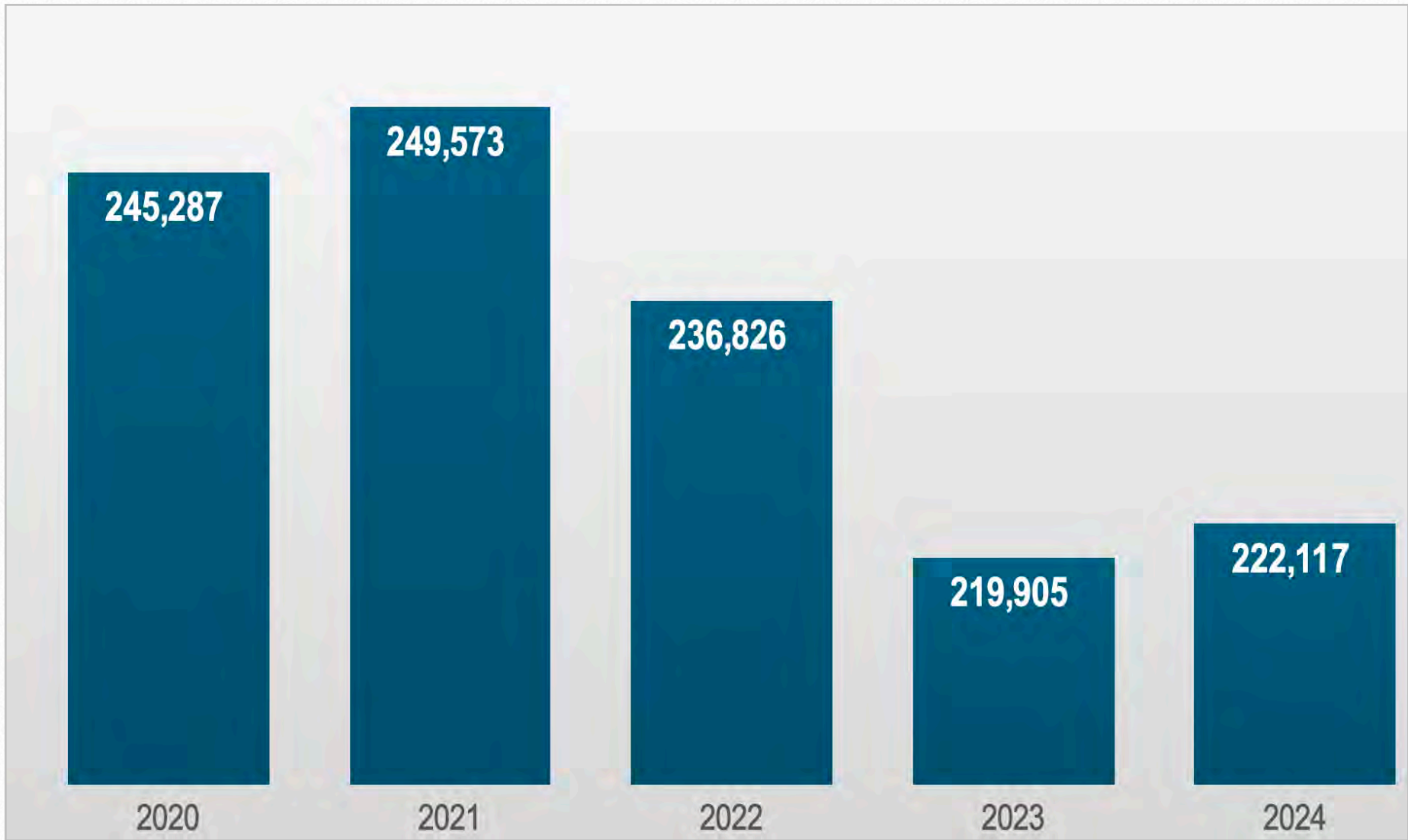


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Chart 3 TREND IN PIG SLAUGHTERINGS IN THE EU-27 (.000 HEAD)



Source: Eurostat

production. The price increases observed do not reflect systemic windfall profits, but rather the bare minimum required to prevent further supply contraction and avoid new cascading inflationary effects. The Italian case presents a number of peculiarities that reflect some structural fragilities mainly due to the dependence on foreign cattle for fattening in the beef sector. Increased competition for the French supply of livestock for fattening, with French breeders themselves keeping cattle for fattening in-house, has raised the prices of broutards (French calves entering

Italy at an age of 7-12 months). Attempts to diversify supplies brought about few improvements, with arrivals from the Czech Republic, Ireland and Poland having no compensatory effect either in terms of quantity or cost, due to logistical implications, failure to meet quality standards and difficulties in supply chain relations. These factors fuelled the tensions on prices at the source, with finished cattle (young bulls) up 20% in the first half of 2025 and 25% in August alone (year-on-year). Increases that raised the bar for wholesale prices for young bull

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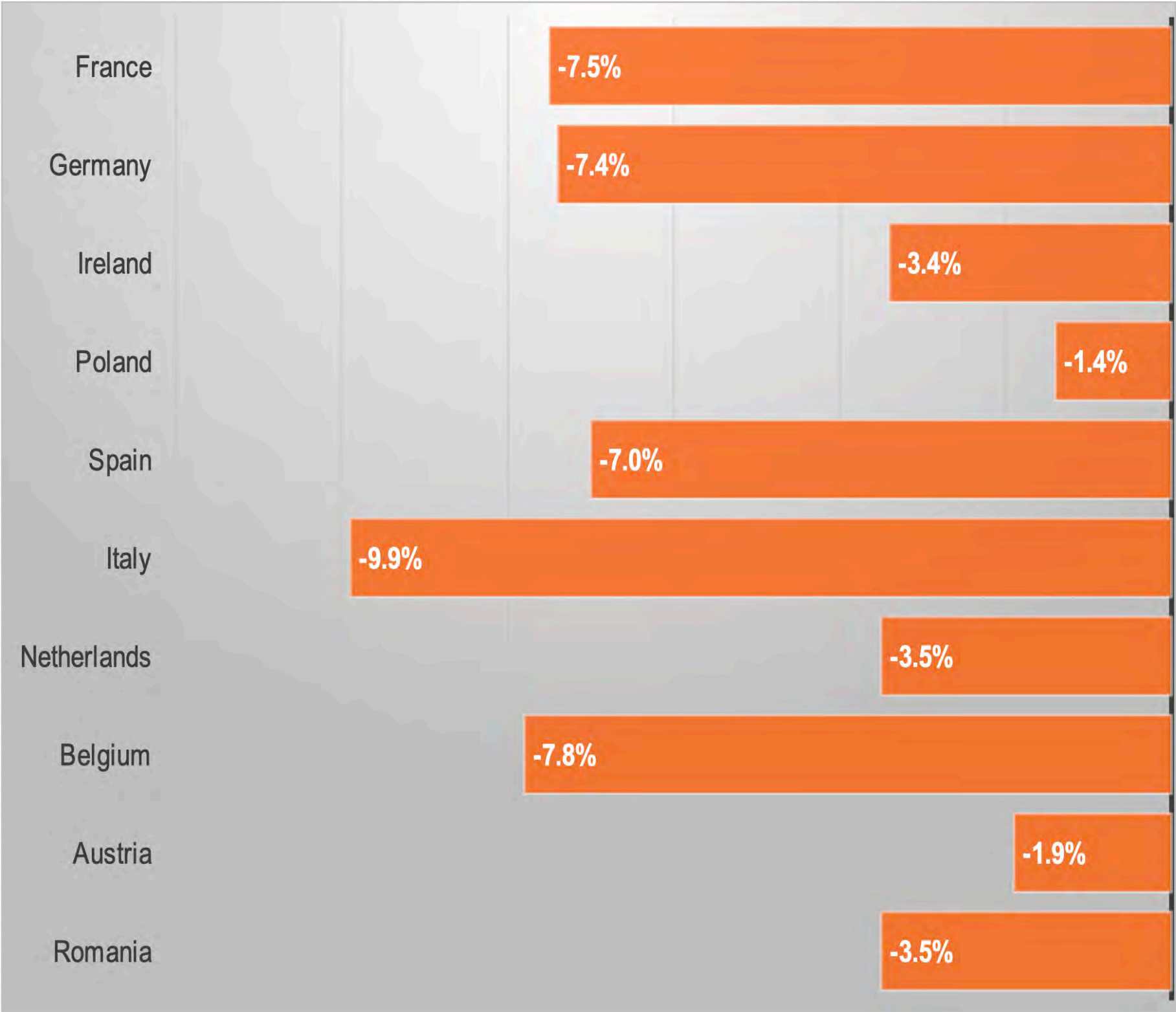


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Chart 4 CATTLE HERD DYNAMICS 2024/2020



Source: Ismea on Eurostat data

beef by about 10 percentage points year-on-year.

The 4.4% drop in imports of cattle for fattening in the first half of 2025 was not, moreover, offset by an increase in foreign purchases of beef, with arrivals of fresh cuts falling by 3.6%. In contrast, imports of frozen meat from South America

increased by 7.2% (though without compensatory effects), but the possibility of relying on imports to stabilise retail prices is limited by costs, distances, risks and constraints on quality and continuity of supply.

These factors are compounded by a rigidity of demand related to nutritional and

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cultural reasons and consumer perception of quality. For the supply chain, this inelastic demand does not prevent higher costs from being passed downstream, at least to some extent, as reflected in the data.

In the meantime, market fundamentals have not changed: European supply remains limited, costs are structurally higher, the sanitary/health risk and the pressure of international demand on cattle for fattening persists.

In the medium term, the outlook suggests further tension, with supply still tight in the EU, the United Kingdom and the US, while demand remains substantially inelastic.

The EU–Mercosur agreement could increase the inflow of South American beef, but its impact will be conditioned by tariffs, environmental standards and European sanitary requirements. So it will not be immediate, but will require a gradual adjustment in compliance with the principle of reciprocity of rules.

The situation is different for pork, with the European supply growing once more, thanks mainly to large producers in Spain, Poland and Germany, in particular. In the first six months of 2025, production in the EU-27 was up 1.6% year-on-year, on a path towards normalisation, following difficult years at the height of the African swine fever emergency.

Price tensions from the 2023–2024 biennium have partly eased, and China’s recent restrictions on imports – introduced as a retaliatory measure by Beijing against the EU’s anti-dumping duties on China’s electric cars – are having disinflationary effects on EU markets, with foreseeable excess domestic supply in the absence of alternative outlets.

The production context is not favourable: in the first half of 2025, slaughterings in the EU-27 increased by 1.6%, in line with the trend observed in 2024, while

consumption appears stagnant, following the inflationary phase that put the brakes on European demand. At the same time, trade agreements are expected to favour the access of competitively priced meat from the United States and Mercosur countries to the European market.

The signs are already evident: in September, prices for major pork cuts fell by 5–6% year-on-year, against a backdrop of mounting uncertainty.

Beijing’s decision to impose anti-dumping tariffs of 15.6% to 62.4% on European pork adds further strain to already tense trade relations between the EU and China. In 2021, EU-27 exports nearly reached 6.5 million tonnes, but by 2024 – following the collapse of shipments to China – they had already plummeted to 4.3 million. This year, the outlook may worsen further.

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