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Pastaria International DE
1/2026
January



PUBLISHER

Kinski Editori S.r.l.

registered office

Via Possioncella 1/1 • 42016 Guastalla

operational headquarters

Via Dall'Aglio 21/2 • 43122 Parma (Italy)

tel. +39 (0)521 1564934

fax +39 (0)521 1564935

Email redazione@pastaria.it

ROC no. 23238

EDITOR-IN-CHIEF

Lorenzo Pini

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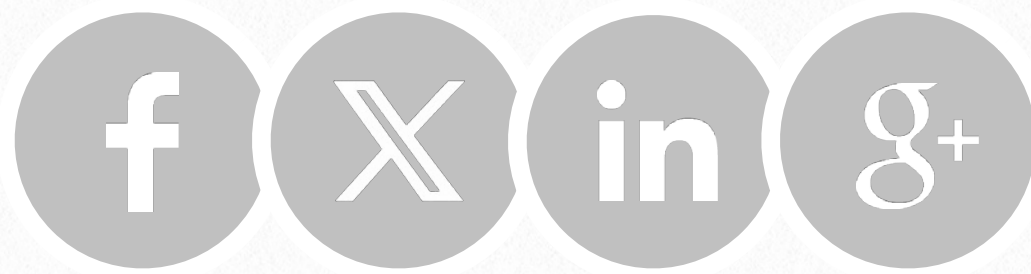
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1



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

Editorial team



At Stazione Leopolda in Florence, on March 30 and 31, 2026, the only trade fair entirely dedicated to machinery, ingredients, and services for pasta factories returns.

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 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



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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.

For a preview of the Pastaria Festival program, please refer to the article [*Pastaria Festival 2026: two days to explore the future of pasta.*](#)

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 Fiera Pastaria & 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. With simultaneous English translation, the Festival's conferences guarantee global participation and dialogue.

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Stazione Leopolda will host the key players of a supply chain that embodies "Made in Italy" excellence and a worldwide culinary heritage.

The 2026 edition will also mark the tenth Pastaria Festival, a milestone that confirms the central role of this event in the global arena.

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.

How to take part

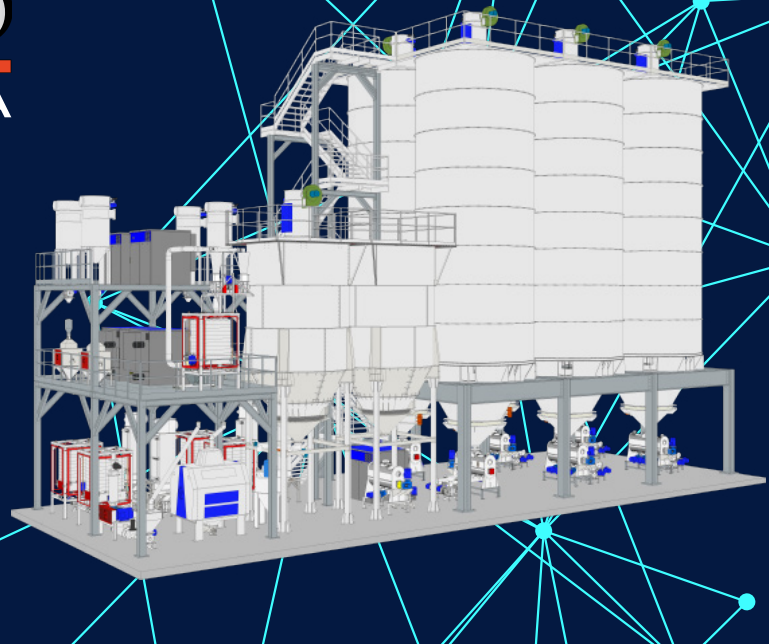
Pasta producers may now pre-register online to claim their complimentary ticket at www.fierapastaria.com.

Suppliers of technologies, ingredients, and services interested in sponsoring or exhibiting at the Pastaria Festival can request the brochure outlining participation opportunities by either contacting info@pastaria.it or calling +39 0521 1564934.

Fiera Pastaria & Festival 2026 will give you an unbeatable opportunity to meet, share, and build the future of pasta together.

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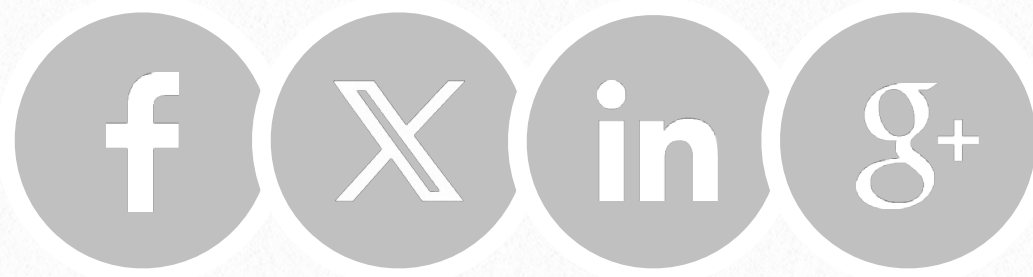
Floury products control systems



Couscous storage, conveying and selection



2



Fava Storci vacuum dough sheeter

Editorial team



Experimental results and process solutions for improving the chromatic and rheological characteristics of dough sheets in fresh pasta production.

Figure 1 FAVA STORCI VACUUM DOUGH SHEETER, MODEL STF-540TV



Fava Storci proposes two technological solutions for the production of dough sheets, both based on the use of vacuum and oriented towards improving the quality characteristics of the final product.

Studies conducted at the Fava R&D Laboratory, in collaboration with the University of Parma, have highlighted the advantages of the vacuum process – benefits common to both solutions, that set them apart from traditional lamination technologies. In particular, vacuum-packed fresh dough sheets display higher values of the red and yellow indices than those produced without the use of vacuum ([Chart 1](#)). The same colour differences are also confirmed after cooking: vacuum-packed product samples display a higher brightness and a higher yellow index, associated with a reduction in the red index ([Chart 2](#)).

Since the visual perception of colour does not always coincide with the instrumental values, the parameter ΔE – used to quantify the colour difference perceivable by the human eye – was also calculated. The comparison of the STD (standard) and TV (total vacuum) samples shows distinct differences in the fresh dough sheets which are still distinguishable after cooking ([Chart 3](#)).

From a rheological standpoint, compression tests on the fresh samples indicate that the dough-sheets produced under vacuum present significantly higher firmness and extensibility values than those laminated with conventional technology ([Chart 4](#)). The degree of vacuum applied during the kneading and lamination phases can also be modulated, allowing the characteristics of the dough to be adapted to specific production requirements.

The experimental results significantly document the performance of the Total Vacuum (TV) series dough sheeters, which are highly appreciated by numerous pasta factories both in Italy and abroad as an alternative to conventional systems.

PERFECT DOUGH SHEET CUTTING-EDGE TECHNOLOGY

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Chart 1 COLORIMETRIC ANALYSIS

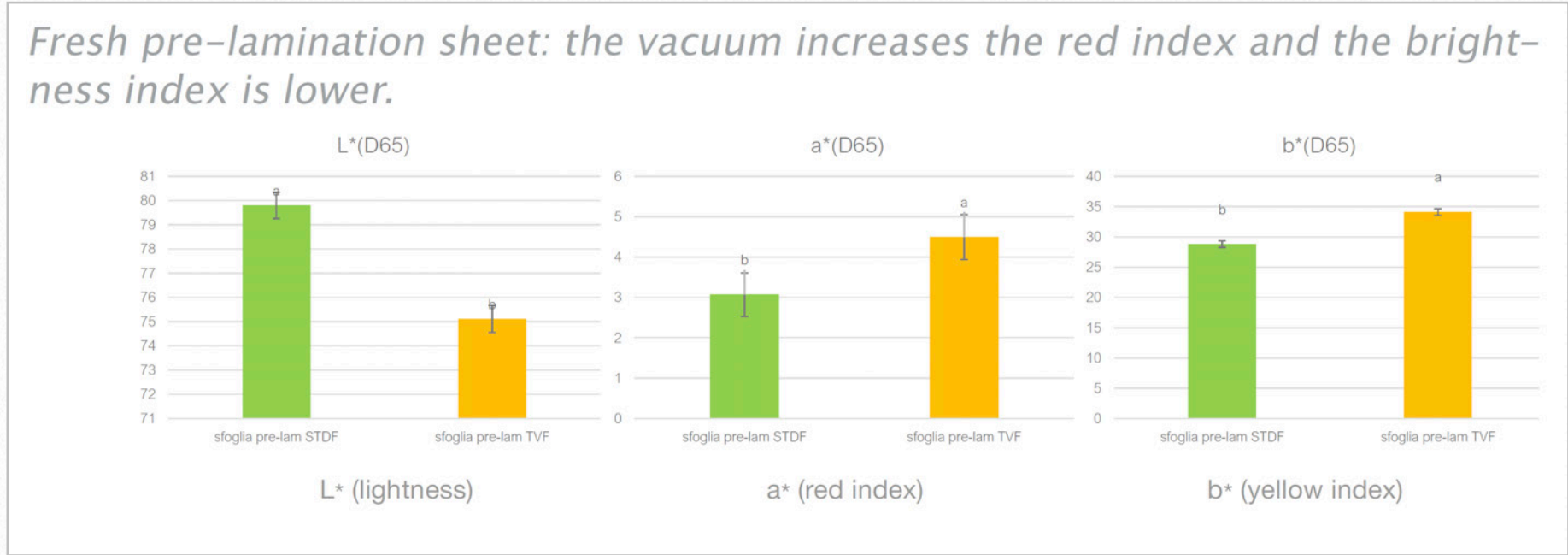


Chart 2 COLORIMETRIC ANALYSIS

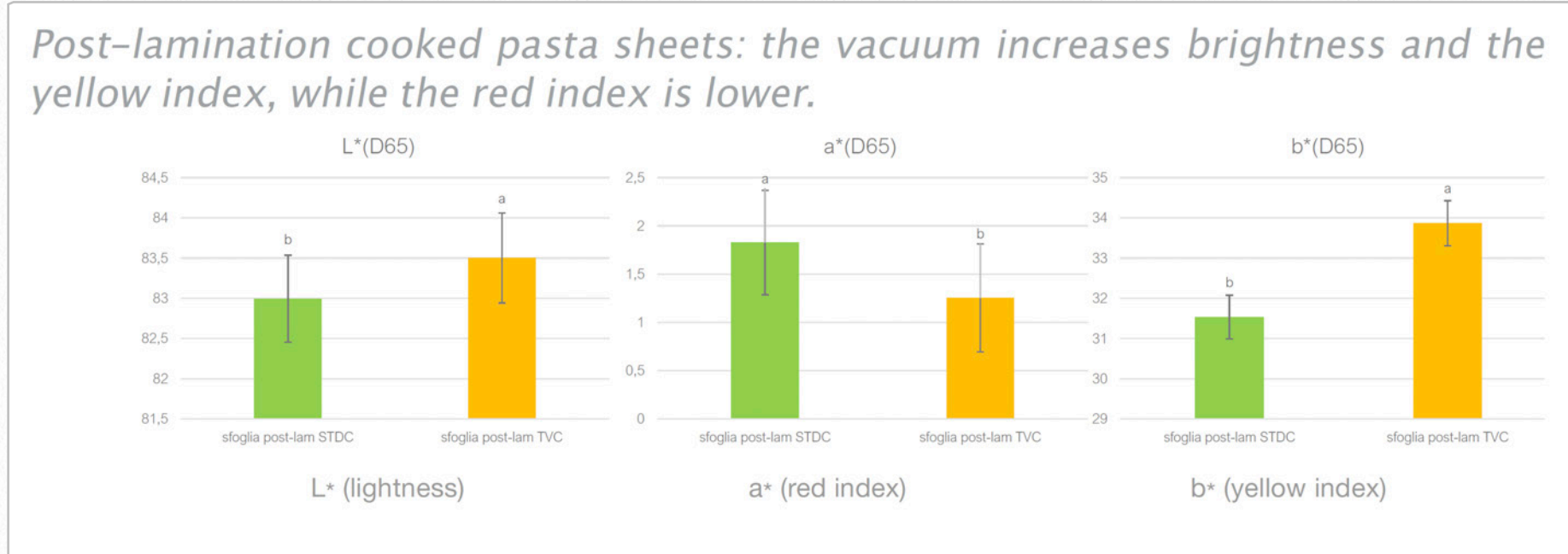


Chart 3 COLORIMETRIC ANALYSIS

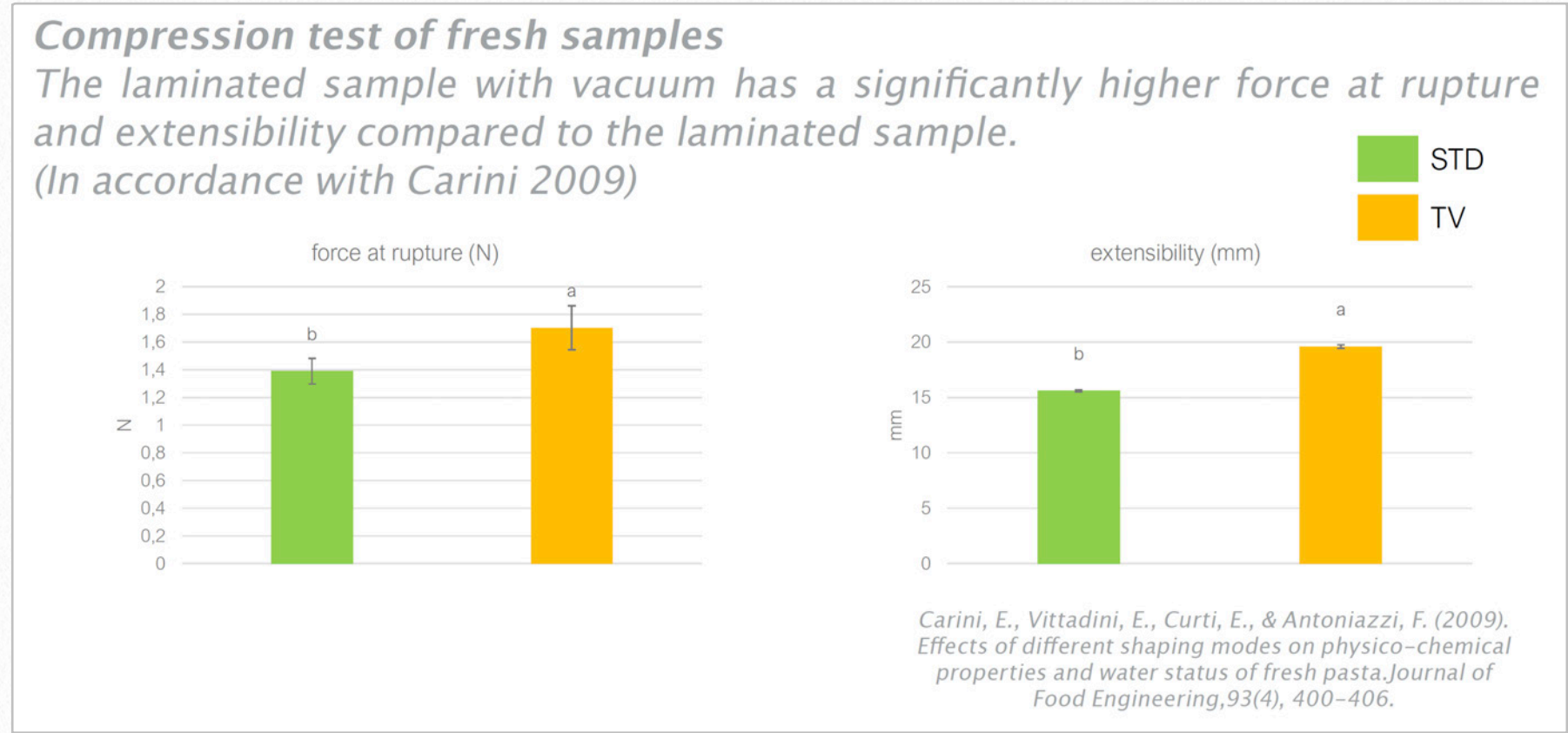
The perception of the human eye – results of ΔE values
Fresh pasta sheets samples: the colors are “strongly different”
Cooked pasta sheets samples: there is a “noticeable” color variation

Sample	ΔE
Pre-lamination sheet TVF (vs STDF) FRESH	7.2
Post-lamination sheet TVF (vs STDF) FRESH	6.7
Post-lamination sheet TVC (vs STDC) COOKED	2.4

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Chart 4 ANALYSIS OF CONSISTENCY



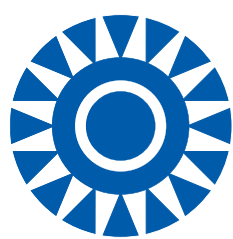
Operational reliability, product quality and ease of cleaning are features shared by both types in the range.

The STF TV HD – Total Vacuum Heavy Duty dough sheeter – is tailored for high-intensity production environments. Designed for heavy loads and continuous use, it is used for the production of long-cut pasta from dough sheets, filled pasta and in the processing of firm, compact doughs. The machine, developed for large-scale industry, is designed to operate fully automatically, without requiring continuous operator supervision. The dough sheet width varies from 540 to 1,200 mm, with an approximate fresh production capacity of between 200 and 1,400 kg/h.

For applications requiring softer dough sheets, particularly for the production of

filled pasta such as tortellini and ravioli, the VSF dough sheeter applies vacuum to the kneading system. Also in this case the machine can be operated in automatic mode, without requiring continuous operator supervision. The sheet width is between 250 and 540 mm, with a fresh production capacity of 250-500 kg/h.

Fava Storci will be exhibiting at Fiera Pastaria & Festival 2026. More detailed information on the vacuum dough sheeter will be provided at the stand.



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3



National Pasta Association hosts “From Plant to Plate” 2026 Annual Meeting

Press release



Sustainability, supply chain, and market scenarios took center stage at the event, with Pastaria as media partner.

The National Pasta Association (NPA) is hosting its 2026 Annual Meeting on March 15-17, 2026 at The Westin Savannah Harbor & Spa in Savannah, GA. The meeting offers a dynamic agenda of acclaimed speakers at this unique learning event. In addition, there will be ample networking opportunities during educational sessions, receptions and at the golf, pickleball and bocce tournaments to strengthen relationships between pasta producers, millers, ingredient suppliers, retailers, food service companies, and equipment manufacturers from around the world.

The 2026 NPA Annual Meeting will explore critical issues impacting the pasta industry, including the current economic landscape, market updates on durum wheat, the evolving legislative and regulatory environment, and sustainability related to the pasta industry. The meeting's theme, *From Plant to Plate*, highlights the essential role each segment the production process plays, from farmers producing high-quality wheat to the millers and pasta makers who transform it into the products consumers enjoy. By showcasing this full journey, the meeting underscores the industry's shared commitment to sustainability, innovation, and excellence in delivering nutritious, high-quality pasta to tables around the world.

"I'm excited to host the pasta industry for an event centered on critical issues shaping our future. This year's theme – *From Plant to Plate* – highlights the vital contributions of farmers, millers, pasta manufacturers and associate members, and how collaboration across the value chain fuels innovation and long-term industry success," said NPA Chair Nora Stabert.

Featured sessions during the event include:

- Durum Update
- Sustainability Panel
- Executive One on One's
- Legislative Update
- Economic Update.

To take part

For more information and to register for the NPA 2026 Annual Meeting visit:

<https://ilovepasta.org/about-npa/events/>



**NATIONAL PASTA
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2026 Annual Meeting

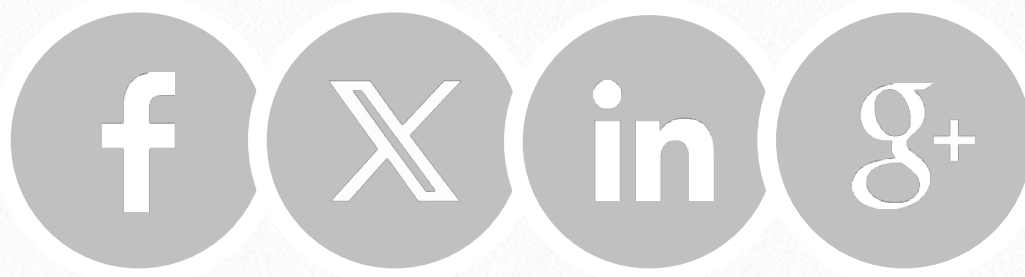
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4



Development of biodegradable films for dry pasta packaging

Mariamelia Stanzione¹, A. Marzocchella^{2,3}, R. Zullo¹, P. Suma⁴, C. Carfagna¹, G.G. Buonocore¹



From research on biopolymers to industrial applications in dry pasta packaging.

The aim of this article is to briefly present the research activities of two research projects BIOPOLPACK and Smart Packaging For Smart Living, developed within the framework of the National Operational Programme for Enterprises and Competitiveness 2014-2020 ERDF, Axis I – Innovation, Action 1.1.3, financed by the MISE (Ministry of Economic Development) through the Fund for Sustainable Growth – “AGRIFOOD” Scheme. The activities focus on the production of innovative biodegradable films for dry pasta packaging, with the aim of combining environmental sustainability, technical functionality and product protection.

The BIOPOLPACK project

The project “New materials for food packaging obtained by coating biodegradable polymer films with ‘PaperTouch’ varnish (BIOPOLPACK)” stems from the growing attention to environmental issues. In recent years, this heightened awareness has prompted the food packaging industry to seek more sustainable and innovative solutions. Stricter European regulations, coupled with increased consumer awareness, are obliging companies to look for alternative materials to traditional fossil-based plastic packaging. In this scenario, biodegradable

materials present a viable alternative to traditional polymers of fossil origin, contributing to the reduction of environmental impact and the promotion of a circular economy. But the use of these materials involves certain challenges, especially in terms of functionality and aesthetics. To be successfully implemented in the food industry, the new materials must, in fact, guarantee appropriate properties in terms of product protection, printability, mechanical strength and visual appeal.

One of the emerging solutions is the application of functional coatings, such as “PaperTouch” varnish, on biodegradable polymer films. This type of coating not only creates a paper-like effect to the touch, but also improves the mechanical, optical and processing characteristics of the materials, making them more competitive compared to conventional alternatives. The use of PaperTouch varnishes also makes it possible to obtain surfaces suitable for printing and laminating, without compromising the overall biodegradability of the packaging.

The project explored the potential of new food packaging materials, obtained by using exclusively biodegradable materials (adhesives, inks) and by coating with PaperTouch varnish, with the aim of contributing to the development of more



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environmentally-friendly and efficient food packaging solutions, in line with current market requirements and European legislation.

The study focused on the selection and use of various biodegradable and/or compostable polymer matrices already on the market for the agri-food sector, including PLA, starch and modified starch, PBS, cellulose-based materials and their blends. Both the source materials (granules and/or monolayer films) and the films obtained through industrial lamination of monolayer films using biodegradable adhesives were tested. The experimental characterisations concerned the study of chemical-physical properties (FTIR analysis), thermal properties (thermogravimetric and calorimetric analysis), barrier properties (water vapour and oxygen permeability under controlled relative humidity and temperature conditions), mechanical properties (tensile tests), and surface properties (contact angle), with the aim of identifying the most suitable materials for use in real-life conditions.

The results obtained enabled the development of innovative, fully biodegradable and compostable multilayer systems by optimising extrusion, lamination, printing and

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Figure 1 SUSTAINABLE PACKAGING MADE



bonding processes, with excellent final performance.

The optimal multilayer system selected consists of a film with an outer layer of polylactic acid (PLA), suitable for printing, and an inner heat-sealable layer of compostable, low-rigidity polyester. The material thus obtained was used to package dry pasta, which was then stored at room temperature on the shelves of a retail outlet for a period of 24 months. For the purposes of comparison, conventional biaxially oriented polypropylene (BOPP) packaging was used. Analyses conducted on the mechanical properties of the film, as well as on the surface structure of the pasta – both raw and after cooking – did not reveal any qualitative degradation of the product packaged with the biodegradable material. These results demonstrate the effectiveness of the film developed in ensuring the preservation and protection of

the food product over an extended period of time, confirming its validity as a sustainable alternative to traditional packaging.

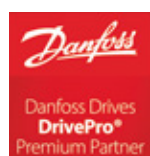
The Smart Packaging For Smart Living project

The Smart Packaging For Smart Living project includes, among its various activities, the development of active coatings on biodegradable films with insect-repellent properties targeting pests commonly found in pasta

In the agri-food sector, product protection along the entire supply chain – from production to consumption – is a crucial challenge, especially as regards dry foods such as pasta, which are subject to attack by insect pests such as *Plodia interpunctella* (Indian meal moth) and *Tribolium confusum* (confused flour beetle).



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These pests can jeopardise product quality, generate significant economic losses and undermine food safety.

Traditionally, pest prevention has relied on chemical methods or physical barriers in packaging systems. However, the increasing focus on environmental sustainability and consumer safety has driven research towards more natural solutions compatible with the principles of the circular economy. This includes the development of functionalised biodegradable films with active coatings capable of exerting a repellent effect against insect pests, without compromising the material's biodegradability or food safety.

The use of substances of natural origin, such as essential oils or selected volatile compounds like geranium, oregano, rosemary, citronella, star anise within active coatings applied on biodegradable substrates, offers a promising approach for developing intelligent and sustainable packaging.

The activities conducted as part of the project have enabled the development of new active packaging systems, in the form of polymer films or adhesive patches to be applied on commercial packaging, which have been shown through in vitro laboratory-scale tests to have an effective repellent action against pasta pests.

These innovative materials combine a protective function against pests with respect for the environment, thereby offering added value for producers and consumers alike.

Notes

1. CNR-Institute for Polymers, Composites and Biomaterials.
2. Nuova ErrePlast.
3. IFIS.
4. University of Catania.

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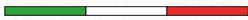
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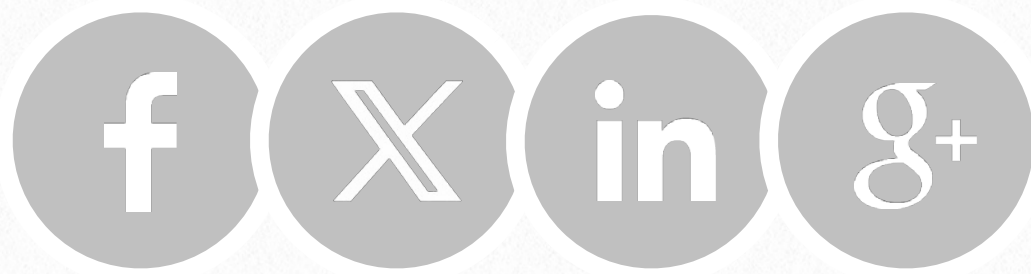


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5



The Abimapi Congress kicks off in Brazil

Press release



Latin America’s premier event for biscuit, pasta, bread and cake industries set for March 16–18 in Foz do Iguaçu.

From March 16 to 18, the city of Foz do Iguaçu (Paraná, Brazil) will host the 19th International Congress of Abimapi Industries (Brazilian Association of Biscuit, Pasta, and Industrialized Bread & Cake Industries). With over 40 sponsors and about 400 participants, the event consolidates itself as a vital hub for engagement among industry leaders, suppliers, and experts. The program includes technical content, networking and business matchmaking, all aimed at identifying trends and movements that will shape the food sector in the coming years. At the official opening on Monday 16, Gustavo Franco, one of Brazil's most influential economists, will deliver a significant analysis of the country's macroeconomic scenario. Recognized for his role in the Plano Real and for serving as President of the Central Bank (1997–1999), Gustavo will kick off the event with the keynote *Economic Perspectives for Brazil in 2026 and Beyond*. Following the lecture, Irineu J. Pedrollo (CEO of J. Macêdo) and Maurizio Scarpa (General Director of Barilla Brazil) will join the speaker for a debate. According to Claudio Zanão, Executive President of Abimapi, the year 2026 arrives with economic and political challenges that require a precise reading of the landscape by the industry. “Our Congress

was designed precisely to be this compass for the sector; that is why we have gathered the top leadership to present the market intelligence necessary for planning the next steps with confidence and competitiveness in the global scenario.”

Program highlights

The schedule highlights the intersection of the productive sector and public policy. The panel *The Food Industry at the Center of Politics* will feature Cristiane Lopes (Director of Government Relations at PepsiCo), Decio Novaes (National Manager of Corporate Affairs at Grupo BIMBO), Fernando Gamboa (Partner and C&R Sector Leader for South America & Brazil at KPMG), and Wagner Parente (CEO of BMJ consultancy), debating the year's regulatory and political challenges. The second panel, *From Product to Purpose: Value Beyond Industry*, will include an international lecture by Kantha Shelke, a U.S. expert in innovation and the international regulatory environment. Adriana Hartmann (General Manager of Mars Snacking Brazil) and Raphael Jiraschek (CEO of IBBT) will join to discuss sector innovations, key global food themes, and sustainability as a competitive advantage.



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participants

43

sponsors

30+

exhibition
booths

22

panelists

US\$ 3

million in revenue
generated during
the business
roundtables

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Check out the full schedule

abimapi

Brazilian Association of Biscuit, Pasta, and
Industrialized Bread and Cake Industries



Claudio Zanão, Executive President of Abimapi, at Fiera Pastaria & Festival 2024

In the third panel, *Basket in Motion: Reactive Consumption*, speakers Cássio Brandão (Head of Consumer Goods, Google) and Claudio Czarnobai (Latam Director, NielsenIQ) will analyze market performance, recent data from Abimapi Basket, consumer behavior, and key sector trends. This session will be moderated by Flavia Molinari (Executive Marketing Director, Camil) and Ana Carolina Teixeira (Executive Marketing & Trade Marketing Director, M. Dias Branco). By the end of the congress, insights will be delivered by the industry's leaders. Presidents of major companies in the sector, Massimo Bauducco (Bauducco), Ricardo Oliveira Selmi (Pastifício Selmi), and Rodrigo Garla (Marilan), will share the

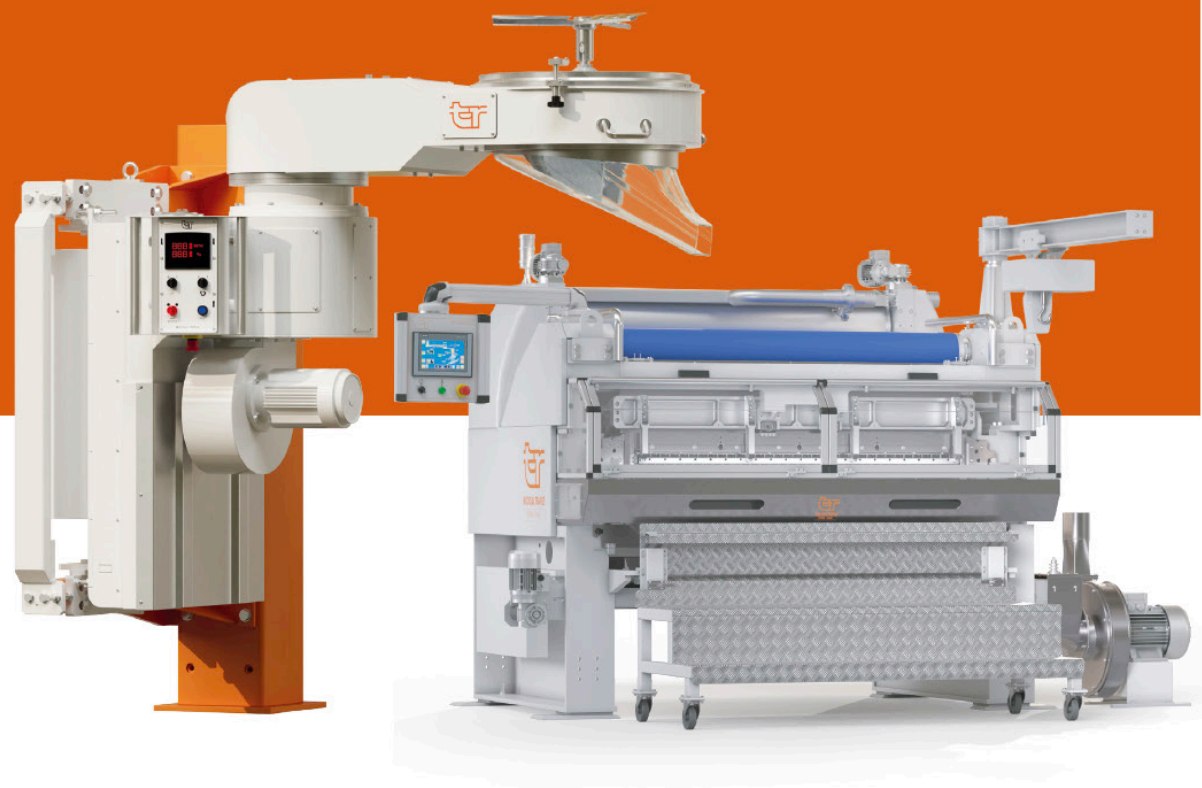
stage to discuss the industry's future perspectives in a debate on legacy, innovation, and market growth.

Networking and business

In addition to an executive overview, the Congress will provide insights into strategic solutions, including technical lectures on financial intelligence from StoneX, which will address risk management and hedging for essential commodities like sugar and cocoa. In the innovation and ingredients segment, Nagase do Brasil will discuss biotechnological convergence—merging sensory pleasure with sustainability—while AB Mauri will emphasize the consumer's



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voice as a guiding factor in new product development. To enhance efficiency on the factory floor, Beckhoff Automation will present automation solutions designed to boost industrial productivity.

The event's trade fair will showcase the sector's value chain, with more than 30 supplier companies sharing innovations and promoting networking among the industry's key decision-makers.

The program also includes the Exporta Mais international business round, welcoming 12 buyers from different regions of the world. In partnership with the Brazilian Trade and Investment Promotion Agency (Apex Brasil), this initiative aims to facilitate partnerships and expand international markets. The initiative

is also supported by the Federation of Industries of the State of Paraná (FIEP) and the Brazilian Council of Importing and Exporting Commercial Companies (CECIEX).

The social agenda, which includes dinners, cocktails and entertainment, has been planned to strengthen networking among the decision-makers present.

To take part

Registration for the 19th Abimapi International Congress is open on the [official website](#).

The registration package guarantees access to all panels, the trade fair, and social activities (cocktails and dinners). Special conditions apply for association members.

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6



Pastaria Festival 2026: two days to explore the future of pasta

Editorial team



Science, innovation, and industrial vision take center stage at the 2026 edition, scheduled in Florence on March 30–31, as part of Fiera Pastaria & Festival.

Pastaria Festival 2026, set to take place in Florence on March 30 and 31 within the framework of Fiera Pastaria & Festival, will unfold over two complementary days designed to meet the needs of different but deeply interconnected audiences: on one side, research, technology, and innovation; on the other, business, market dynamics, and the strategic vision of pasta producers.

Day 1: Science & Innovation Day

The opening day of the Pastaria Festival (Monday, March 30, from 9:45 a.m. to 6:00 p.m.) is dedicated to technical-scientific and academic conferences, with a strong focus on knowledge transfer to the pasta industry.

Researchers, universities, and research centers will present the latest findings in technology, ingredients, nutrition, and processing to supply chain professionals, alongside innovations from companies providing technologies, ingredients, and services.

The program is structured into three major academic sessions:

Measuring quality: methods, indicators, control

From wheat genetics to final product testing, this session covers quality across the entire supply chain. Topics include molecular traceability of wheat, tools to distinguish whole-grain from reconstituted products, the development of functional pasta and fortified starches, and a current industrial issue – MOSH and MOAH in paper and cardboard packaging – analyzed in terms of risks and possible solutions.

Rethinking pasta: ingredients, structures, processes

This session looks at product evolution through the lens of varietal innovation, nutrition, and sustainability. It explores changing technological properties of raw materials, functional legume-based pasta, Morphing Food models (2D to 3D transformation during cooking), and fermentation as an emerging biotechnology for creating functional ingredients.

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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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Fresh pasta: product, process, and preservation

The focus shifts to fresh pasta, with presentations on fortification, consumer-perceived quality, high-pressure processing (HPP), and active packaging—particularly the use of oxygen absorbers for product stabilization.

Alongside academic contributions, the day will feature presentations and conferences from supply chain companies, promoting direct dialogue between research and industrial application. Events are planned by Fava Storci and MartinoRossi, along with presentations by Clextal and SGS.

The *Science & Innovation Day* is especially aimed at:

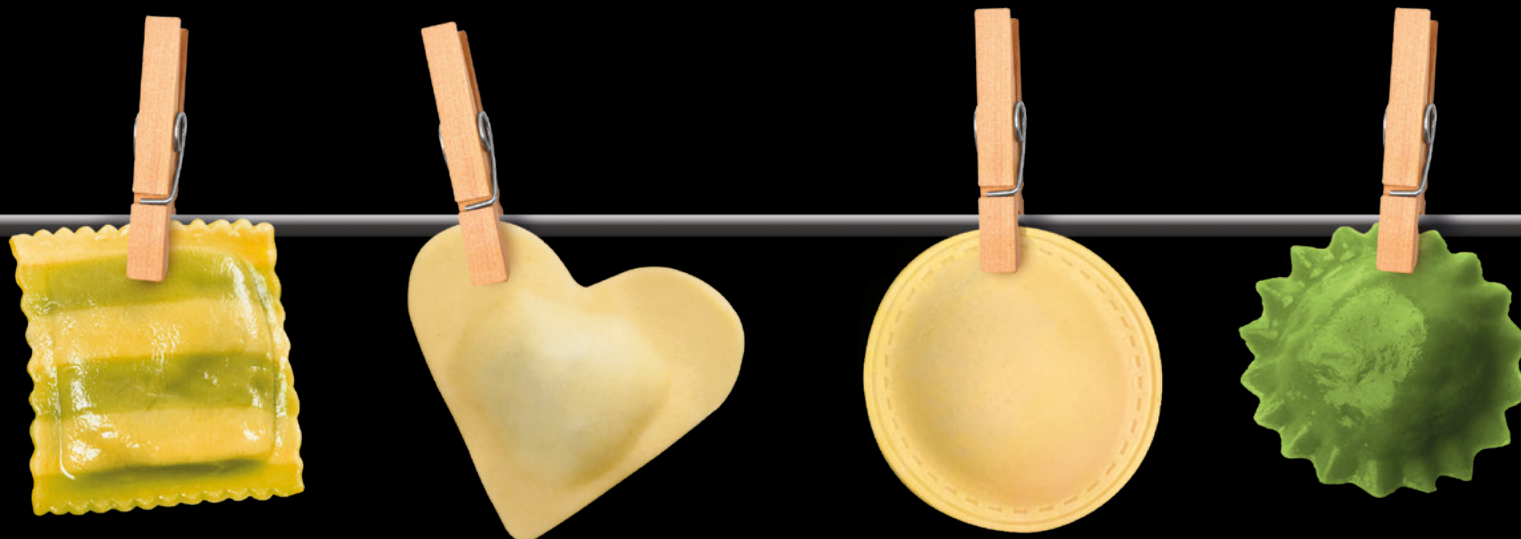
- R&D Managers
- Quality & Food Safety Managers
- Technical Directors
- Production Managers
- Purchasing Managers (for technologies and ingredients)
- Innovation Managers.

Day 2: *The Pasta Makers Day*

The second day of the Pastaria Festival (Tuesday, March 31, from 9:45 a.m. to 6:00

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p.m.) is *The Pasta Makers Day*, where pasta producers take center stage in a dialogue also open to mainstream media. This is the day dedicated to market trends, future scenarios, and the outlook for pasta, told directly by Italian and international producers, supported by analysts, experts, and representatives of industry institutions. Highlights of the planned sessions include:

Opening remarks by national and international industry association leaders.

Beyond tariffs: Italian pasta and new trade barriers

A roundtable on one of the most sensitive issues affecting global competitiveness.

The pasta of tomorrow: producers share their visions for the next decade, focusing on industrial strategies and global perspectives.

Global Pasta Outlook: consumption trends and the evolution of distribution channels
with insights from Circana and NielsenIQ.

The World Pasta Night
Preview of a special initiative

second
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and create new opportunities
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Pastaria

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TIMELESS PASTA MAKERS: A CALL TO HISTORIC PASTA PRODUCERS

In 2026, Pastaria will dedicate a special session of the Pastaria Festival to historic pasta producers who, over time, have contributed to the growth of the international pasta-making community.

Ahead of the 2026 edition, we invite pasta makers and pasta companies to notify us if, during the year, they will reach or surpass a historical milestone in their activity, starting from 50 years and in ten-year increments: 50, 60, 70, 80, 90, 100 years and beyond.

The initiative is open to both industrial and artisanal pasta makers, in Italy and abroad. It is not a competitive award, but a cultural acknowledgment dedicated to those who have turned production know-how into identity,

continuity, and value, contributing over time to the development of the sector. Pasta producers celebrating one of these anniversaries in 2026 are invited to inform the editorial team at Pastaria, providing:

- the name of the pasta company
- year of establishment
- milestone reached in 2026
- a contact reference.

Acknowledgments will be presented during the Pastaria Festival on March 31, 2026, in Florence, as part of Fiera Pastaria & Festival 2026.

Submissions must be received by February 20, 2026, by info@pastaria.it.

Pasta Cares

A presentation of charitable, social, and solidarity initiatives in which pasta and pasta makers play a central role.

The Italian pasta sector in financial statements: analysis and awards

Timeless Pasta Makers: honors for historic pasta producers

The Pasta Makers Day is especially geared toward:

- CEOs and entrepreneurs
- General Managers
- Marketing, Communication & Institutional Relations Managers
- Sales Directors and Export Managers.

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The full, detailed program for *The Pasta Makers Day* will be published soon on Pastaria.

How to participate

Participation in Fiera Pastaria & Festival 2026 is free and reserved for pasta producers, upon registration.

The free ticket grants access to:

- Both days of the Pastaria Festival (*Science & Innovation Day* and *The Pasta Makers Day*)

- The Fiera Pastaria exhibition area, showcasing technologies, ingredients, and services for pasta producers.

Tickets can be requested online at the official event website:

www.fierapastaria.com.

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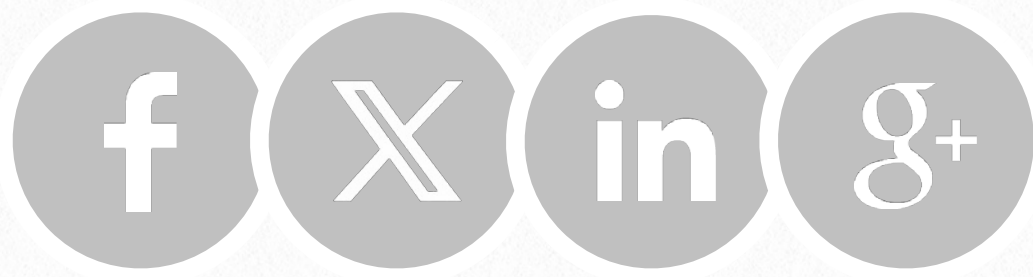
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7



Commodity price observatory 1/2026

Pastaria Centre for Economic Research



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

After the inflationary peak that marked the post-pandemic biennium (2022-2023), the global economy has been going through a phase of gradual cost-cutting. The drop in inflation, now widespread over all stages of trade, is also significantly affecting commodity prices, including agricultural and food products, helping to ease pressure on production costs and household purchasing power.

It is, however, a fragile rebalancing act, vulnerable to exogenous factors ranging from climate-related shocks, to geopolitical tensions and recurring bottlenecks in global logistics and supply chains.

Against this backdrop of easing price pressures, the global economy is slowing down and heading towards a phase of structurally weaker growth. According to the forecasts of the UN Department of Economic and Social Affairs, the global GDP is expected to grow by 2.7% in 2026, a slightly slower rate than in 2025 and well below the pre-Covid-19 pandemic average. The resilience shown in 2025, driven largely by consumer spending in advanced economies, does not erase the underlying weaknesses, manifested by still-compressed investment, narrow budget margins and high debt levels, factors that will continue to weigh on the medium-term outlook.

After a phase of high volatility, international trade flows have held up better than expected, but global trade is poised to experience an inevitable slowdown in 2026. The combined effect of macroeconomic uncertainty and more restrictive tariff policies is likely to slow down trade, with varying impacts according to region.

As for the GDP, advanced economies are expected to grow at a moderate pace, while emerging economies will continue to show greater dynamism, albeit in a framework exposed to financial and climate risks.

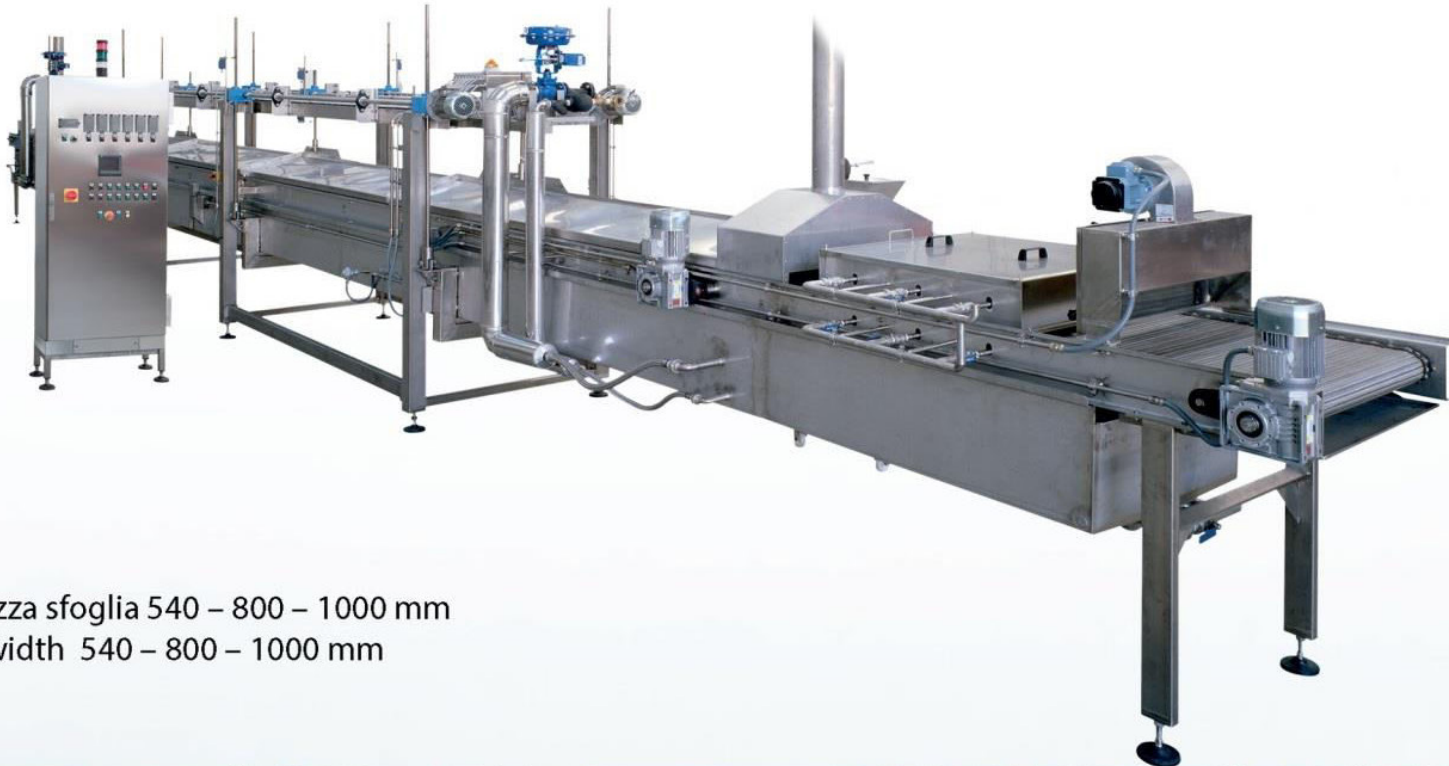
In Italy, the outlook remains particularly subdued. The Bank of Italy's estimates indicate a GDP growth rate stalled at +0.6% for 2026, with a further cooling of inflation. The labour market is showing signs of improvement, but the large share of economically inactive people remains a structural drag on growth, pointing towards very limited prospects for expansion in the medium- to long-term.

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For processing filled pasta, sheets with interleaf film, cannelloni, lasagne



Larghezza sfoglia 540 – 800 – 1000 mm
Sheet width 540 – 800 – 1000 mm



Sfoglie per lasagne
Lasagne sheets



Sforgia con interfoglio
Sheets with interleaf film



Cannelloni
Cannelloni

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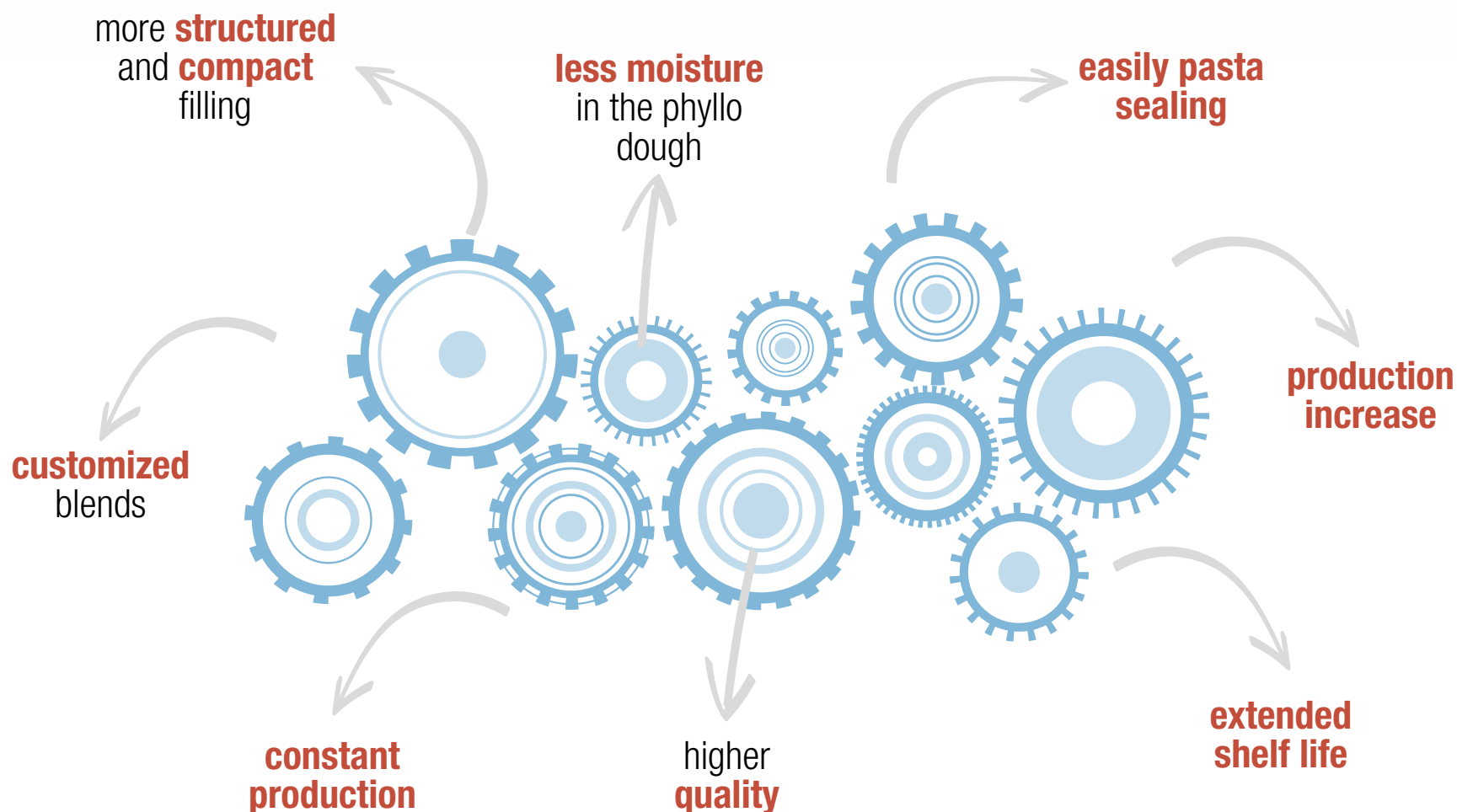
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PRICES AND TRENDS OF CERTAIN FOOD RAW MATERIALS (DECEMBER 2025)				
National fine common wheat	Price (€/ton)	Monthly variation	Annual variation	Forecast
	240.5	0.4%	-4.2%	=
Fine durum wheat from North Italy	Price (€/ton)	Monthly variation	Annual variation	Forecast
	278.5	0%	-12.3%	=
00 type common wheat flour	Price (€/ton)	Monthly variation	Annual variation	Forecast
	490	0%	-5.8%	=
Semolina above min. leg. req.	Price (€/ton)	Monthly variation	Annual variation	Forecast
	542.5	0%	-8.4%	=
Eggs M	Price (€/100 pcs)	Monthly variation	Annual variation	Forecast
	20.2	0.2%	11.6%	▼
Pork hams for Prosciutto 12 kg and over	Price (€/kg)	Monthly variation	Annual variation	Forecast
	4.92	-4.1%	-3.3%	▼
Beef – veal meat half-carcass, prime quality	Price (€/kg)	Monthly variation	Annual variation	Forecast
	8.38	3.2%	26%	▲
Raw milk	Price (€/100 kg)	Monthly variation	Annual variation	Forecast
	34.08	-26.7%	-45.6%	▼
Centrifuged butter	Price (€/kg)	Monthly variation	Annual variation	Forecast
	4.46	-17.6%	-42.2%	▼
Grana Padano aged for 9 months or more	Price (€/kg)	Monthly variation	Annual variation	Forecast
	9.74	-3%	-7.2%	▼
Extra virgin olive oil	Price (€/kg)	Monthly variation	Annual variation	Forecast
	7	-3.3%	-26%	▼
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
	124.3	-0.6%	-2.4%	▼
Hard Red Winter US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	242.8	-1.2%	-3.7%	=
Mais, U.S. No. 2 Yellow FOB US Gulf port	Price (USD/ton)	Monthly variation	Annual variation	Forecast
	205.7	1.8%	1.5%	=
Fao Food Price Index, Hard Red Winter, Mais: December 2025				

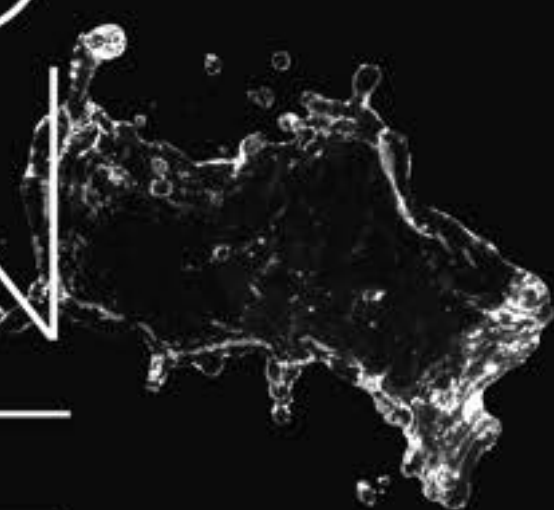
In this context, a new scenario is developing, marked by the physiological delays in the transmission of deflationary developments, which could, over a period of six to nine months, lead to a gradual improvement in the macroeconomic picture, through the prices-to-consumption channel, without, however, altering the country’s overall outlook for only moderate economic growth.

Across borders, international food commodity prices continue to move along a trajectory of gradual normalisation, albeit with differentiated trends between the various sectors. In December 2025, the FAO Food Price Index recorded a slight month-on-month decrease, settling at lower levels than both a year ago (-2.3%) and, especially, compared to the peak reached in March 2022 (-22.4%). The overall direction was driven mainly by dairy

prices, along with meat and vegetable oils. For cereals, in contrast, December brought an unexpected month-on-month rebound in prices – against a backdrop of heightened uncertainty, especially over the physical shipments of wheat from the Black Sea – and an upswing of trade in maize, with purchases also extending to the non-food biofuels market, most notably in the US and South America. The projections are not, however, a cause for concern, nor do they suggest an inflationary path later in the season. On the contrary, ample grain stocks in the warehouses of the major exporting countries and good harvests in Argentina and Australia will continue to exert downward pressure, a trend expected to continue at least until the summer. Of note, in this regard, is the fact that average prices in 2025 fell to their lowest since 2020, but against a backdrop of still-high



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costs and discontent among producers – particularly in Europe – concerned about pressure from non-EU supply and the possible implications of progressive tariff cuts under trade agreements with Mercosur countries.

Dynamics concerning the other commodities are also predominantly disinflationary. Vegetable oils hit a six-month low in December, with declines for soybean, rapeseed and sunflower, only partly offset by the slight recovery of palm oils. Olive oils also dropped, reflecting an imbalance now evident after two years of a production deficit in Europe that had pushed prices to all-time highs.

With regard to meat, which continues to retrace, conditions only remain favourable for beef cuts, in a market still constrained by certain supply shortfalls and a structural shortage of cattle on European farms.

Egg prices are still feverishly high, although the latest increases are now more contained and limited to a few tenths of a point on the month-on-month basis – heralding a gradual normalisation.

The most notable development, however, remains the sharp turnaround in dairy prices after a period of strong inflationary pressures. The rebalancing of supply and demand, attributable to the seasonal increase in production in Europe and

Oceania and the accumulation of stocks, combined with fragmented international demand, explains the sharp reversal in prices, with more pronounced declines for butter and milk powder, the products more exposed to global trade dynamics.

In Italy, the correction in international price lists has exerted significant downward pressure on farm-gate milk prices. In December, the spot price of raw milk on the Milan market fell almost 27% in a month and 46% year-on-year. Centrifugal butter also took a nosedive, in a market that has also turned negative even for Grana Padano, which is down by more than 7% year-on-year.

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8



Reversal on tariffs: US lowers customs duties on Italian pasta

Editorial team



US authorities have revised the proposed rates downward in the ongoing antidumping investigation, with a final decision expected in spring 2026.

The year 2026 opens with important news for Italian pasta: the United States has decided to revise downward the antidumping duties on Italian pasta, thereby avoiding a measure that would have heavily penalised exports.

What happened

In 2025, the US Department of Commerce launched an antidumping investigation into several Italian pasta producers, proposing additional duties of up to 91.74% on top of the standard 15% tariff applied to imports from the European Union – a measure that could have pushed the total burden above 107% for certain products.

However, during the preliminary review of the duties, the US authorities decided to drastically reduce the tariffs.

The new rates, that range from 2.26% to 13.98%, were announced in advance of the final conclusion of the investigation, expected on 11 March 2026, and will not come into force until the final decision is published.

Reactions and outlook

The Italian Foreign Ministry and Government have attributed the reduction to diplomatic efforts and the defensive submissions presented by Italian institutions and companies, underscoring

the importance of safeguarding one of the most strategic export markets for Italy's pasta industry.

Italian pasta exports to the United States reached an estimated € 670–800 million in 2024, confirming the importance of the American market for the sector.

Why it is important

By revising the duties downward, the US authorities have eased the potential pressure on prices and on the competitiveness of Italian pasta, substantially reducing the risk of exclusion from the US market and giving Italian exporters some breathing room at a time when attention is concentrated on international trade dynamics.

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SALE DE
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Production costs and average production costs: what is changing for the Italian durum wheat supply chain

Luigi Cristiano Laurenza
Director of the Legal, Economic and Internationalisation Area and Secretary General of Pasta Makers – Unione Italiana Food



Unione Italiana Food authorises Pastaria to publish this note, drafted for associated pasta makers, which analyses the regulatory framework of Italian Legislative Decree 198/2021 and the intervention of ISMEA.

Regulatory framework

The determination of “average production costs” by ISMEA falls within the legal framework on unfair trading practices laid down by Italian Legislative Decree No. 198 of 8 November, 2021. The measure implements Directive (EU) 2019/633 on unfair business-to-business trading practices in the agricultural and food supply chain and Article 7 of Italian Law No. 53 of 22 April 2021 on the marketing of agricultural and food products.

The measure distinguishes between “average production cost” and “production cost”.

Article 2, lett. o-bis) and o-ter) contain the definitions of “average production cost” and “production cost”.

o-bis) “average production cost”: this is the average cost of production of agricultural and food products set by ISMEA (Institute of Services for the Agricultural Food Market) on the basis of the methodology it developed itself and communicated to the Ministry of Agriculture, Food Sovereignty and Forests;

(o-ter) “production cost”: this is the cost for the use of raw materials, for factors, both fixed and variable, and for any services necessary for the production process carried out with the techniques prevalent in the area of reference.

The concept of “average production cost” refers to a determination by ISMEA on the basis of its own methodology, using average market variables, while that of “production cost” has a subjective, and therefore variable, value as it refers to the individual seller on the basis of said seller’s specific variables.

In the decree, as well as in the definitions, reference is made:

- to “production costs”:
 - in Art. 3, para. 5, which prescribes that “Without prejudice to the provisions of Articles 4 and 5, contractual conditions are safeguarded, including those relating to prices established in compliance with the production costs incurred as referred to in Article 2, para.1, lett. o-ter) defined in the context of framework agreements concerning the supply of agricultural and food products entered into by the most representative professional organisations at national level represented in at least five Chambers of Commerce, Industry, Crafts and Agriculture, or in CNEL (National Council for Economics and Labour), also



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through their territorial and sectoral branches”.

- in Art. 5, para. 1, lett. b), which states that “The following trading practices are also prohibited:

a) (*omissis*)

b) the imposition of excessively burdensome contractual conditions on the seller, including the sale of agricultural and food products at prices below the costs of production;

- to “average production costs” under Article 7 (Regulation of below-cost sales), “where it is provided, in paragraph 3, that: In the event of violation of the provision set forth in paragraph 1, (on the prohibition of below-cost sales) the price established by the parties shall be automatically replaced, pursuant to Article 1339 of the Italian Civil Code, by the price resulting from the purchase invoices or, where the purchase invoices cannot be verified, by the price calculated on the basis of the average production costs recorded by the Institute of Services for the Agricultural Food Market - ISMEA or, where this is not available, by the average price charged for similar products on the relevant market.”

Therefore, the “cost of production” constitutes an unfair trading practice when the sale has taken place below that threshold, whereas the “average cost of

production” serves as an alternative tool to purchase invoices for establishing the correct price in the case of “below-cost sales”. Such sales are governed by special legislation with its own rules and exemptions¹.

Unfair trading practice: selling below “production costs”

In light of the legal framework outlined above, the unfair trading practice consists of imposing excessively burdensome contractual conditions on the seller, including that of selling agricultural and food products at prices below production costs.

The concept of production costs must, therefore, subjectively refer to the seller’s costs, which may be higher or lower than the “average production costs”.

The practice is described in Art. 5, para. 1, lett. b) and the sanction for its violation – unless the act constitutes a criminal offence – laid down in Art. 10.6 of Italian Legislative Decree 198/2021, is up to 3% of the turnover achieved in the last financial year preceding the finding. The sum of the sanction is determined with reference to: the benefit received by the party who committed the violation; the extent of the damage caused to the other contracting



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party. In any case, the sanction cannot be less than €10,000.

Effects of ISMEA's determination of the “average production costs” of durum wheat: replacement of the lower agreed price with that resulting from the “average production costs” and related sanction

The most immediate application of ISMEA's determination of average production costs will occur, as already mentioned, in the case of below cost sales¹. Article 7 of Italian Legislative Decree No. 198/2021, in fact, provides that in the event of violation of the prohibition on below-cost selling (except in cases where it is permitted²), the price established by the parties is automatically replaced by the price resulting from the purchase invoices or, where the purchase invoices cannot be verified, by the price calculated on the basis of the average production costs recorded by ISMEA, or, where this is not available, by the average price charged for similar products on the relevant market. In the case of durum wheat, therefore, ISMEA's determination of average production costs (ranging, north

to south, from €30.2 to €31.8 per 100 kg) allows, in the event of a below-cost sale, the replacement of the lower agreed price. In addition to replacement of the price, Article 10.9 of Italian Legislative Decree No. 198/2021 provides, by way of sanction, that anyone who carries out below-cost sales of agricultural and food products outside the cases provided for under Article 7 be punished with the administrative sanction referred to in Article 5, paragraphs 2 and 3, of Italian Presidential Decree No. 218 of 2001 (from 1 to 6 million Lire and in the case of particularly serious or repeated offences, the suspension of sales activity for a period not exceeding twenty days).

Possible questions related to the application of the legislation

In the light of the above-mentioned legal framework, the guidelines of Unione Italiana Food and other factual and legal aspects, the following considerations are made.

Nature and derogability of the “average production costs”

The average production cost set by ISMEA does not in itself constitute a non-derogable minimum price, since in cases of below-cost sales it serves as an



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alternative mechanism for replacing the sales price in cases in which verification against invoice prices is not possible. Furthermore, it is always possible, especially in long term contracts (bearing in mind that Italian Legislative Decree 198/2021 provides for a minimum contractual term of 12 months), to negotiate on different bases and provide, also depending on the quality of the grain, incentive mechanisms. It is, therefore, possible for a virtuous wheat producer operating with lower costs, in the presence of a clear and transparent framework contract in accordance with the legislation, to sell at lower prices than the average production costs, both because such sales do not constitute the practice of selling below production costs and because they do not fall within the definition of below-cost sales. For the same reasons related to the meaning and role of average production costs, it seems acceptable to enter into multi-year or supply chain contracts that envisage future price determination formulas (see page 8 of the Unione Italiana Food guidelines) also through instruments such as futures, stock exchange averages and other mechanisms, even if, in certain periods, the prices calculated in this way, fall below ISMEA's average production costs. In the same way, supply-chain contracts entered

into under public programs (PNRR, CAP, national funds) do not necessarily have to be renegotiated if the agreed price turns out to be lower than the new ISMEA average costs subsequently published.

Possible anti-competitive concerns of “average production costs”

Average production costs come into play, as already mentioned, in the case of below-cost sales, when the price resulting from the purchase invoices is not available, and serve as a reference for replacing the agreed price. Therefore, once again, due to the very nature of average production costs, a minor difference between the average costs determined for the central-south and central-north of the country is not considered as constituting anti-competitive discrimination between players operating in the same national market. The determination of average costs does not prohibit the purchase of wheat at a price below the average cost set by ISMEA. Bear in mind that what is forbidden is the practice of buying below average production costs or selling below cost. An assessment relating to possible anti-competitive concerns would have to be made in such a case – albeit with evident difficulties – with reference to the structure of Italian Legislative Decree 198/2021, not to the determination of

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average costs by ISMEA, which has already been provided for since the date the law entered into force.

Commencement of the effectiveness of average production costs

Given that the regulation has been in force since 15/12/2021 and that, therefore, already since that date, sales below production costs and below-cost sales have been considered unfair practices, the parameters set by ISMEA can be used (for below-cost sales) as of, and not prior to, the date in which they were determined (6 October 2025).

Possible areas of contention regarding the methodology used by ISMEA

The methodology adopted by ISMEA to determine average production costs may be challenged if supported by sound technical/scientific/agrarian/economic arguments.

Commodity exchange operations and determination of average costs for other products

The weekly market prices of the Commodity Exchanges will continue to operate as long as the Exchanges remain active. It is not possible at this stage to predict whether and in what way commodity exchange prices will be

affected by ISMEA's average costs, which – bear in mind – are intended as a reference for the purposes outlined above. The determination of a minimum price for durum wheat could be accompanied by a similar regulation for processed products (semolina, flour, pasta, bread). ISMEA has already launched studies and investigations in this regard but, as things stand, no specific decision has been made to finalise them or to make them official and thus operational.

Scope of application of average production costs

Article 1.2 of the measure states that its provisions apply to the sale of agricultural and food products by suppliers that are established in the national territory or by suppliers that are established in other Member States or in third countries when the purchaser is established in Italy.

According to the Unione Italiana Food guidelines on unfair trading practices, the term “established suppliers” (see p. 4) refers to the place of business (not the legal headquarters). Cross-border sales are, therefore, protected under the principle of the “supplier’s jurisdiction”. Thus, if the supplies are made by a company in the national territory, they fall within the scope of the measure and its rules apply with precedence even over conflicting ones, in

favour of the supplier established in the national territory. The provisions of Articles 3, 4, 5 and 7 (trading practices and below-cost sales) constitute mandatory regulations and prevail over any conflicting sectoral regulations, irrespective of the law applicable to the contract of sale of agricultural and food products. Any agreement or contractual clause contrary to the aforementioned provisions shall be null and void. The nullity of the clause does not entail the nullity of the contract. Italian Legislative Decree 198/2021 applies within the national territory, so the legislation does not apply (and neither do the average production costs determined by ISMEA) in cases where the transfer of raw materials or products takes place outside the national territory, such as in the case of imports from abroad.

Responsibility for declarations of origin

Declarations concerning the origin or provenance, nutritional properties and characteristics of the product and raw materials are made under the responsibility of the producer whose name appears on the marketed product (Art. 8, Reg. 1169/2011). The latter may, of course, in the context of establishing actual liability, prove the responsibility of third-party suppliers. It is up to the supervisory authorities to verify the veracity of these

statements and the applicable regulations do not provide for any specific document that serves as proof thereof.

Sanctions imposed on the buyer for sales at reduced costs and for below-cost sales

Among the main objectives of the measure under examination is the introduction of a minimum level of protection for the weaker party in the relationship, whereby it is considered that in the case of sales below production costs and below-cost sales, liability and sanctions shall fall upon the purchaser. This circumstance was also clarified, albeit with reference to a different violation, in the 2022 Report on Activities to Combat Unfair Trading Practices, drafted by the Central Inspectorate for Quality Protection and Fraud Repression of Agri-food Products of the Ministry of Agriculture Food Sovereignty and Forests.

Notes

1. The term below-cost sale refers, pursuant to Article 1.1, Italian Presidential Decree 218/2001, to the sale to the public of one or more products at a price lower than that resulting from the purchase invoices plus value-added tax and any other tax or duty related to the nature of the product, less any discounts or contributions attributable to the product itself, provided that they are documented, according to the definition contained in Article 15, para.7 of Italian Legislative Decree No. 114 of 31 March 1998.
2. See Art. 2, Italian Presidential Decree 218/2001.



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10



Pastaria Awards for thesis research: 2026 winners announced

Editorial team



The winners of the 2026 Pastaria Award for the best doctoral and master's theses on pasta have been announced. With this initiative, Pastaria aims to recognize the work of young graduates and researchers.

The evaluation committee has revealed the winners of the 2026 edition of the Pastaria Award for the best master's and doctoral theses on pasta, an initiative that reaffirms Pastaria's commitment to promoting scientific research applied to the pasta sector.

The award is intended to acknowledge the contributions of young researchers who, through their studies, address key issues for the evolution of the supply chain: raw material quality, production processes, nutritional value, sustainability, and product shelf life.

Master's Thesis Awards

For the 2026 edition, the Pastaria Award for master's theses was granted to two papers analyzing the impact of technological processes on the nutritional and structural quality of pasta.

The first award goes to Cristian Tardini (University of Bologna) for his thesis *Effect of the production process on bioactive compounds in dry pasta: from raw materials to final product*. The research analyzes the evolution of phenols, antioxidant activity, and tocopherols from raw material to both standard and enriched pasta, highlighting that while the production process partially reduces bioactive compounds, enriched pasta retains higher levels than pasta made solely from semolina.

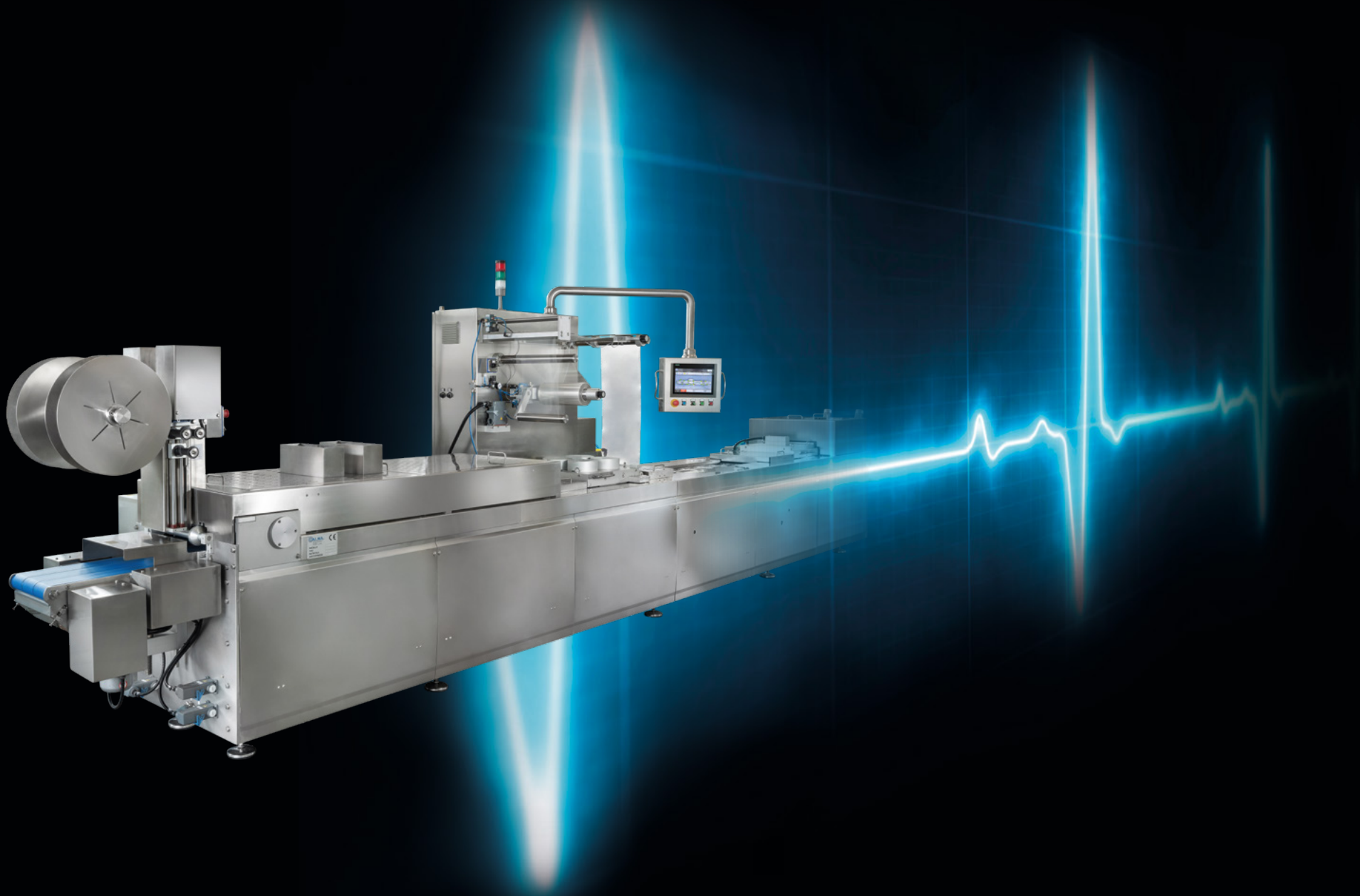
The second award was given to Imma De Sena (University of Naples Federico II) for her thesis *Evaluation of the effect of thermal drying treatment of pasta using proteomic approaches*. Conducted as part of the PRIN CALIMERO project, the study investigates how drying conditions affect protein structure and digestibility, emphasizing the role of semolina quality in the interaction between raw material and process.

Each winner of the master's thesis award receives € 400 and a certificate issued by Pastaria.

Doctoral Thesis Award

The 2026 Pastaria Award for the best doctoral thesis was awarded to Flavia Dilucia (University of Foggia) for her dissertation *Valorization and recycle of*

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vegetable by-products for the formulation and study of high health value food products to extend their shelf-life.

The research explores the valorization of vegetable by-products through an innovative, non-thermal, and solvent-free method aimed at producing functional ingredients for fortified foods. The results show improvements in the chemical, microbiological, and sensory properties of the products, highlighting sustainable practices and circular economy approaches of particular interest to the pasta sector.

The doctoral award includes a € 700 prize and a certificate issued by Pastaria.

Award ceremony and publication

The award ceremony will take place during Fiera Pastaria & Festival 2026, scheduled in Florence on March 30–31, confirming the event's role as a meeting point for industry, research, and innovation.

As in previous editions, the winning research will also be featured in summary scientific articles published in Pastaria, offering readers insights into the most significant outcomes of academic research applied to pasta.

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