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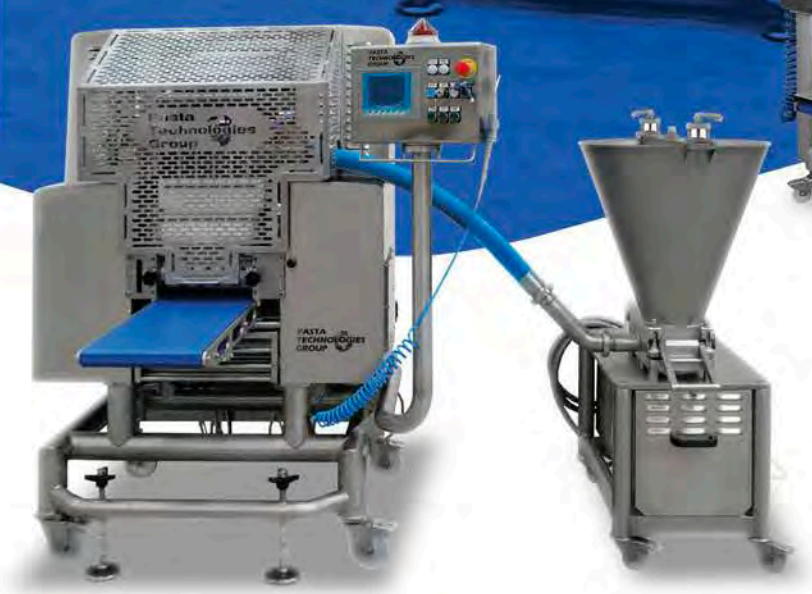

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1

Durum wheat: ample global supplies, but not without market tensions

Carlotta De Pasquale
Areté



Areté's analysis presented at World Pasta Day 2026, during a session introduced by Jaume Mas of Grupo Gallo. Global production and stocks are increasing, but crop quality, tensions in cereal markets and the outlook for 2027 sowings are fuelling uncertainty. Pastaria was the Main Media Partner of the event.

The 2026/27 durum wheat marketing year is characterised by overall abundant global supplies, with world production exceeding consumption for the third consecutive year and stocks estimated at their highest levels in more than fifteen years.

This is what emerges from Areté's analysis, based on data available as of 26 October 2026 and presented at World Pasta Day 2026, held in Parma the following day.

These fundamentals are helping to keep prices at relatively low levels, close to the multi-year lows recorded in the previous marketing year. However, the market faces several significant challenges that could affect price trends in the coming months.

In particular, our analyses highlight how abundant supplies in quantitative terms do not necessarily translate into an equally abundant availability of high-quality durum wheat. Crop quality, particularly in North America and the Mediterranean region, is a matter of concern for industrial users.

Added to this are tensions in other cereal markets, developments in the macroeconomic environment and uncertainties surrounding the upcoming sowings, all of which could alter the current market balance.

The macroeconomic environment: energy, exchange rates and logistics costs

To properly understand developments in the durum wheat market, it is first necessary to consider the broader macroeconomic environment in which it operates.

Agricultural commodity markets continue to be affected by international geopolitical tensions, fluctuations in energy prices and changes in transport costs.

Trends in oil and natural gas prices directly and indirectly influence agricultural production costs through the energy used in farming operations and fertiliser prices, as well as affecting industrial processing and logistics costs.

Exchange rates represent another important variable. Following the strengthening of the euro against the dollar in 2025, we observed a reversal of this trend in 2026, with the European currency weakening.

For a region such as the European Union, which is structurally a net importer of durum wheat, this factor is particularly significant: a weaker euro increases the cost of dollar-denominated purchases, assuming international prices remain unchanged.

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Ocean freight rates can also affect the relative competitiveness of different origins. Rising transport costs may put geographically more distant suppliers at a disadvantage and favour, at least temporarily, those closer to the main destination markets.
These factors help explain why agricultural commodity prices may come under upward pressure even when production fundamentals are relatively favourable.

The global supply and demand balance: a third consecutive year of surplus

Based on our analysis of International Grains Council (IGC) data, we estimate that global durum wheat production in the 2026/27 marketing year will increase by approximately 1% compared with the previous season.
Overall growth reflects differing trends across the main producing regions. The larger crops estimated in North Africa, Turkey and Mexico offset the declines recorded in Canada, the European Union and the United States.
Global consumption is also estimated to be increasing, but production remains above demand, resulting in a further accumulation of stocks.
This is the third consecutive marketing year characterised by a production surplus, with ending stocks estimated at their highest levels in more than fifteen years.
At the same time, we estimate a contraction in international trade. The recovery in production in North Africa and Turkey is significantly reducing import requirements in these regions, while Canada and the United States have lower exportable supplies than in the previous marketing year.
The global picture therefore appears broadly favourable in quantitative terms. However, to assess its implications for prices, it is necessary to examine the situation in the main producing and exporting countries in greater detail, considering not only the volumes available but also crop quality characteristics.

Canada: high stocks, but lower crop quality

Canada remains the world’s leading exporter of durum wheat, accounting for approximately 62% of international trade. According to estimates from Agriculture and Agri-Food Canada (AAFC), Canadian production in the 2026/27 marketing year is declining, mainly as a result of a

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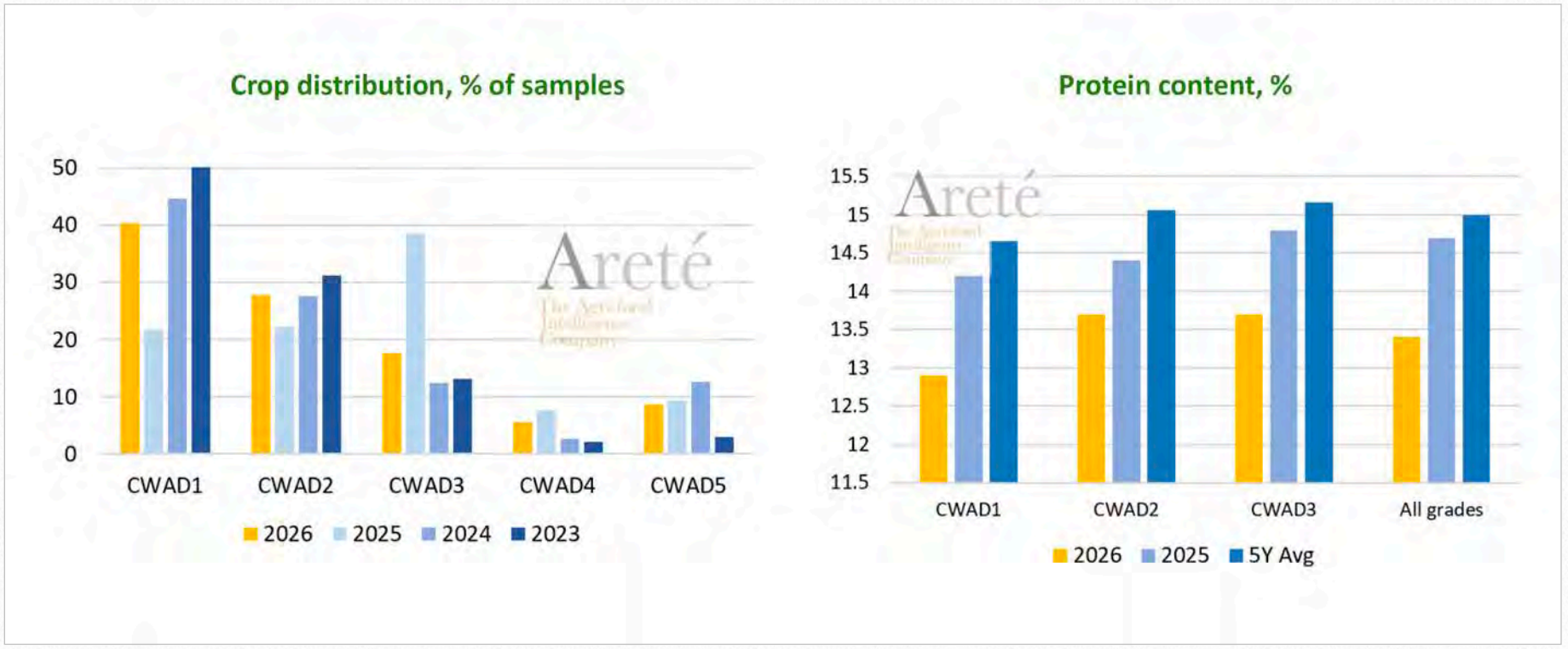
Chart 1 CANADIAN CROP QUALITY



Distribution of quality grades and trends in protein content. Source: Areté analysis of Canadian Grain Commission data, as of 6 October 2026.

reduction in planted area and yields closer to historical averages.

Despite this decline, the crop remains 20% above the average of the past five years.

The abundant supplies accumulated over previous marketing years also allow ending stocks to remain high, with estimates pointing to their highest level since 2018/19.

The main concern, however, relates to crop quality.

Rainfall recorded in late summer slowed harvesting operations and contributed to several quality issues.

According to data from the Canadian Grain Commission, the average protein content of Canadian durum wheat stands at 13.4%, compared with 14.7% in the previous marketing year.

Test weight and vitreousness are also factors contributing to quality downgrading.

The available survey data therefore indicate a lower relative availability of higher grades, despite overall abundant volumes.

It is important to emphasise that the quality data presented refer to the samples analysed as of the survey date and are not necessarily representative of the entire crop.

Nevertheless, the available indications highlight a significant issue for industrial users: the availability of high-protein durum wheat may be more limited than



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suggested by the overall quantitative supply and demand balance.
In the United States, according to estimates from the United States Department of Agriculture (USDA), production is declining, while high beginning stocks are limiting import requirements.
Quality data for Northern Durum indicate a higher protein content than in last year’s crop, although accompanied by a slightly lower test weight.

European Union: declining production and persistent import requirements

In the European Union, according to European Commission data, durum wheat production in the 2026/27 marketing year is declining, mainly as a result of a reduction in planted area.
This development is part of a long-term trend that has progressively reduced the EU’s production potential.

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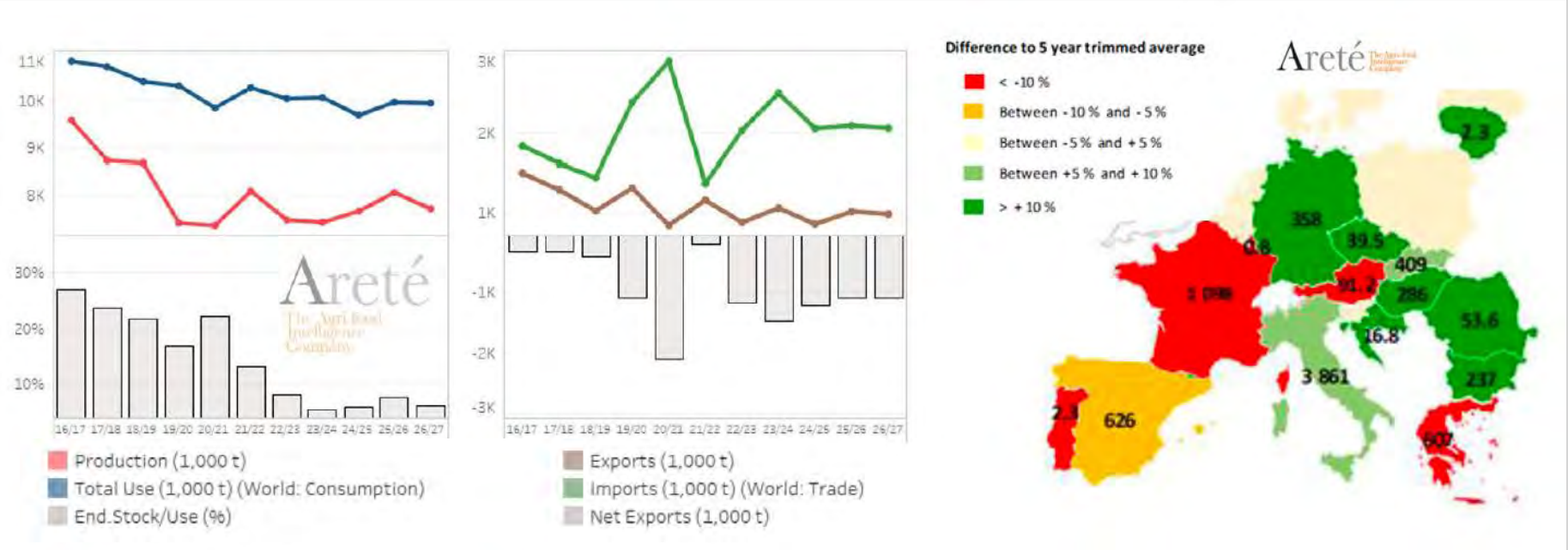
Chart 2 THE EUROPEAN UNION DURUM WHEAT MARKET



Trends in production, consumption, imports, exports and stocks, with a geographical breakdown of production conditions. Source: Areté analysis of European Commission data.

With consumption remaining broadly stable, lower production is keeping import requirements high.

Another factor to consider is crop quality. Our analyses indicate relatively low protein levels in several important producing regions, particularly southern Italy, Spain and Greece.

The quality situation in France, by contrast, is more favourable.

These differences are contributing to increased European demand for high-quality durum wheat, particularly in terms of protein content.

As of 18 October 2026, EU imports were 22% higher than in the same period of the previous marketing year.

The European situation therefore highlights how overall global availability alone is insufficient to describe market balances. For industrial users, access to the grades required by their production processes is just as important as the total volumes available globally.

North Africa: production recovery reduces imports

North Africa is one of the main factors behind the estimated contraction in international durum wheat trade.

Based on our analysis of IGC data, we estimate a significant recovery in production in the 2026/27 marketing year, supported by an expansion in planted area

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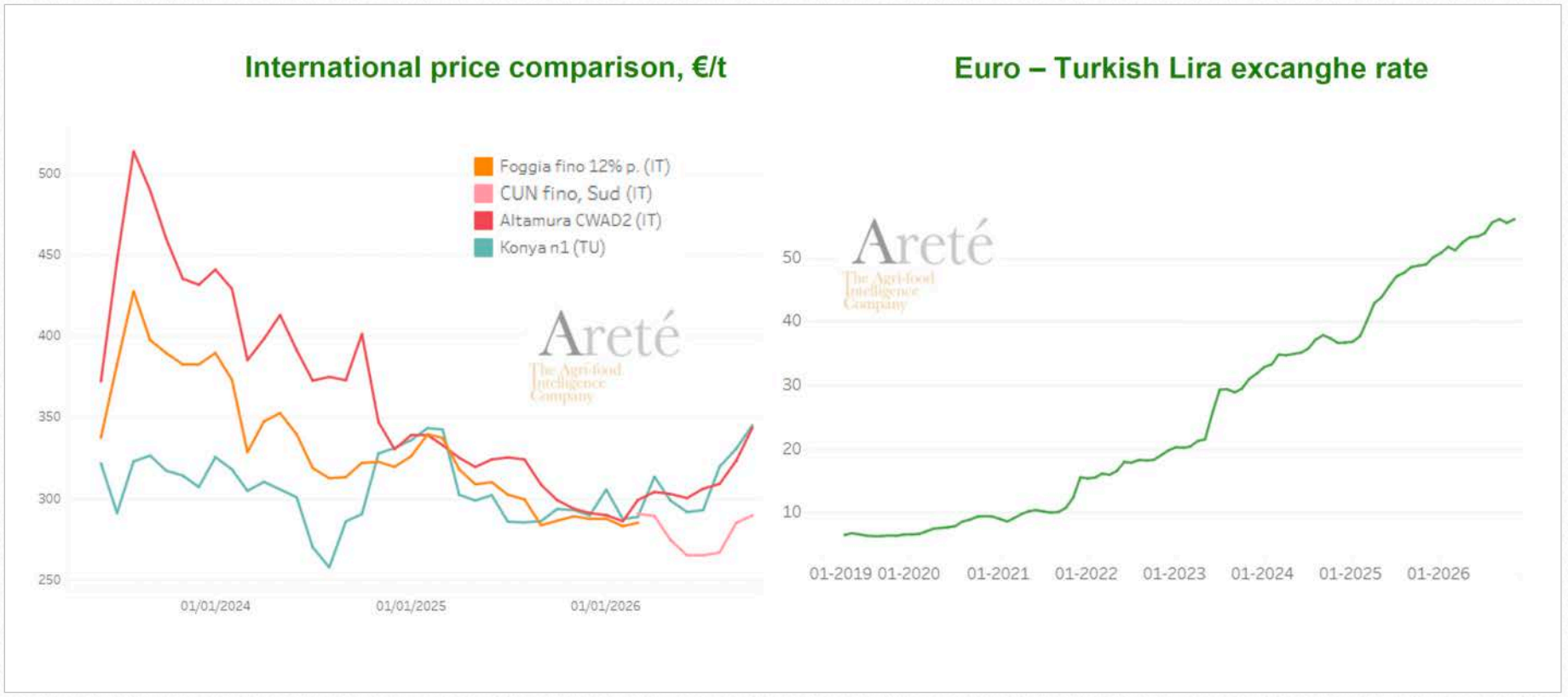
Chart 3 THE COMPETITIVENESS OF TURKISH DURUM WHEAT



Comparison of international prices and trends in the euro/Turkish lira exchange rate. Source: Areté analysis of market data; exchange rate data from XE.

and generally favourable weather conditions, particularly in Morocco and Algeria.

Production in the region is close to historical highs.

Consequently, import requirements are estimated to decline sharply, reaching their lowest levels since the 2021/22 marketing year.

Here too, however, it is necessary to distinguish between quantitative availability and product quality.

High yields may be accompanied by lower protein levels, making imports of higher-quality durum wheat necessary nonetheless.

Another factor to monitor is government procurement policies.

International tenders remain an important instrument for several North African countries and may influence trade dynamics even when domestic crops are abundant.

Tunisia, for example, had already issued a tender for the purchase of 100,000 tonnes of durum wheat.

Turkey: abundant supplies and a possible return to exports

Durum wheat production in Turkey is also estimated to increase in the 2026/27 marketing year, mainly thanks to improved yields.

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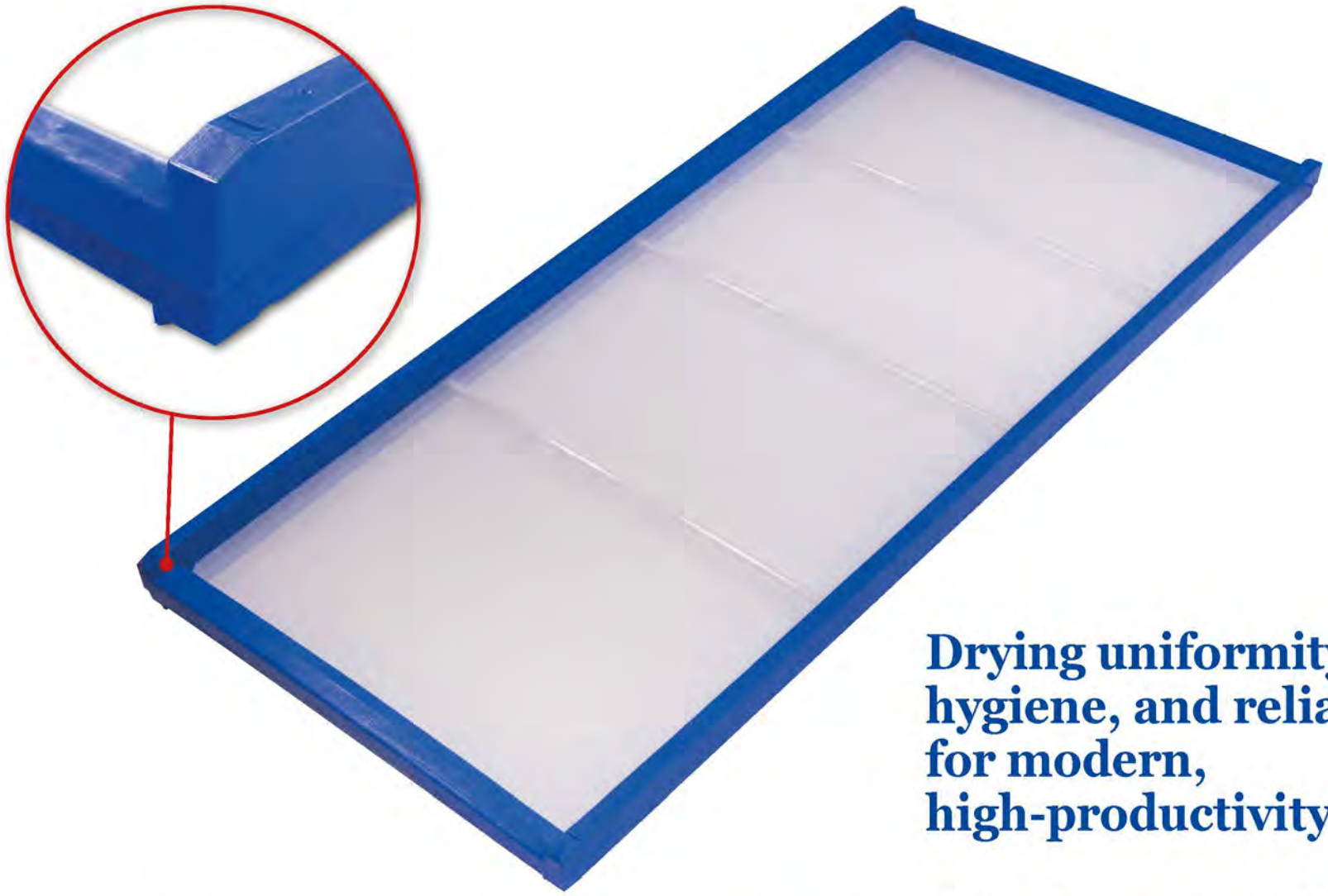

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Abundant domestic supplies are reducing import requirements, which remain concentrated primarily on high-protein grades.
The country could therefore return to being a net exporter in the 2026/27 marketing year.
However, Turkish durum wheat prices are relatively uncompetitive compared with those of the main international origins.
Exchange rate developments could alter this situation.
A further depreciation of the Turkish lira would make domestic wheat more competitive in foreign markets.
Similarly, an increase in ocean freight costs could improve the relative competitiveness of Turkish wheat compared with Canadian wheat, particularly for buyers in the Mediterranean region.
The public agency TMO will continue to play a decisive role, as its decisions regarding purchases, stock management and marketing directly influence developments in the domestic market.

Russia and Kazakhstan: the impact of logistical constraints

Russia and Kazakhstan are also among the origins to monitor, having assumed a more significant role in international durum wheat trade in recent years.
For both countries, estimates indicate a decline in production in the 2026/27 marketing year, linked to reductions in planted area and yields.
Their export capacity also continues to be affected by significant logistical constraints.
Kazakhstan, in particular, is landlocked and relies on infrastructure and transport corridors passing through other countries, primarily Russia.
Difficulties affecting transport connections and Black Sea shipping routes therefore limit the ability to market the crop.
These factors help explain why the availability of wheat in certain geographical regions does not automatically translate into competitive supplies in the main importing markets.

Durum wheat prices close to multi-year lows

The 2025/26 marketing year was characterised by a widespread decline in durum wheat prices across the main international markets.
Abundant global supplies helped drive prices down to their lowest levels since 2019.

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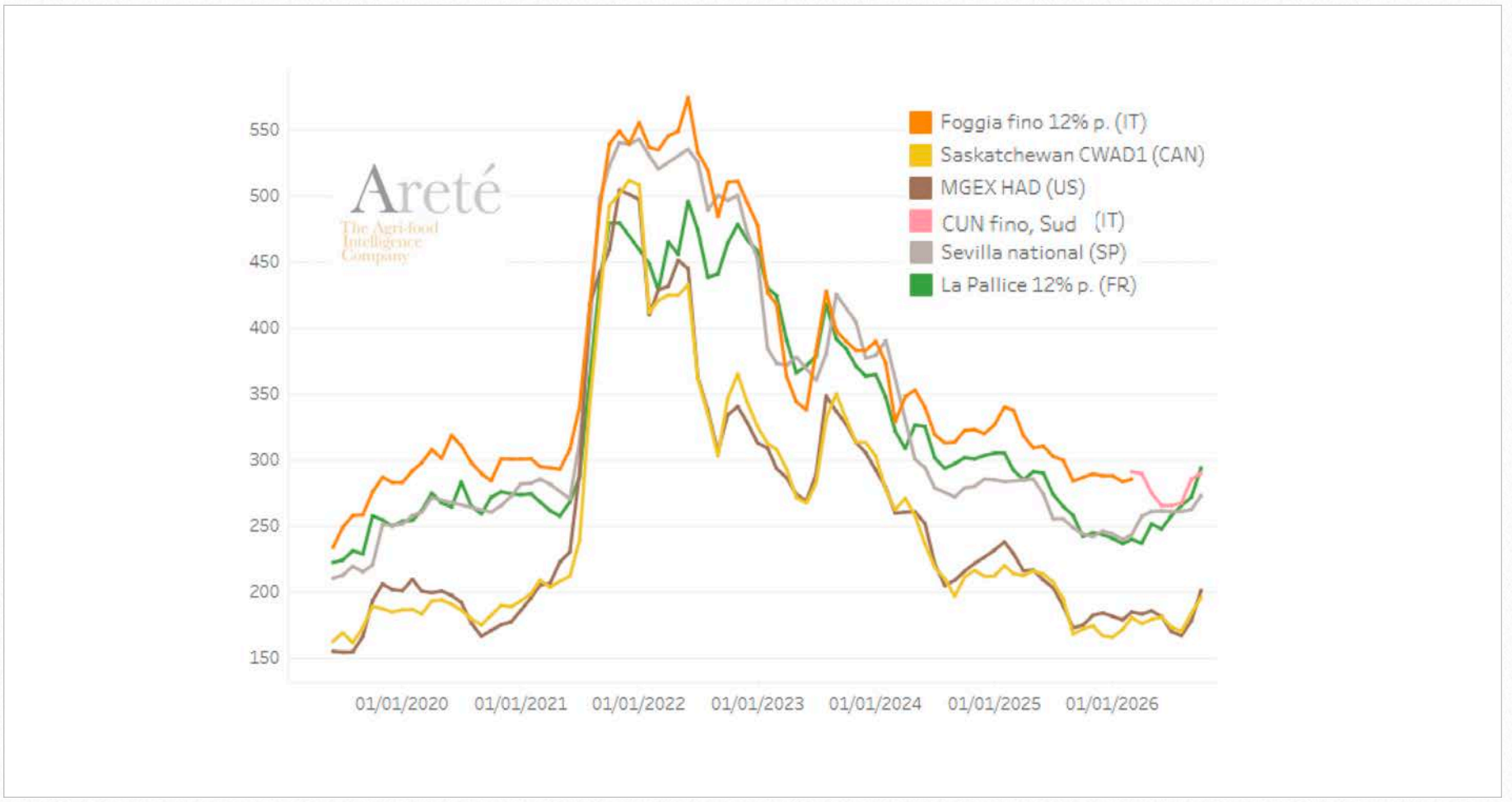
Chart 4 INTERNATIONAL PRICE TRENDS



Durum wheat price trends across the main international markets. Source: Areté analysis of market data.

With the start of the 2026/27 marketing year, we observed a partial reversal of this trend, with prices recovering in Europe and North America.

Price increases were mainly supported by lower supplies in certain producing regions, concerns about crop quality and upward pressure from the common wheat market.

Despite these movements, durum wheat prices remain close to the multi-year lows reached in the previous season.

A particularly significant indicator is the price differential between durum wheat and high-protein common wheat.

In Italy, during the first part of the 2026/27 marketing year, this differential stands at €9 per tonne, 82% below the average of the past five years.

In France, too, the durum wheat premium is particularly low, with a price differential 64% below the five-year average.

In Spain, the differential has fallen to its lowest level since 2018.

An even more unusual situation has emerged in North America, where common wheat has traded at higher prices than durum wheat since the beginning of 2026.

Recent market movements are gradually reducing this imbalance, although the differential has yet to return to historical levels.

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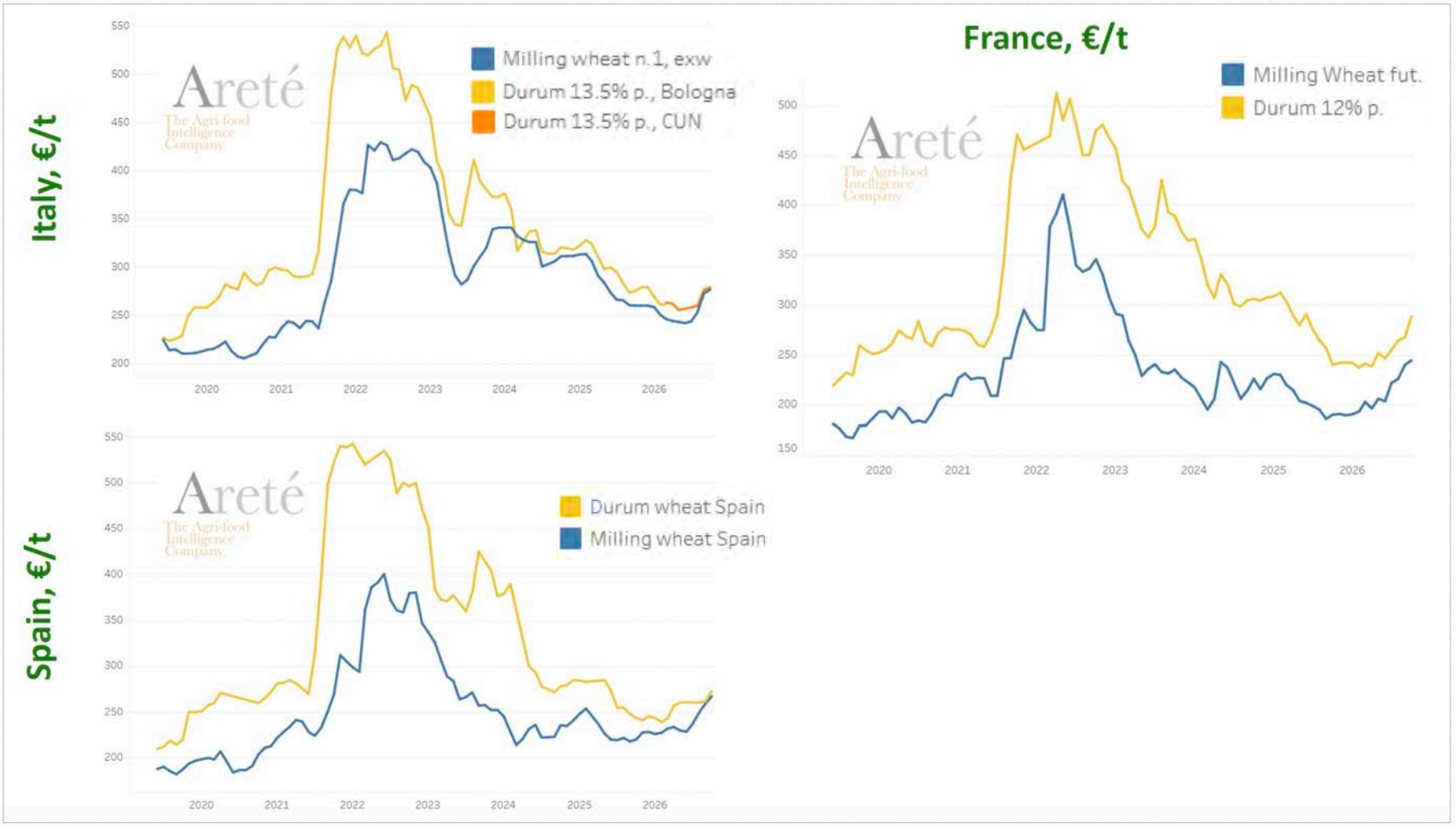
Chart 5 THE PRICE SPREAD BETWEEN DURUM AND COMMON WHEAT IN EUROPE



Source: Areté analysis of market data.

Quality could become a key price driver

Trends in average prices, however, do not provide a complete picture of price dynamics.

Indeed, one of the factors we consider most important for the coming months is the potential evolution of price differentials between the various grades of durum wheat.

As we have observed, the global market is characterised by abundant supplies in quantitative terms, but these supplies are not evenly distributed in terms of quality.

In particular, indications from the Canadian crop and certain Mediterranean regions point to lower protein levels than in the previous marketing year.

This situation could lead to higher relative demand for high-protein durum wheat against a backdrop of more limited availability.

This could, in turn, result in wider price premiums for higher grades.

In other words, a well-supplied global market could continue to experience specific supply tensions for high-quality durum wheat.

For industrial users, this means that trends in average prices may not fully reflect changes in the procurement costs of the most sought-after grades.

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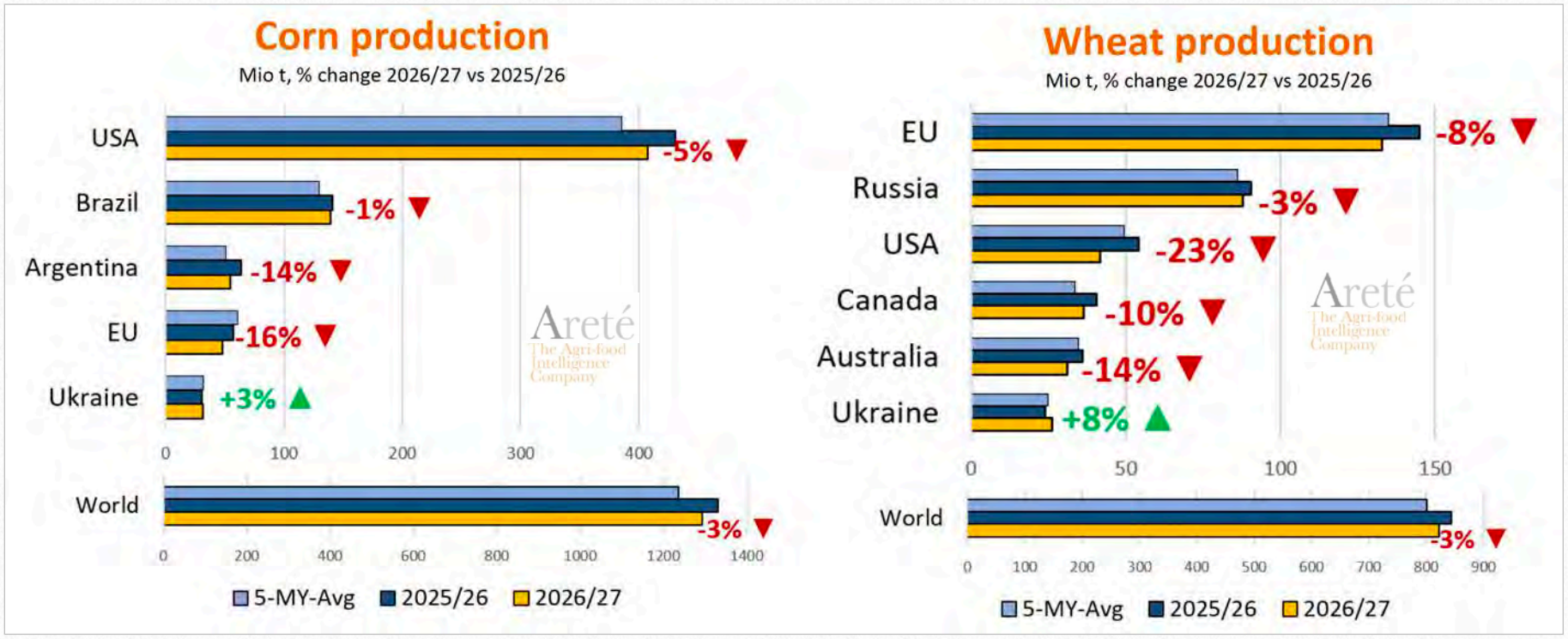
Chart 6 CORN AND WHEAT PRODUCTION CHALLENGES



Estimated changes in harvest volumes in the main producing countries in the 2026/27 marketing year compared with the previous year. Source: USDA.

Tensions in other cereal markets may support the durum wheat market

Another factor to consider is the interaction between the durum wheat market and other cereal markets.

In the 2026/27 marketing year, both maize and common wheat are experiencing global production deficits, following estimated declines in output in several major exporting countries.

The situation for European maize is particularly critical.

The summer drought significantly reduced production prospects, with the crop estimated at its lowest level since the 1990s and consequent import requirements close to historical highs.

These difficulties are occurring against a backdrop of severe constraints on cereal exports, also linked to the intensification of the conflict between Russia and Ukraine and logistical difficulties in the Black Sea region.

In the analysis presented, considering the first few months of the 2026/27 marketing year, Ukraine's total exports of cereals and pulses were down by 25%, while a 48% decline was indicated for Russia's total wheat exports.

These percentages therefore refer to the total exports of the two countries, rather than exclusively to volumes shipped through the Black Sea. Considering only



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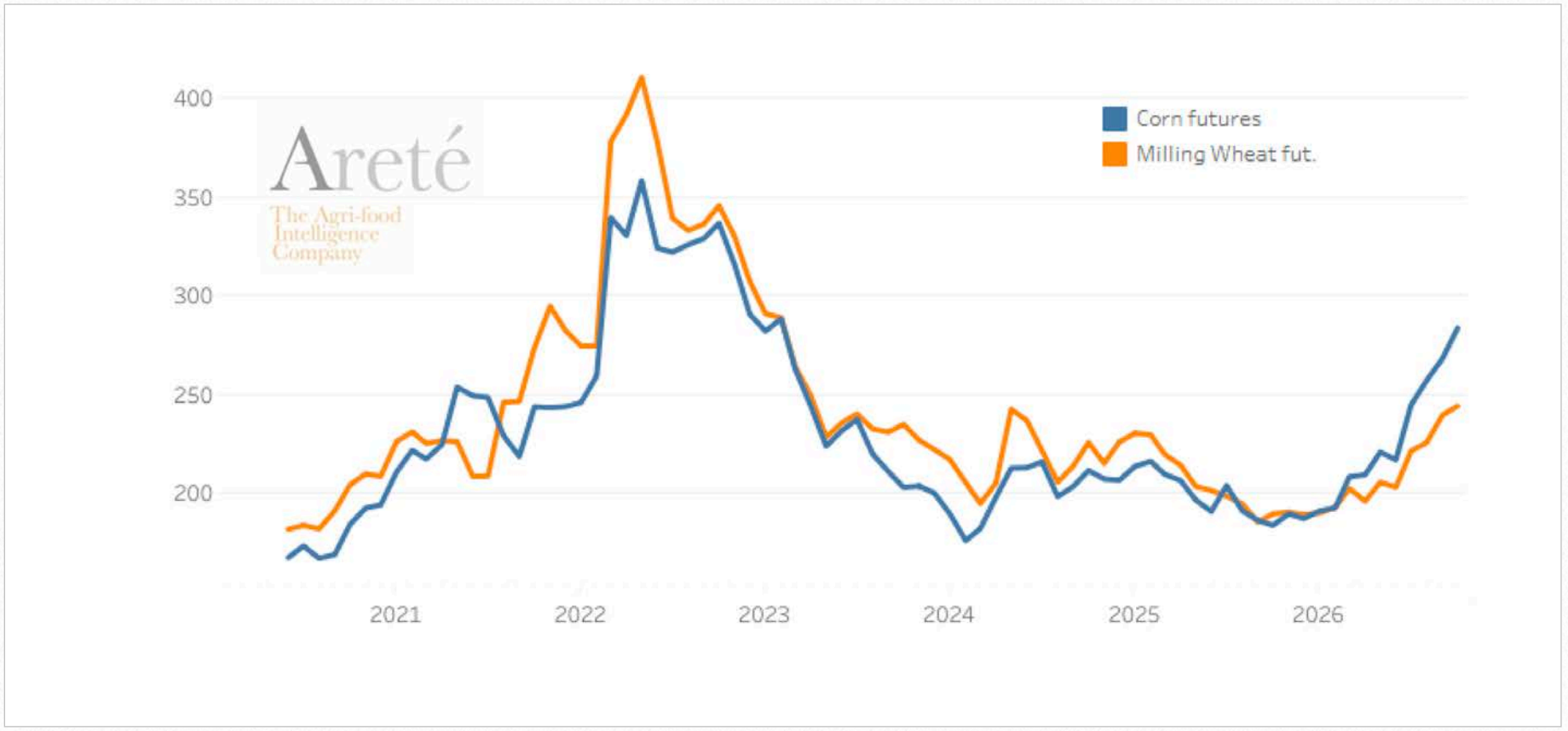
Chart 7 **THE RECOVERY IN EUROPEAN PRICES OF OTHER CEREALS**



Trends in Euronext corn and milling wheat futures.

the latter, the decline would be more pronounced.

Alternative routes via the Danube, the European Union's land borders and other logistics corridors are unable to fully replace the volumes normally handled by Black Sea ports.

The combination of lower production, increased import requirements and logistical difficulties has supported European maize prices, with effects gradually spreading to the common wheat market.

The latter is also benefiting from stronger export demand in a context where logistical difficulties are limiting Russian supplies.

For durum wheat, these dynamics represent a potential source of price support, despite relatively abundant supplies in its own market.

2027 sowings: what is the outlook for planted area?

Looking ahead to the next marketing year, one of the main sources of uncertainty concerns planting decisions.

In the Mediterranean region, autumn and winter sowings are affected by soil moisture conditions, which have proved problematic in several important producing regions.

In particular, the lack of rainfall observed in France and, locally, in Italy and Spain may delay sowing operations and increase risks for the next crop.



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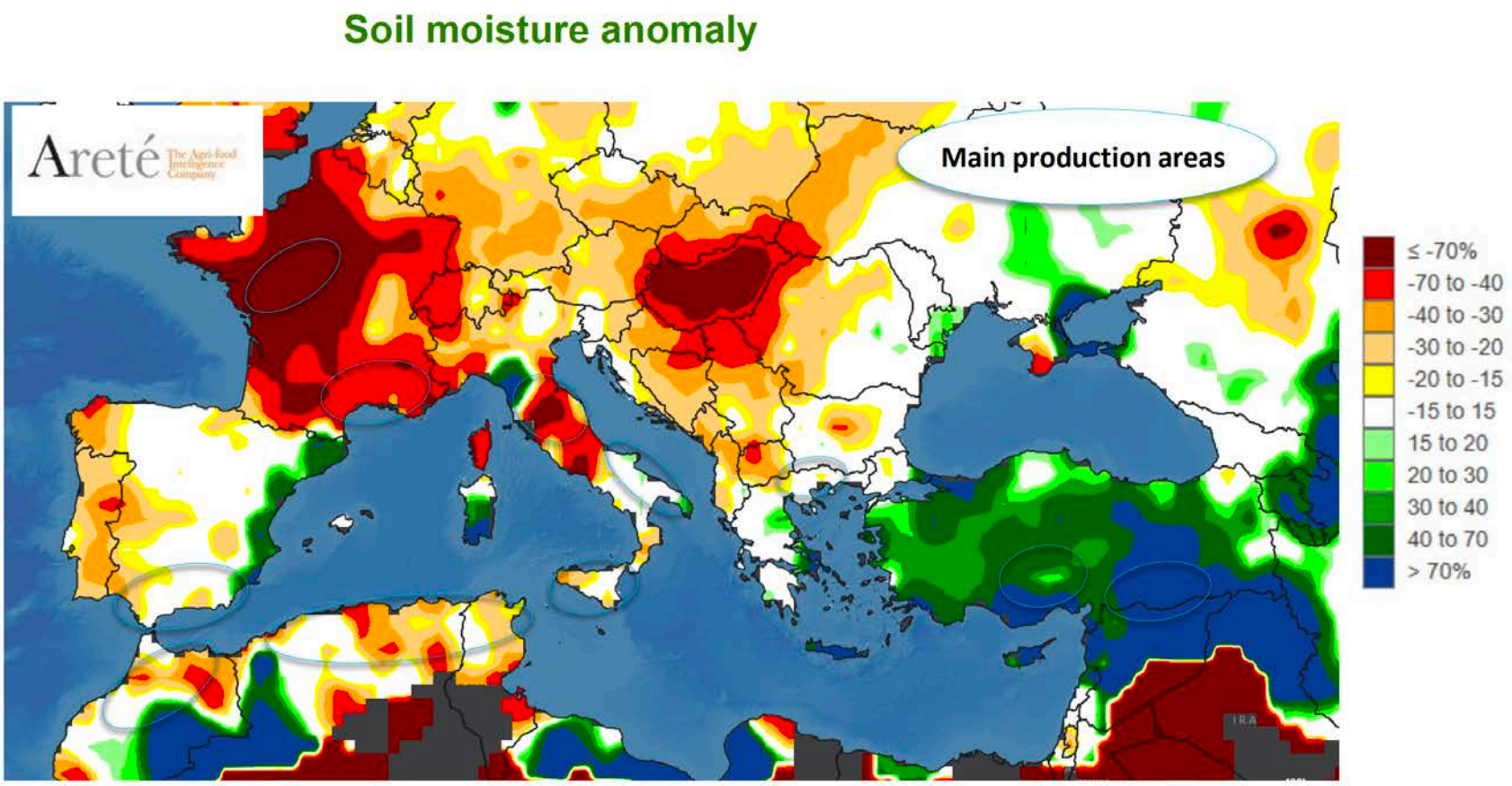
Chart 8 CONDITIONS FOR 2027 SOWING IN THE MEDITERRANEAN REGION



Soil moisture anomalies and main durum wheat-producing areas. Source: GADAS.

An economic factor adds to these weather-related difficulties.

Current price differentials between durum wheat and other crops could reduce farmers' incentives to allocate land to durum wheat production.

Given more favourable profitability prospects for other cereals or pulses, we cannot rule out further reductions in planted area.

The situation appears relatively more favourable in Turkey, where soil moisture conditions are supporting the sowing outlook.

In North Africa, rainfall close to average levels is forecast during the main sowing period, but the risk of a drier-than-normal winter remains.

Weather developments will therefore be crucial in assessing production prospects for the 2027/28 marketing year.

In Canada, where sowings will take place in spring 2027, farmers' decisions will also be influenced by price trends for different crops over the coming months.

According to forecasts from Agriculture and Agri-Food Canada, the durum wheat premium over common wheat is expected to remain negative on average in the 2026/27 marketing year.

Furthermore, durum wheat prices are expected to increase less than pulse

prices, limiting incentives to expand planted area.
Price expectations and the relative profitability of different crops therefore represent key factors to monitor.
It is important to consider that these factors may generate a feedback mechanism: relatively low durum wheat prices may discourage sowings, while expectations of future reductions in planted area and production may help support prices.

The outlook: abundant supplies and volatility risks

Our analyses point to a global durum wheat market characterised by overall abundant supplies in the 2026/27 marketing year.
Production exceeds consumption for the third consecutive year, and global stocks are estimated at their highest levels in more than fifteen years.
These fundamentals are an important factor in keeping prices in check and may help mitigate volatility.
However, we have identified several factors that could support prices in the coming months.
The first concerns the quality of the available wheat.

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Indications from North America and the Mediterranean region point to lower protein levels than in the previous marketing year, with relatively limited availability of higher grades.
This situation could lead to wider price differentials between the various grades of durum wheat, particularly supporting prices for high-protein wheat.
The second factor concerns the sowing outlook.
Current price levels and price differentials relative to alternative crops could discourage durum wheat production, particularly in regions where competition with other cereals and pulses is more significant.
A reduction in planted area could translate into lower production in the following marketing year, helping to support prices.
A third factor is represented by tensions in other cereal markets.
Production difficulties affecting maize and common wheat, together with logistical constraints and geopolitical tensions, could continue to exert an indirect influence on the durum wheat market.
Finally, developments in the macroeconomic environment will need to be monitored, particularly with regard to exchange rates, energy costs and ocean freight.

In conclusion, we believe that abundant global supplies will continue to play an important role in maintaining the balance of the durum wheat market.
At the same time, the distribution of supplies across different quality grades and production prospects for the next marketing year could play an increasingly important role in price formation.
For operators throughout the supply chain, it will therefore be important to monitor not only developments in global supply and demand balances, but also crop quality characteristics, planting decisions in the main producing regions and trends in related cereal markets.
The emerging picture is that of a well-supplied market in quantitative terms, but one that remains exposed to factors capable of generating volatility and significant price differences between the various grades of durum wheat.

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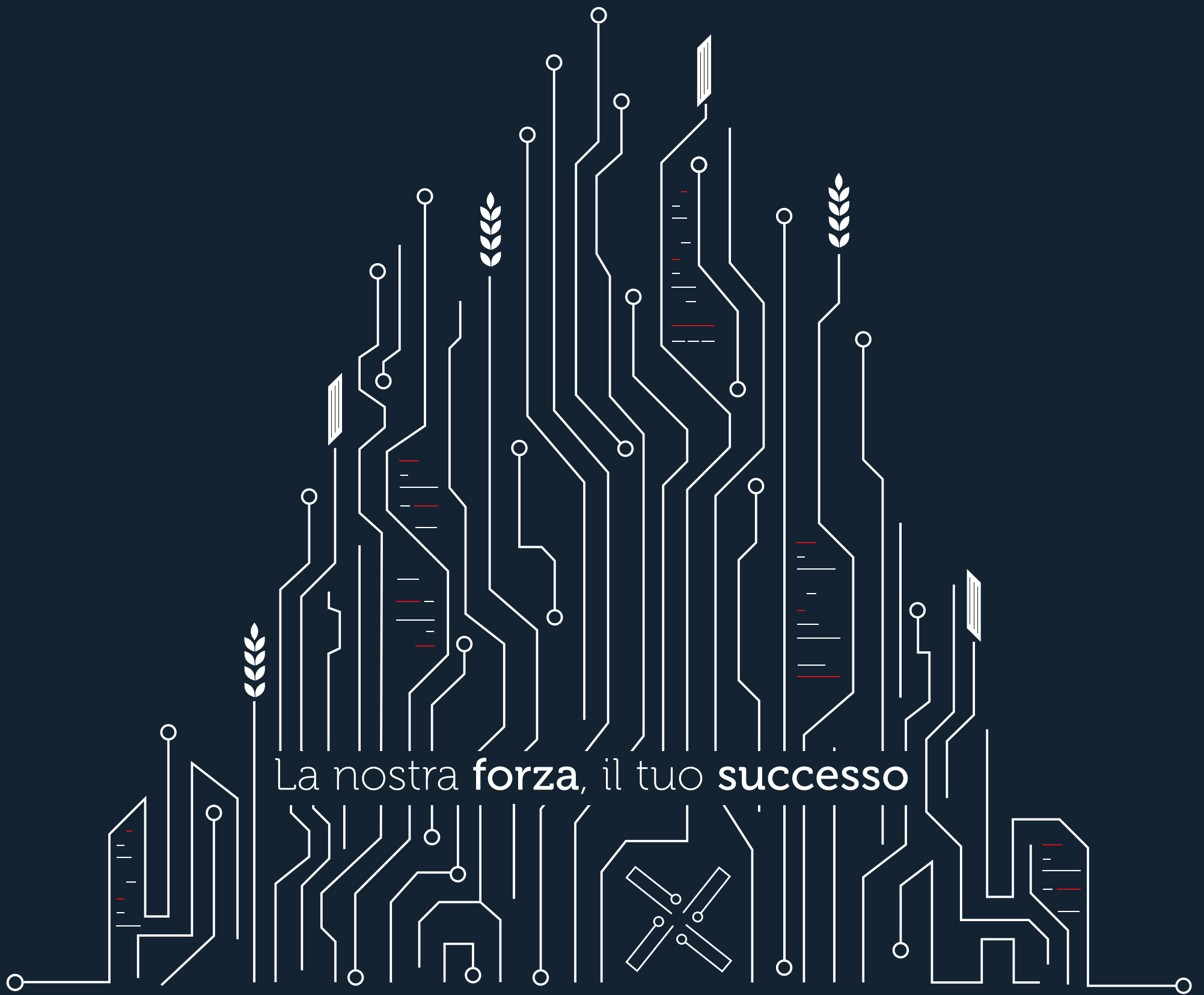

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2

High-pressure hydrostatic (HPP) treatment of fresh pasta

Fabio Licciardello
University of Modena and Reggio Emilia



High-Pressure Processing (HPP) is a mild processing technology that involves subjecting food products to high hydrostatic pressures (300–600 MPa) for a few minutes. The treatment takes place after packaging, reducing the risk of recontamination and guaranteeing greater food safety. When applied to fresh pasta, HPP would make it possible to extend shelf life by inactivating spoilage microorganisms, without the need for heat treatment. This article outlines the key aspects of the technology, its benefits and its prospects in relation to its industrial application in the production of fresh pasta.

High-Pressure Processing (HPP), also known as High Hydrostatic Pressure (HHP) processing or ‘pascalisation’, is one of the most promising cold stabilisation methods in the contemporary food industry. This mild technology involves subjecting the products – already in their final packaging – to high hydrostatic pressures, generally ranging from 300 to 600 megapascals (MPa) (corresponding to 3,000–6,000 bar), for a period ranging from a few seconds to a few minutes. The development of this technology over recent decades has been driven by growing consumer demand for fresh-like products, i.e. products with sensory and nutritional characteristics similar to those of fresh produce, minimally processed and free from additives and preservatives (clean-label). HPP is capable of inactivating spoilage and pathogenic microorganisms without the use of heat, thereby preserving the product’s vitamins, colour and original sensory characteristics.
The effectiveness of HPP treatment is based on two fundamental principles of physics: Pascal’s isostatic principle and Le Chatelier’s principle. According to Pascal’s principle, pressure applied to a confined fluid is transmitted instantaneously and uniformly to every point of the container, irrespective of its shape or size (Figure 1). This ensures uniform stabilisation of the product, unlike heat, which is transferred according to a thermal gradient, potentially leading to uneven heating.
The HPP process is a batch process (Figure 2) and involves: the loading of the packaged products into the pressure chamber; pressurisation (come-up), a phase during which the chamber is filled with water (usually chilled) and pressurised using pressure intensifiers; maintenance of the target pressure for a preset time (a few minutes); lastly, the release of pressure and the unloading of the product. Despite the high initial investment costs associated with HPP equipment, small-scale producers can also access the technology by outsourcing their processing to third-party service providers.
Fresh pasta is an inherently perishable foodstuff due to its high moisture content (at least 24% by law) and water activity (aw) of

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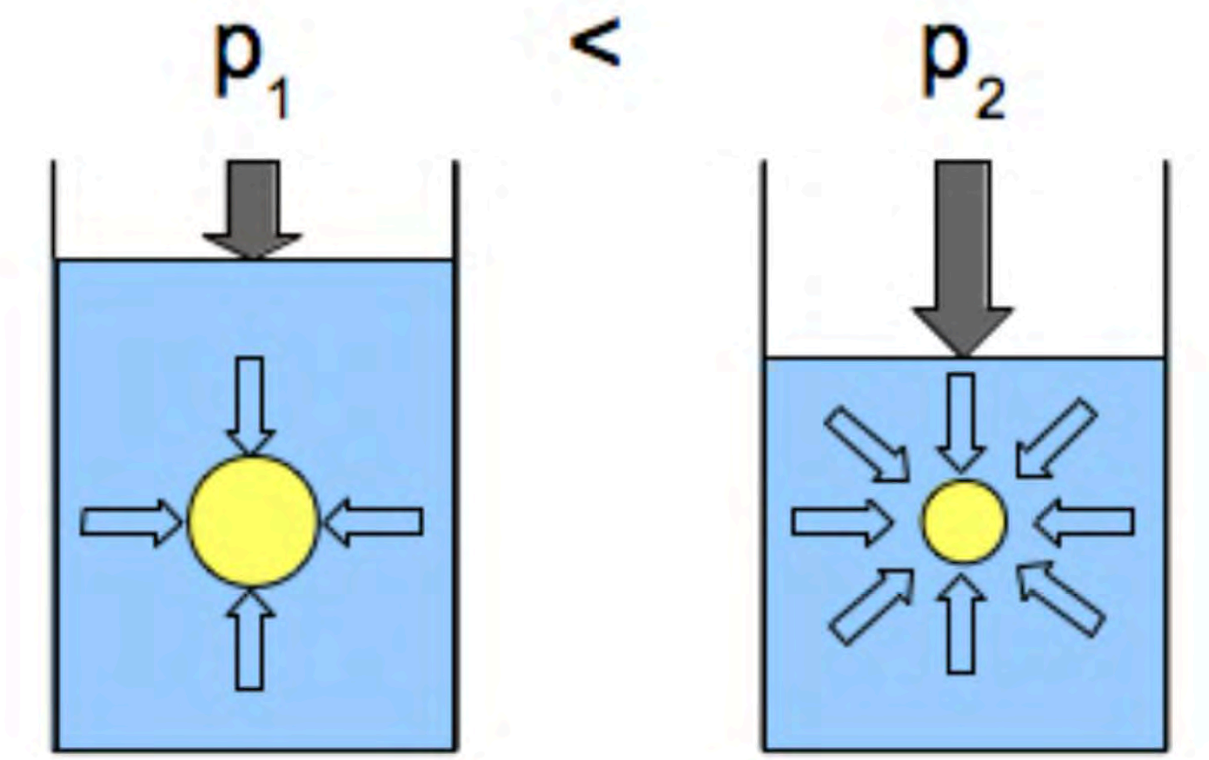
Figure 1 UNIFORM DISTRIBUTION OF PRESSURE IN A CONFINED FLUID, IN ACCORDANCE WITH PASCAL'S PRINCIPLE



between 0.92 and 0.97. These conditions, combined with a nutrient-rich composition, encourage the proliferation of various microorganisms. The main problem is caused by Staphylococcus aureus, the toxins of which are heat-stable and cannot be eliminated once produced (Zardetto and Basaglia, 2018). Other significant threats include Bacillus spores – which are often carried by dairy-based fillings – and moulds, the main cause of visual spoilage.

Traditionally, stabilisation is achieved using hurdle technology (Leistner and Gorris, 1995), combining thermal pasteurisation, modified atmosphere packaging (MAP) and refrigeration, thereby ensuring a shelf life of approximately 40–60 days. However, heat treatment can cause nutritional and sensory damage, as well as having a significant environmental impact.

The application of HPP to fresh pasta opens up significant industrial prospects. By processing the product after packaging, the risk of post-process recontamination is completely eliminated, ensuring a higher standard of food safety. However, to preserve the integrity of the fresh pasta, particularly if it is filled, single-layer packaging is preferable. As with all products that have undergone HPP treatment, refrigerated storage is required, as HPP alone is not

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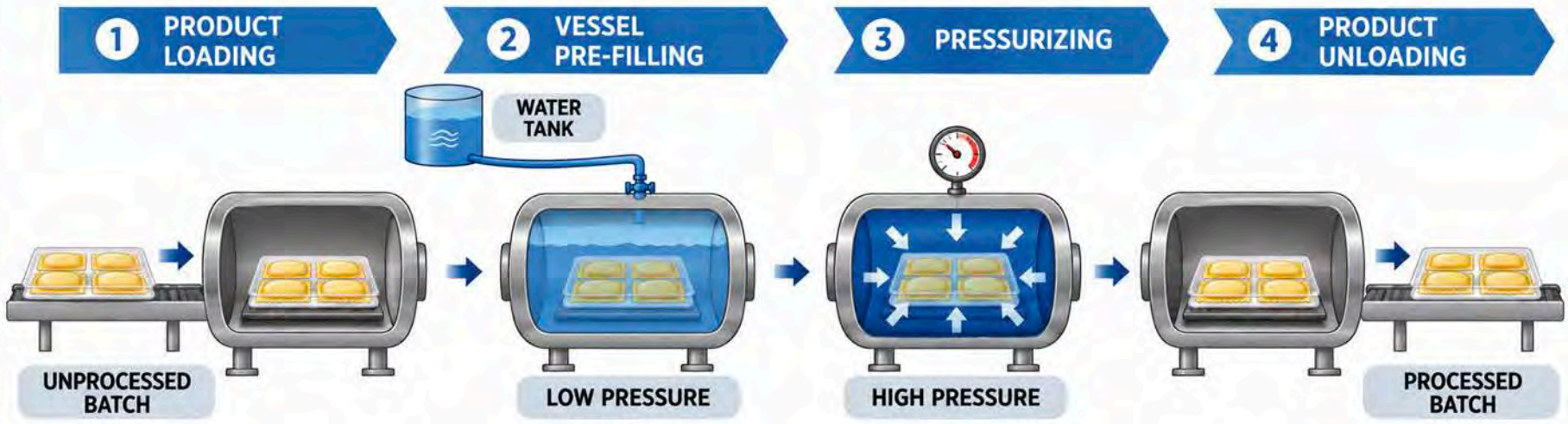
Figure 2 **PHASES OF AN INDUSTRIAL HPP TREATMENT PROCESS.**



capable of destroying bacterial spores. There is a lack of scientific literature on the effects of high pressure on the structure of fresh pasta, particularly with regard to its effects on egg pasta, given the change in the state of the proteins that such treatment can induce. HPP is already used in some applications in the ready-meal sector, enabling food safety to be reconciled with the maintenance of high-quality artisanal standards, while its use in fresh pasta, as an alternative to thermal pasteurisation, requires further scientific investigation. The technology has, however, the potential to offer a competitive advantage in the creation of clean-label and premium products.

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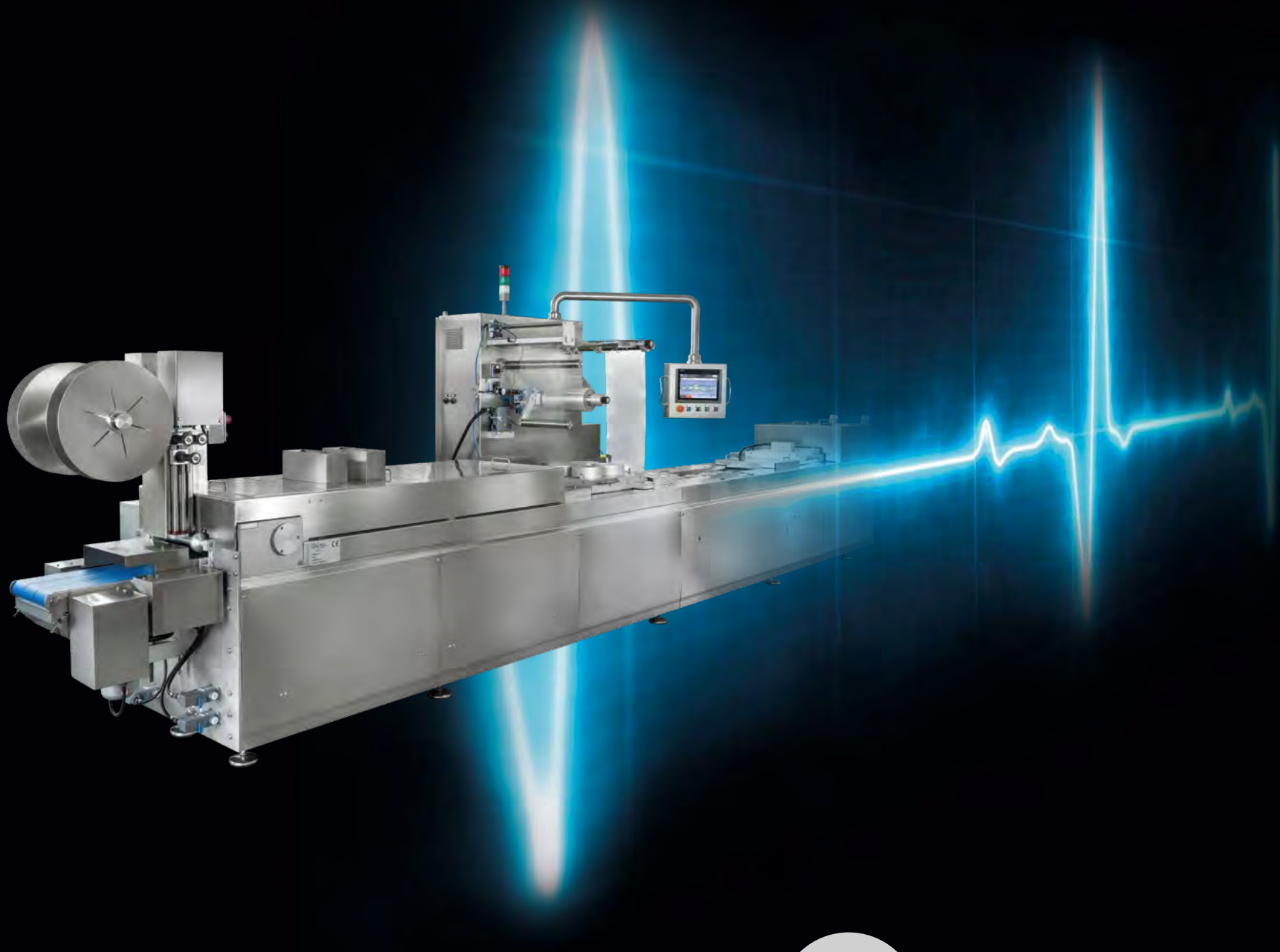

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Pasta: the changing global market sees growth in fresh and premium products across international markets

Matteo Bonù
NielsenIQ



At World Pasta Day 2026 in Parma, Matteo Bonù of NielsenIQ presented an analysis of global consumer trends and the outlook for the pasta category. While dry pasta volumes remain broadly stable, fresh pasta is growing by 2.7% and demand for premium products is strengthening. The United States, the United Kingdom and Canada offer significant growth potential in a market increasingly influenced by convenience, health and changing purchasing habits.

The global pasta market is undergoing a transformation, with broadly stable dry pasta consumption accompanied by growth in fresh pasta, the strengthening of premium segments and the emergence of new opportunities in international markets. Changes are affecting not only the size and geographical distribution of demand, but also the criteria consumers use when choosing food products, with increasing importance being attached to affordability, quality, health and ease of preparation.
This is the picture outlined by Matteo Bonù, Food Industry Leader at NielsenIQ, during World Pasta Day 2026, held in Parma on 27 and 28 October, for which Pastaria was the Main Media Partner. The presentation, entitled Global trends and opportunities for Pasta category, combined pasta category sales data with an analysis of the main trends reshaping purchasing behaviour worldwide.
The data presented by NielsenIQ, covering 64 monitored markets and referring primarily to the moving annual total ending August 2026, portray an overall resilient sector, albeit characterised by widely differing dynamics across product categories and geographical regions. Sales data refer to the food retail channels monitored by NielsenIQ, including hypermarkets, supermarkets, self-service stores and discount stores, or equivalent channels in the various countries. They therefore exclude out-of-home consumption and do not represent the total turnover of the pasta market.

Dry pasta: €15.1 billion in sales, with stable volumes

Il mercato della pasta secca nel canale retail dei 64 mercati monitorati da
The dry pasta retail market across the 64 markets monitored by NielsenIQ reaches a total value of €15.1 billion, corresponding to 7.31 million tonnes sold.
Compared with the previous year, sales value recorded modest growth of 0.4%, while volumes remained broadly unchanged. Overall, the market therefore shows considerable stability in volume terms, despite significant differences between regions.



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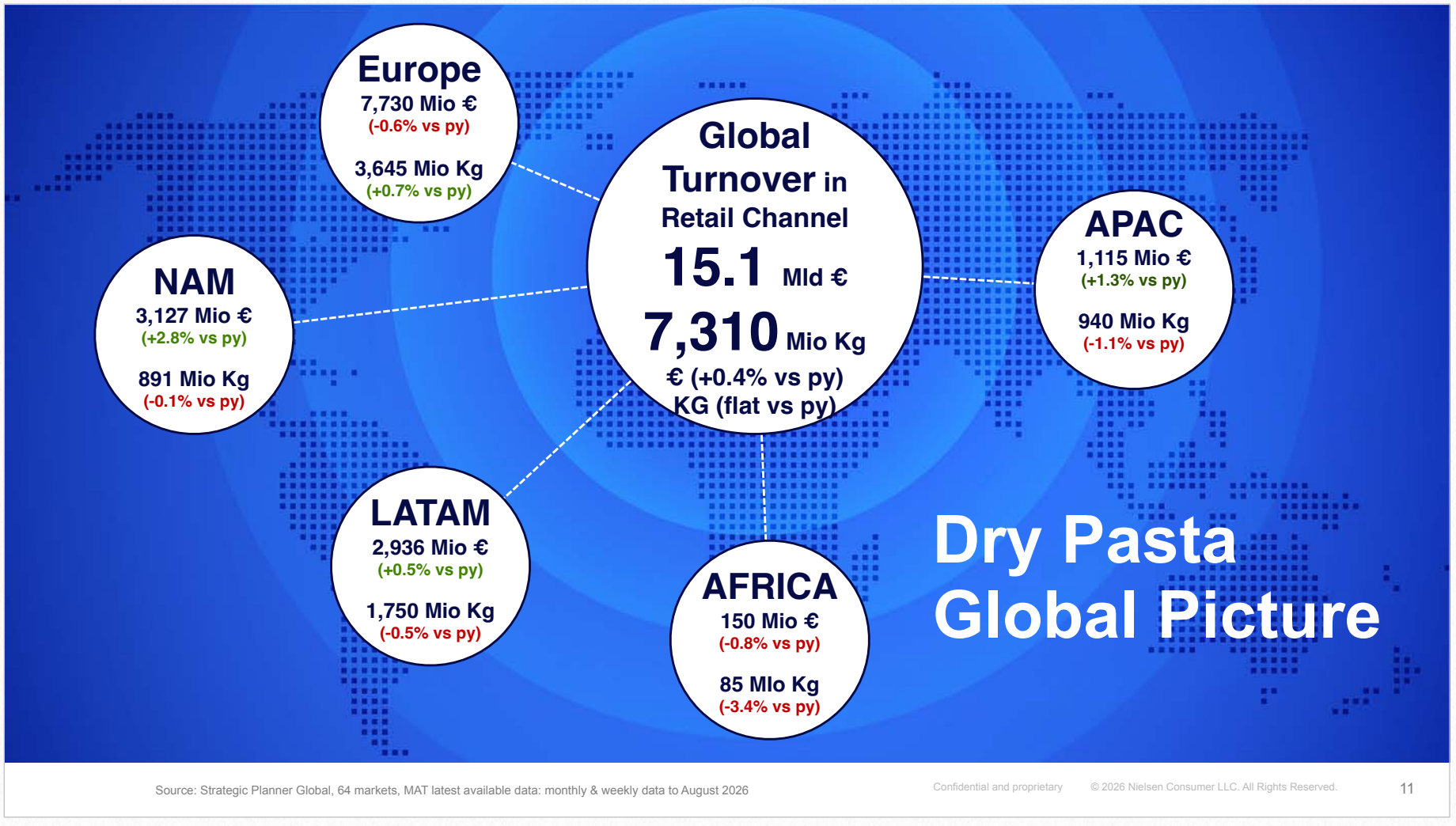

Source: Strategic Planner Global, 64 markets, MAT latest available data: monthly & weekly data to August 2026

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Europe represents the largest dry pasta market, with sales of €7.73 billion and 3.645 million tonnes. Sales value declined by 0.6%, while volumes increased by 0.7%. The combination of these two indicators highlights a situation in which higher purchase volumes do not translate into corresponding growth in sales value.
In North America, by contrast, sales reached €3.127 billion, representing an increase of 2.8% in value, while volumes remained broadly stable (-0.1%) at 891,000 tonnes.
Latin America represents another major consumer market, with sales of €2.936 billion and 1.75 million tonnes. Sales value increased by 0.5%, while volumes declined by 0.5%.
In the Asia-Pacific region, sales amounted to €1.115 billion (+1.3%), with volumes of 940,000 tonnes (-1.1%). Finally, Africa represents a smaller market, with sales of €150 million and 85,000 tonnes, recording declines of 0.8% and 3.4%, respectively.
These differences confirm that the evolution of the global market cannot be interpreted in terms of a single trend. While volumes are proving more resilient in some regions, growth in sales value in others is accompanied by stable or declining purchase volumes.

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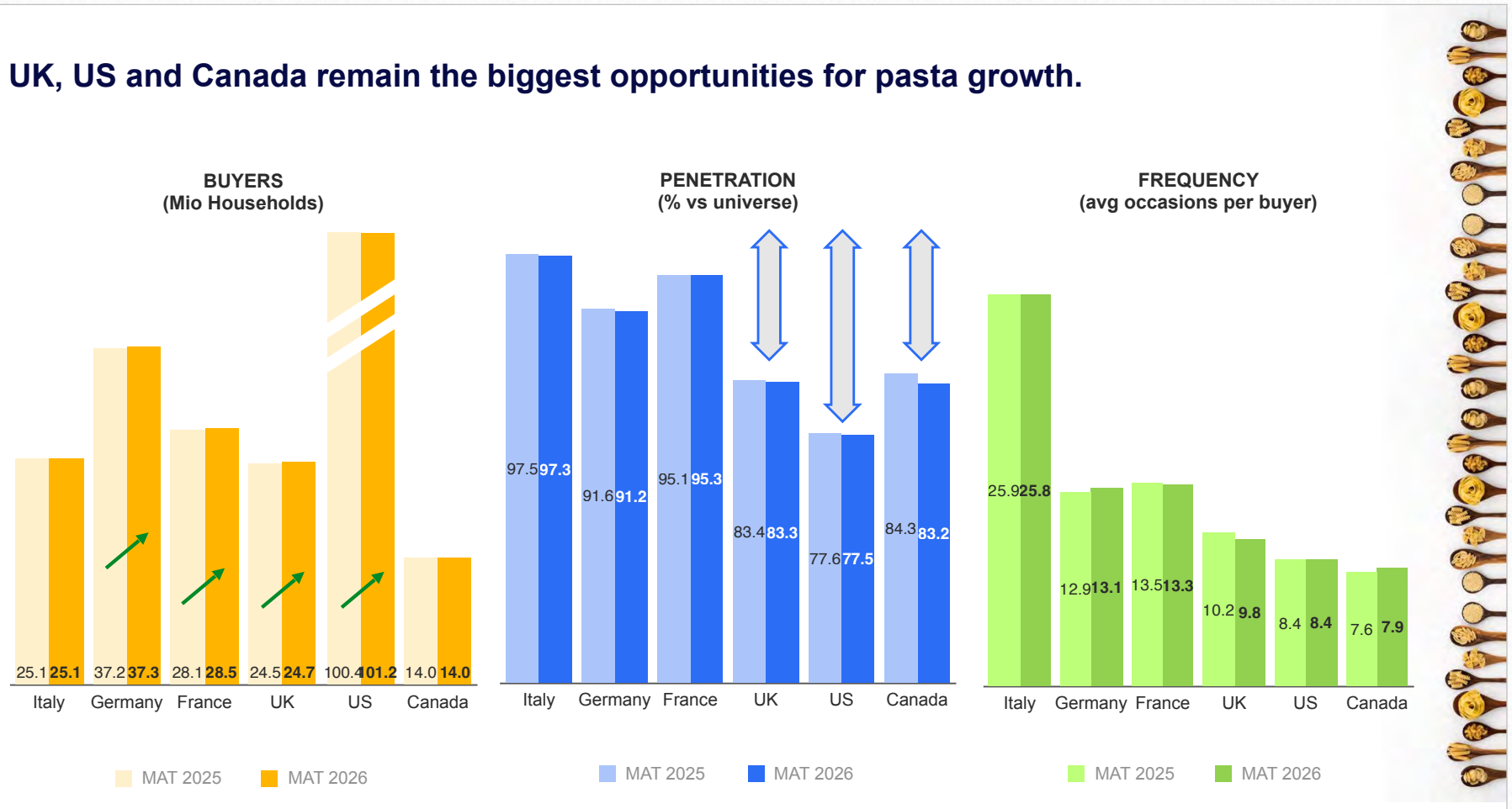

Source: NIQ Strategic Planner| POD dataset | MAT August 2026

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United States, United Kingdom and Canada: where growth opportunities are concentrated

A particularly interesting aspect of NielsenIQ's analysis concerns the differences between mature pasta markets and those where significant growth potential remains.

A comparison of the major European and North American countries shows that Italy, Germany and France have very high levels of category penetration. In Italy, 97.3% of households purchase pasta, while the figure reaches 95.3% in France and 91.2% in Germany.

The situation differs in the United Kingdom, the United States and Canada, where penetration stands at 83.3%, 77.5% and 83.2%, respectively.

Purchase frequency also varies considerably. Italy records an average of 25.8 purchase occasions per buying household per year, compared with 13.1 in Germany, 13.3 in France, 9.8 in the United Kingdom, 8.4 in the United States and 7.9 in Canada.

The comparison highlights growth opportunities in the North American and UK markets, arising from both an expansion of the consumer base and an increase in purchase frequency.

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The size of the US market makes these opportunities particularly significant. According to NielsenIQ, approximately 101.2 million households in the United States purchase pasta, up from 100.4 million in the previous year.

Growth in the US market is also confirmed by the analysis of sales trends. Over the period under review, the United States contributed approximately €73 million to the increase in global dry pasta sales value, followed by Canada with around €10 million and the United Kingdom with approximately €9 million.

Several major European markets made a negative contribution. Italy recorded a decline in sales value of approximately €69 million, Germany €27 million and France €12 million.

The factors behind these trends differ. In the United States, growth is driven primarily by pricing and distribution. In the United Kingdom and Canada, by contrast, household purchasing behaviour, in terms of purchase occasions and spending, plays a particularly important role.

For pasta manufacturers, this picture suggests the need for differentiated commercial strategies: in markets where penetration is already very high, growth depends primarily on the ability to create value and innovate; in countries where the category is less widespread, there is scope to expand consumption further.

Consumer polarisation favours premium products

One of the most significant phenomena identified by NielsenIQ is the increasing polarisation of demand between affordable and premium products, at the expense of the middle price tiers.

This trend affects the fast-moving consumer goods (FMCG) market internationally. According to NielsenIQ data covering 26 markets, in the 52 weeks ending 14 June 2026, mainstream products lost one percentage point of value share compared with the previous year, while the discount and premium segments gained 0.3 and 0.6 percentage points, respectively.

The loss of share in the mainstream tier is equivalent to approximately US$23 billion in sales across the markets analysed.

This phenomenon is also reflected in the pasta market, where NielsenIQ highlights an increase in the share of premium products across all six countries examined.

In Canada, the premium segment increased from 27% to 30% over the three annual periods considered. In the United States, it grew from 14% to 16%, in the

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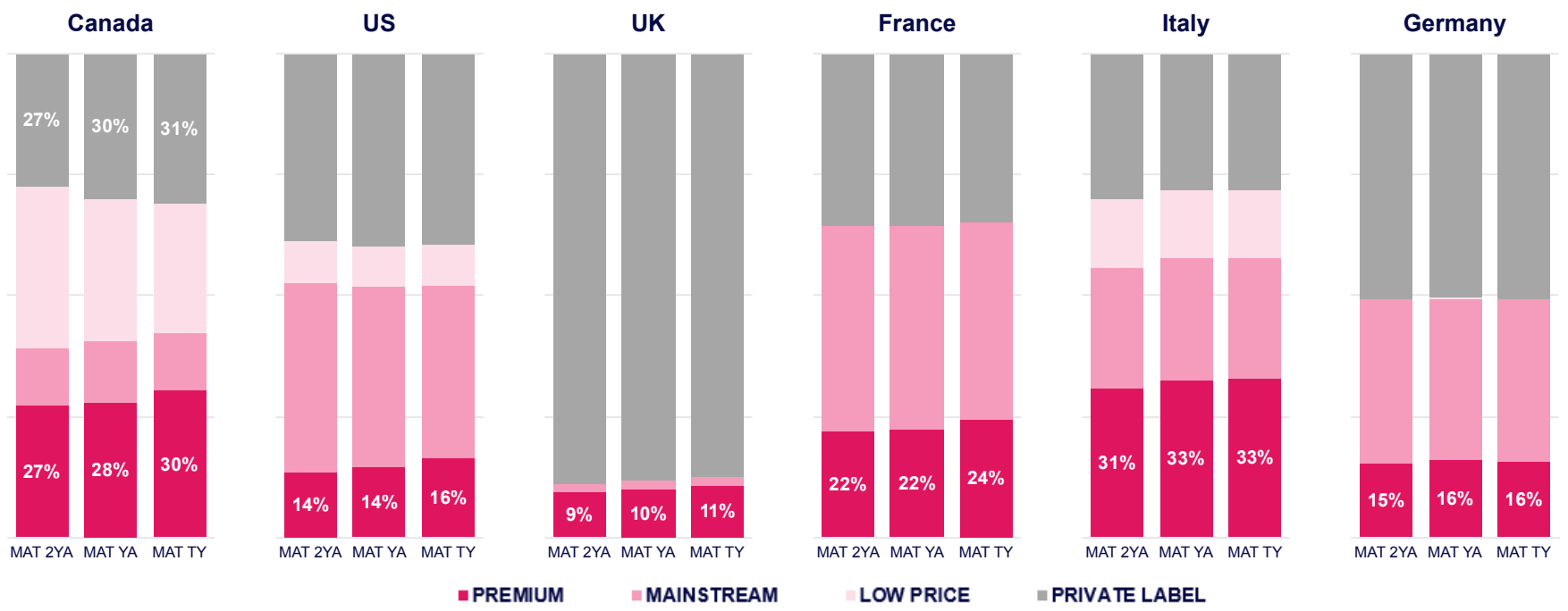
Premium grows across all markets, while Private Label remains broadly stable except in Canada.



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United Kingdom from 9% to 11%, in France from 22% to 24%, in Italy from 31% to 33%, and in Germany from 15% to 16%.

The Italian figure is particularly interesting, with the premium segment now accounting for one third of the market under consideration, confirming the importance of higher-value-added products.

Overall, private label shares remained relatively stable, with the exception of Canada, where a significant increase was recorded, from 27% to 31%.

The evolution of demand therefore points to two possible competitive strategies for manufacturers: on the one hand, meeting the affordability needs of more price-conscious consumers; on the other, developing differentiated offerings capable of justifying premium positioning through quality, authenticity, product characteristics and the consumption experience.

For manufacturers operating in the middle price tiers, the main challenge is to make the value of their offering recognisable and compelling.

Fresh pasta: an €8.8 billion market that continues to grow

While dry pasta shows an overall stable trend, fresh pasta is experiencing

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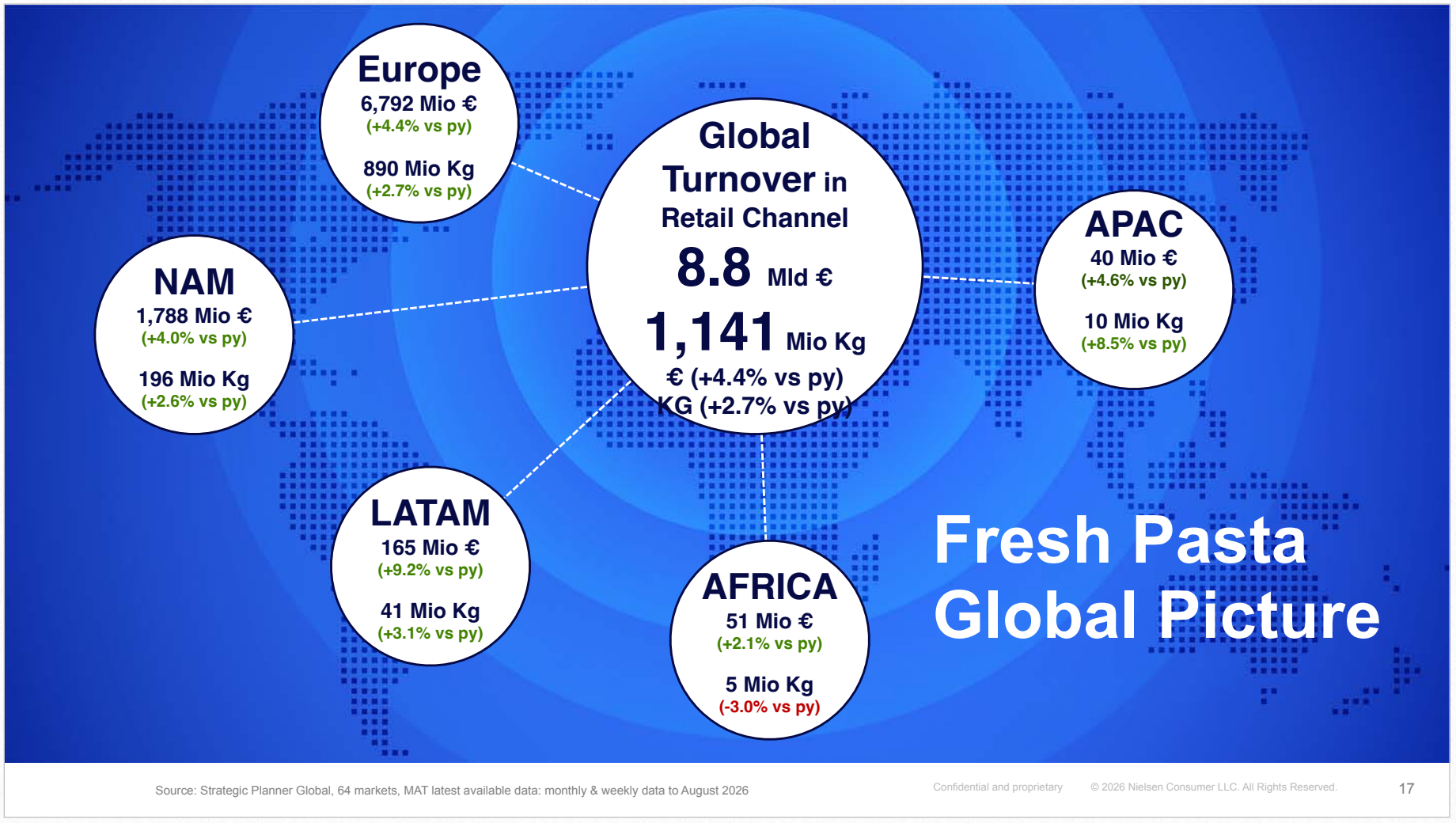

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considerably more favourable market dynamics.

Across the 64 markets monitored by NielsenIQ, retail sales value reached €8.8 billion, representing growth of 4.4% compared with the previous year. Volumes amounted to 1.141 million tonnes, an increase of 2.7%.

This is a particularly significant result, as growth is occurring simultaneously in both sales value and volumes.

Once again, Europe represents the largest market, with sales of €6.792 billion, up 4.4%, and volumes of 890,000 tonnes (+2.7%).

North America recorded sales of €1.788 billion, an increase of 4%, while volumes grew by 2.6%, reaching 196,000 tonnes.

Despite starting from a smaller base, Latin America is experiencing particularly strong expansion: sales value increased by 9.2%, reaching €165 million, while volumes grew by 3.1% to 41,000 tonnes.

In the Asia-Pacific region, sales reached €40 million, representing growth of 4.6%, while volumes increased by 8.5% to 10,000 tonnes.

Finally, the African market was worth €51 million (+2.1%), with volumes of 5,000 tonnes, down 3%.

The comparison with dry pasta therefore highlights the greater dynamism of the

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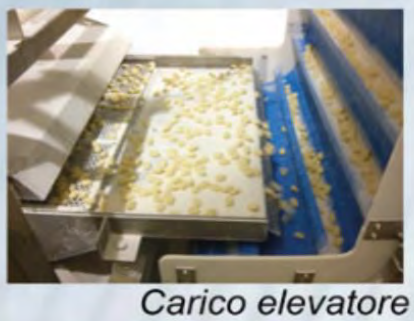

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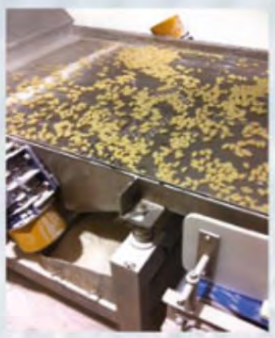

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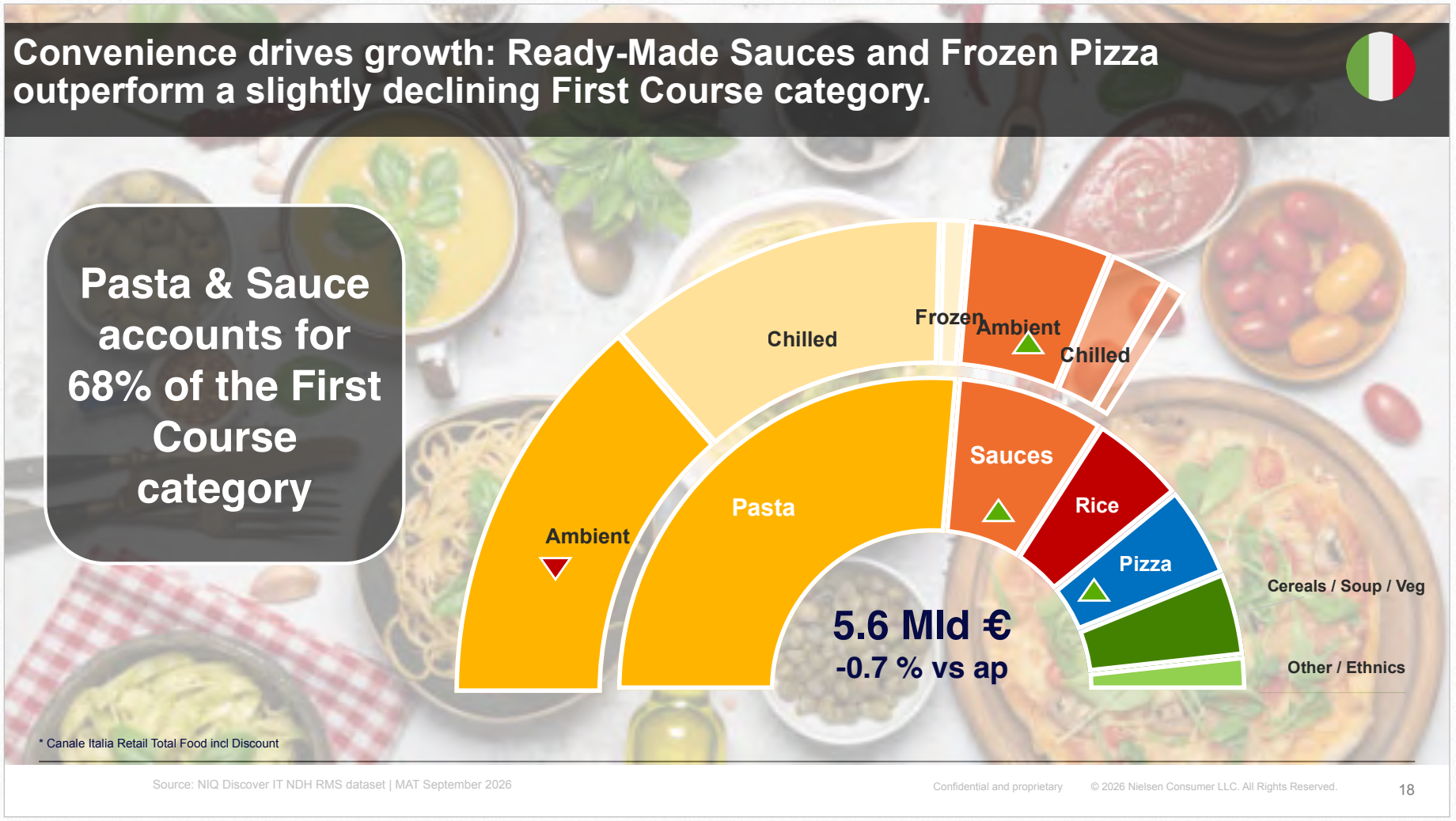

fresh pasta category, which is recording sales growth in almost all the geographical regions considered.

This trend forms part of a broader shift in eating habits, characterised by increasing attention to convenience, perceived quality and the search for solutions that simplify meal preparation.

The data do not allow fresh pasta growth to be attributed directly to any specific factor, but they indicate development potential that deserves particular attention from companies operating in the sector.

Italy: convenience plays an increasingly important role in the first-course category

The importance of convenience is also highlighted by the analysis of the Italian first-course market.

According to NielsenIQ data covering the food retail channel, including discount stores, in the moving annual total ending September 2026, the first-course market was worth a total of €5.6 billion, down 0.7% compared with the previous year.

Within this category, pasta and sauces together account for 68% of sales value. Pasta represents 53% of the market, while sauces account for 15%. These are

followed by rice and pizza, each with a 10% share, cereals, soups and vegetables with 9%, and other preparations, including ethnic foods, with 3%.

The composition of the category highlights the importance of different storage and preparation methods.

Within the pasta segment, ambient products account for 27% of the overall first-course market, chilled products for 23% and frozen products for 2%, according to the rounded shares reported in the presentation.

NielsenIQ's analysis also indicates that ready-made sauces and frozen pizza are outperforming the overall first-course market, which is experiencing a slight decline.

This is an important indication for the pasta sector, as it confirms the growing role of solutions that reduce the time and effort required to prepare meals.

Competition therefore extends beyond different pasta shapes or types to increasingly encompass alternatives that meet the same consumer need: serving a first course quickly and easily.

Price, health and quality: the changing concept of value

NielsenIQ's presentation also devoted considerable attention to the evolution of consumer behaviour, identifying several trends likely to influence the food market in the coming years.

One of the most significant changes concerns the very concept of value. According to the global *NIQ 2026 Consumer Outlook* survey, price remains the leading factor identified as most important when choosing products, cited by 15.3% of consumers. However, the health and natural attributes of food products follow closely behind, at 15.1%. Safety and hygiene account for 13.6% of responses, while trust in a familiar brand reaches 12.2% and superior quality 11%. These are followed by environmental sustainability (7.2%) and local origin (6.5%).

The most interesting finding is the virtually equal importance of price and health-related attributes in consumers' stated hierarchy of priorities.

Attention to spending does not therefore necessarily mean compromising on quality or wellbeing. On the contrary, purchasing decisions tend to combine financial considerations with expectations regarding product characteristics.

A further insight emerges from the analysis of the reasons why consumers are willing to pay more.

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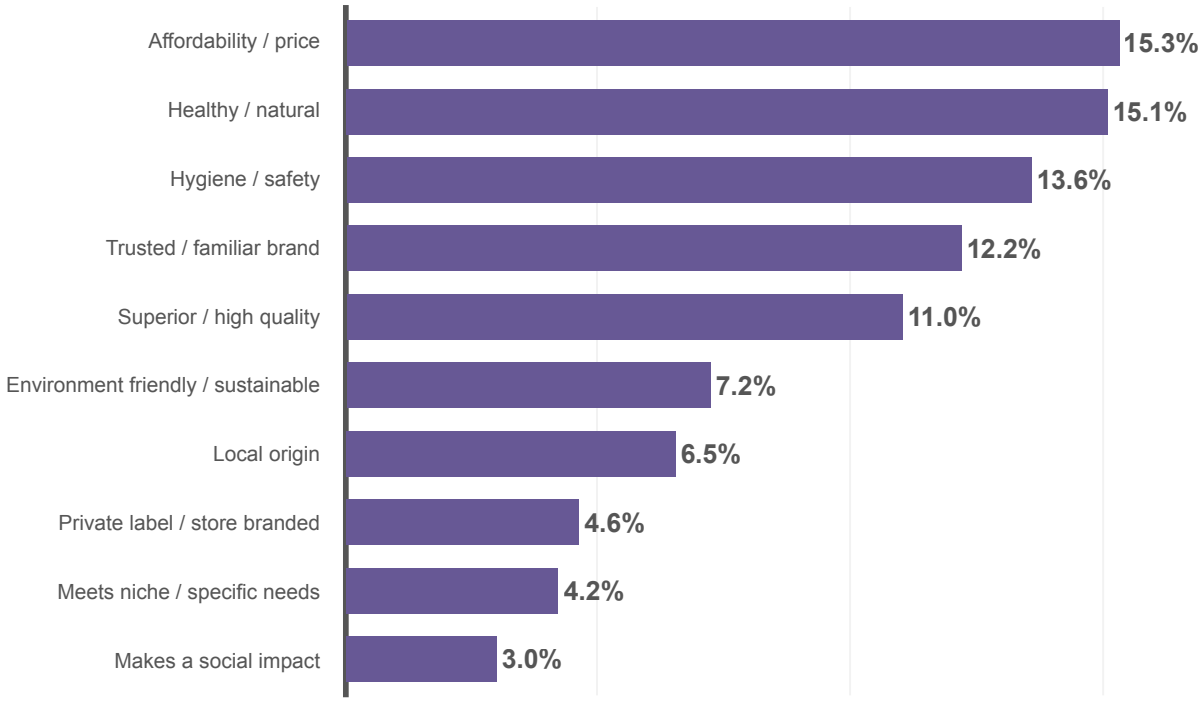
Health is no longer a “trade off”; wellbeing won’t be compromised in the year ahead

Ranking factors of ‘most importance’ when choosing what to buy

Global consumer sentiment, % respondents who said each factor was “most important”



The Rise of a Health-First value equation: *according to consumers, “Health” joins “Price” at the top of the consumer decision tree*



Source: NIQ 2026 Consumer Outlook, Global

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spent, while 32% value products that save time or simplify everyday life. Finally, 26% consider a better or more enjoyable consumption experience important.

This last factor shows significant generational differences: it is cited by 28.7% of Generation Z and 29% of Millennials, compared with 19.4% of Baby Boomers.

For the pasta industry, these trends suggest opportunities for innovation that extend beyond nutritional characteristics to encompass convenience, sensory quality, pasta shapes and ways of consuming the product.

New technologies influence purchasing decisions

Another change concerns the way consumers search for information and decide what to buy. NielsenIQ’s survey on FMCG purchases shows that traditional sources of influence continue to play an important role, but are increasingly complemented by digital tools and artificial intelligence-based systems.

Some 79% of consumers report being influenced, at least occasionally, by their usual preferences after researching products. Recommendations from family and friends influence 76% of respondents.

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Search engines and retailer recommendations both reach 65%, while recommendations generated by artificial intelligence reach 55%.
Content and recommendations from influencers stand at 52%.
These percentages refer to consumers who report being influenced by these sources with varying frequency, rather than shares of purchases directly attributable to individual channels.
Nevertheless, the survey highlights the significant role artificial intelligence is beginning to play in product discovery and evaluation.
A related phenomenon is the growing adoption of applications that allow consumers to assess ingredients by scanning product packaging.
In a study conducted by NielsenIQ BASES in the United States, the proportion of respondents reporting that they use these applications increased from 17% in May 2025 to 25% in January 2026.
Growing attention to ingredient information and assessments generated by digital tools introduces new variables into food product communication.
For pasta manufacturers, this makes it increasingly important to provide clear, accurate and easily accessible

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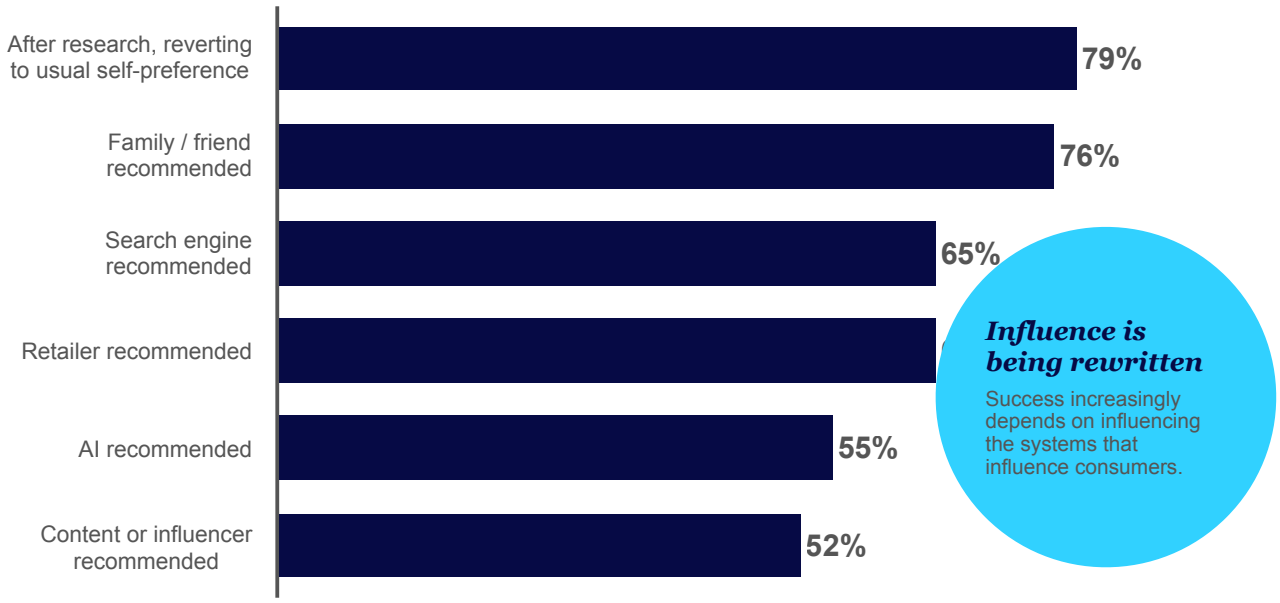
Sources of influence for CPG product discovery

% respondents, Sometimes / Often / Always influenced to purchase by



Source: NIQ 2026 Consumer Outlook, Global, Q. How often do these sources influence your household and grocery purchases?

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information about their products’ characteristics, both on packaging and through digital channels.

The outlook: innovating while maintaining a connection with everyday consumption

The picture outlined by NielsenIQ confirms the central role of pasta in the everyday diets of millions of households, while also highlighting the need to understand an increasingly complex market.

The broadly stable volumes of dry pasta worldwide do not preclude significant growth opportunities, particularly in markets where penetration and purchase frequency remain lower than in countries with a more established pasta tradition.

At the same time, growth in fresh pasta and the strengthening of the premium segment demonstrate that there is scope to develop category value through differentiated offerings.

Consumer polarisation requires companies to define their positioning more precisely, rather than treating the market as a homogeneous whole.

For manufacturers targeting more affordable segments, meeting consumers’ affordability needs will be crucial. For those operating in higher price tiers, the challenge will be to highlight quality,

Pasta remains a global staple with significant growth potential beyond its most mature markets.

Pasta remains at the heart of everyday eating

Despite a rapidly changing consumer landscape, **pasta continues to play a central role in households worldwide**. Penetration keeps growing across major markets, with significant headroom still available in countries such as the US, UK and Canada.

The end of the mainstream creates opportunities at both ends of the market

As consumers move away from the mainstream, **growth is increasingly concentrated in value and premium segments**. For pasta brands, this means a dual opportunity: offering affordable reassurance to financially conscious shoppers while continuing to premiumize through superior quality, authenticity and differentiated propositions.

Convenience and experience will shape the future of the category

Consumers increasingly define value through convenience, quality and overall experience, not price alone. To maintain its relevance, **pasta must continue to innovate around ease of preparation, meal solutions, health and enjoyment**, ensuring it remains closely connected to the needs of both today's and tomorrow's consumers.

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authenticity, innovation and the consumption experience.

In both cases, the ability to adapt product offerings to changing eating habits will play an increasingly important role.

Ease of preparation, attention to health and the growing influence of digital technologies are all factors likely to affect consumer choices and companies’ commercial strategies.

The outlook emerging from NielsenIQ’s analysis is therefore not that of a mature category with no further room for development, but of a market that continues to offer opportunities, provided companies can understand geographical differences, changing demand and evolving consumer expectations.

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4

Pastificio Martelli, a century of artisan pasta making

Editorial team



The Tuscan company celebrates a century of business marked by family continuity and traditional production methods. Anniversary celebrations were held in September with the participation of institutional representatives.

In 2026, Pastificio Martelli, based in Lari, in the province of Pisa, reached the milestone of one hundred years in business. Founded on 1 March 1926 by brothers Guido and Gastone Martelli, who took over the pasta-making workshop where they had worked from a young age, the company is now in its third generation and is one of Italy's historic artisan dried pasta manufacturers.

Over the course of the century, the Martelli family has kept production within the medieval village of Lari, choosing to maintain a small-scale operation and traditional production methods. The pasta is made from durum wheat semolina mixed with cold water, extruded through bronze dies and slowly dried at low temperatures. This production philosophy has enabled the brand, recognisable by its distinctive yellow packaging, to establish itself on international markets, favouring distribution through specialist retailers rather than large-scale retail chains.

The centenary celebrations took place in Lari on 12 September 2026, with an official ceremony at the Castello dei Vicari, attended by Francesco Lollobrigida, Minister of Agriculture, Food Sovereignty and Forestry, who presented the Martelli family with the *Ambasciatori della Qualità Italiana* (Ambassadors of Italian Quality) award.

The occasion also saw the presentation of the book *La famiglia Martelli. Cento anni di buona pasta* (The Martelli Family. One





Dino Martelli receives the *Pastai senza tempo* (Timeless Pasta Makers) award at Fiera Pastaria & Festival 2026


Minister of Agriculture Francesco Lollobrigida presents the Martelli family with the *Ambasciatori della Qualità Italiana* (Ambassadors of Italian Quality) award

Hundred Years of Good Pasta), by historian Michele Quirici, dedicated to the history of the company and its relationship with the local area.
The centenary marks a significant milestone for a company that has navigated the profound transformations of the Italian pasta industry without abandoning its artisan production model.

Dino Martelli receives the *Pastai senza tempo* award

The centenary of Pastificio Martelli was also celebrated at Fiera Pastaria & Festival 2026, held on 30 and 31 March at the Stazione Leopolda in Florence. During the event, Dino Martelli received the *Pastai senza tempo* (Timeless Pasta Makers) award, presented by Pastaria to companies that have helped shape the history of Italian pasta manufacturing, distinguishing themselves through their longevity and business continuity.

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5

The Coop 2026 Report provides an overview of changing consumer habits in Italy

Pastaria Centre for Economic Research



As at-home food consumption rises and out-of-home dining declines, consumption patterns, consumption occasions and purchasing criteria are evolving. Even the shopping trolley is becoming more "hybrid" and less predictable. Out-of-home dining is bearing the brunt of consumer cutbacks, while pre-dinner aperitifs and food delivery are losing their appeal.

Too much pressure. Not only from the high cost of living and the loss of purchasing power, but also due to a profound social and behavioural transformation, which has brought about a radical change in Italians' consumption patterns, including their eating habits.

The picture that emerges from the 2026 Coop Report is that of a country adopting selective spending strategies: comparing options, making sacrifices and focusing its resources on what it considers useful or likely to improve its quality of life.

These macro trends underscore the depth of this transformation, highlighting, in real terms (i.e. adjusted for inflation), that Italian household consumption remains 0.3% below the levels of 2007 – the year preceding the last Great Recession.

Over the past eighteen years under consideration, consumption has increased by 17.3% in Germany, 17.5% in France and 7.2% in Spain. A comparison that clearly illustrates the effects of widespread disparities and growing income polarisation, but which is also the result of choices and behaviours that are profoundly different from those of the past.

In Italy, the composition of typical household spending has changed significantly, with housing and food now accounting for a larger share of expenditure, at the expense of clothing, furnishings, communications and transport.

Analysts explain, however, that interpreting the figures solely in terms of a loss of purchasing power would be an oversimplification. As many as 65% of Italians are in favour of rationalising consumption and minimising waste.

Among those who have cut spending in at least one area over the past three years, 44% cite a decline in disposable income, partly due to the ever-increasing share of unavoidable household expenses. For a further 28%, these spending cuts reflect a conscious choice driven by changing priorities, while the remaining respondents say they have reconsidered the actual need for certain types of consumption.

There are various reasons behind these decisions; the most common (83% of cases) is the conscious decision to avoid purchases deemed unnecessary or impulsive. 63% also say they want to save for future needs, and the same proportion feel they have become much more selective in their decisions, making "fewer but better" purchases.

Repairing, refurbishing, choosing second-hand goods and sharing are becoming key elements of a new culture of "non-consumption".

The effects of these changes have made Italians more frugal when it comes to

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goods but more willing to spend on services. Travel and holidays, health and well-being activities, shows and concerts are gaining ground in consumer spending priorities. Ownership is losing some of its role as a marker of identity, as experiences and the stories they generate take precedence, partly driven by social media. In fact, a “new language of consumption” is emerging, redirecting an increasing share of household expenditure towards other needs and reflecting a cultural shift that places a greater focus on the present and on well-being.

In the midst of this reshuffling and reordering of priorities, reflected also in the rankings, experts observe that food retains its position among the expenditure items to be prioritised. Following its surge during the pandemic, spending for at-home food consumption has still not lost its momentum. Quite the opposite: since 2019, the FMCG (fast-moving consumer goods) sector has recorded cumulative growth of 31.8% by value and 5.6% by volume. By the end of next December, a further 1.9% increase in current prices is expected, along with an additional one percentage point of real growth.

One in five households expects to increase its spending on food for home consumption in the coming months, while only around one in ten expects to reduce it. But it is a difficult task, given the high inflation.

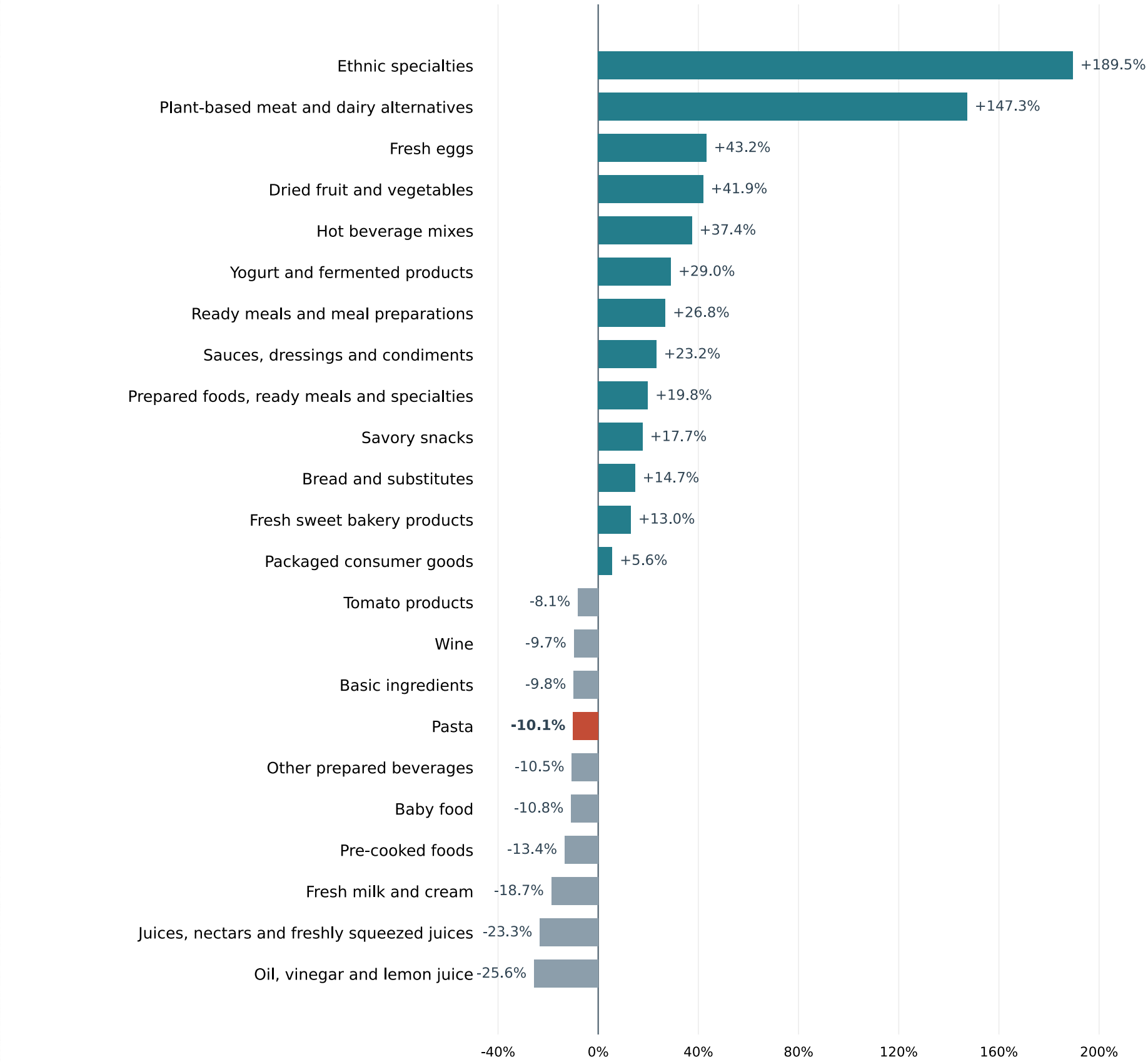
What is changing, however, are the contents of the shopping trolley. Italians have become more adept at striking the right balance between value for money and quality. Private-label products, which are now capable of meeting needs that go well beyond entry level prices, have increased their share of the FMCG market from 28.3% in 2019 to 31.9% in 2026. Discount stores are also gaining ground at the expense of other retail channels, with a market share rising from 21% to 23%.

This confirms that affordability does not necessarily mean choosing the cheapest product; what matters most is the balance between price, quality, service and perceived usefulness.

Against this backdrop, in which various “forces” are at play, the Italian diet is becoming “hybrid”. We are still rooted in tradition, but not constrained by it. Fewer than one in four consumers now rely exclusively on local produce and the Mediterranean diet. But the majority of Italians have begun mixing different styles. They are taking a greater interest in international trends and are responding to new nutritional needs.

The desire to experiment is growing; veganism is attracting a growing following, while eggs are making a comeback,

Chart 1 CHANGING FOOD CONSUMPTION: SALES VOLUMES BY CATEGORY



Change in sales volume (%), 2026 vs 2019 · year ending in June

Source: Rapporto Coop 2026, NielsenIQ

having been re-evaluated as a functional food and a low-cost source of protein.

There's more room in the trolley for kefir, Greek yoghurt, dried fruit, seeds and sugar-free drinks. Preferences are also

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shifting within individual categories, driven by changing dietary habits and the influence of food trends.
The ongoing process of fine-tuning is continuously reshaping Italian consumer choices, making them far less predictable than they used to be.
Another factor to bear in mind is that pragmatism is also eroding the consumer's focus on sustainability Environmental protection is still a sensitive and cross-cutting concern, but income ultimately determines how many good intentions translate into actual spending at the checkout. The evidence is undeniable: personal benefits, particularly those relating to health and safety, take precedence over collective gains
The picture emerging is, therefore, of a consumer who is less loyal to brands, retailers and even long-established habits. A consumer who shops at a wider range of stores and retailers, seeks out promotions, alternates between branded products and private labels, and experiments with new eating habits. A consumer who finds comfort and reassurance at home but is still keen to eat out, albeit less frequently and more selectively, as rising restaurant prices prompt more careful choices about when and where to dine.
Surveys show that 36% of Italians have reduced the frequency of their outings to restaurants over the past twelve months. Even though outings to restaurants decreased by 0.6% in 2026, out-of-home spending increased by 1.5%. This divergence reflects the impact of rising prices.
What is happening is a gradual retreat from out-of-home dining, which is also putting a damper on the aperitif ritual and reducing the appeal of food delivery. Eating out now seems to be less in sync with everyday needs and to be losing, above all, the central role it once enjoyed. Instead, it is becoming increasingly focused on occasions when eating and drinking become opportunities for socialising and new experiences. Socialising, experimentation and the pursuit of new experiences remain the main reasons for choosing to eat out, in a context where simply offering a dining service no longer seems, in itself, to be a compelling enough reason.

Pasta: regaining its central role

Not even pasta is immune to the "silent revolution" that is affecting the contents of Italian consumers' shopping trolleys. The trends affecting some of Italy's most iconic food products help illustrate just how

rapidly habits, priorities and consumption patterns are changing.
In 2026 (the financial year ending in June), the sector – bucking the trend across the FMCG market as a whole – recorded a cumulative decline in volume of 10.1% compared with 2019. This trend is part of a broader transformation in Italian eating habits and reflects a shift in the competitive dynamics between products.
This trend is being driven by a number of factors. As the Coop Report highlights, consumers are experimenting with ethnic products and new sources of protein with greater confidence and spontaneity; they are taking a keen interest in fermented foods and plant-based alternatives to animal protein; and they are paying more attention to weight management and the nutritional composition of food, including its calorie content.
Our relationship with time is also changing. Meal planning is becoming an integral part of household budget management, but at the same time the demand for convenience and quick meal preparation is also increasing. Notably, ready-made pasta dishes are among the FMCG "evergreen" categories mentioned earlier, having consistently recorded volume growth over the past four years, with a 2.4% increase over the latest twelve-month period. When compared with 2019 volumes, "ready meals and food preparations" are also among the fastest-growing categories (+26.8%).
So rather than a crisis in the pasta sector, what seems to be emerging is a fragmentation of consumption patterns. Traditional pasta formats now have to compete for shelf space with fast and convenient alternatives, new ingredients and recipes inspired by different food cultures, from tortillas and noodles to a growing range of ethnic offerings.
Undoubtedly, pasta has its own unique cultural heritage that is difficult to replicate. The most complex aspect of this new scenario, however, is the task of finding a place in a less rigid and more adventurous dietary pattern, one that is also increasingly focused on convenience, health and weight management. Crucially, these trends are challenging the established consumption habits that have been one of the category's key strengths for so long, forcing it to rethink its positioning in response to changing lifestyles and evolving consumer needs.

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6

Premio Pastaria 2027: call for applications now open for the best Master’s and PhD theses

Editorial team



Applications are open until 15 December 2026 for the award promoted by Pastaria to recognise scientific research applied to pasta production. Three prizes are available, worth a total of €1,500, with additional special mentions also possible. The award ceremony will take place in Florence during Fiera Pastaria & Festival 2027.

Applications are now open for the *Premio Pastaria 2027*, an initiative promoted by Kinski Editori, publisher of Pastaria magazine, to recognise the best Master's and PhD theses focusing on research applied to pasta production.

The Award aims to foster dialogue between academia and the pasta industry by highlighting studies and research that can contribute to the advancement of scientific knowledge, technological innovation and improvements in the sector's production processes. The initiative also seeks to encourage young researchers to take an interest in an industry where scientific and technological expertise plays an increasingly important role, from the selection and characterisation of raw materials to the optimisation of processing operations and the quality and safety of finished products.

Two prizes of €400 each are available for the best Master's theses and one prize of €700 for the best PhD thesis, each accompanied by a certificate. The judging committee may also award special mentions, worth €150 each, to research projects considered particularly noteworthy.

Eligible applicants include Master's graduates who obtained their degree from an Italian university with a final grade of at least 105/110 in one of the scientific, technological or economic disciplines specified in the call for applications, as well as PhD graduates in Food Science, Technology and Biotechnology or related disciplines. Theses are eligible if the corresponding degrees were awarded between July 2024 and November 2026.

Applications must be submitted by 15 December 2026, exclusively through the dedicated online form, available at: https://forms.gle/FWft2ME1z7m4N6pb6

The winners will be announced by 28 February 2027 and will receive their awards during the Pastaria Festival, scheduled to take place on 24 and 25 May 2027 at the Stazione Leopolda in Florence, as part of the third edition of Fiera Pastaria & Festival.

During the award ceremony, the winners will briefly present their research to an audience of professionals and representatives of the pasta industry, helping to promote the transfer of scientific research findings to the manufacturing sector.

The full call for applications, including eligibility requirements and application procedures, is available at www.pastaria.it.


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