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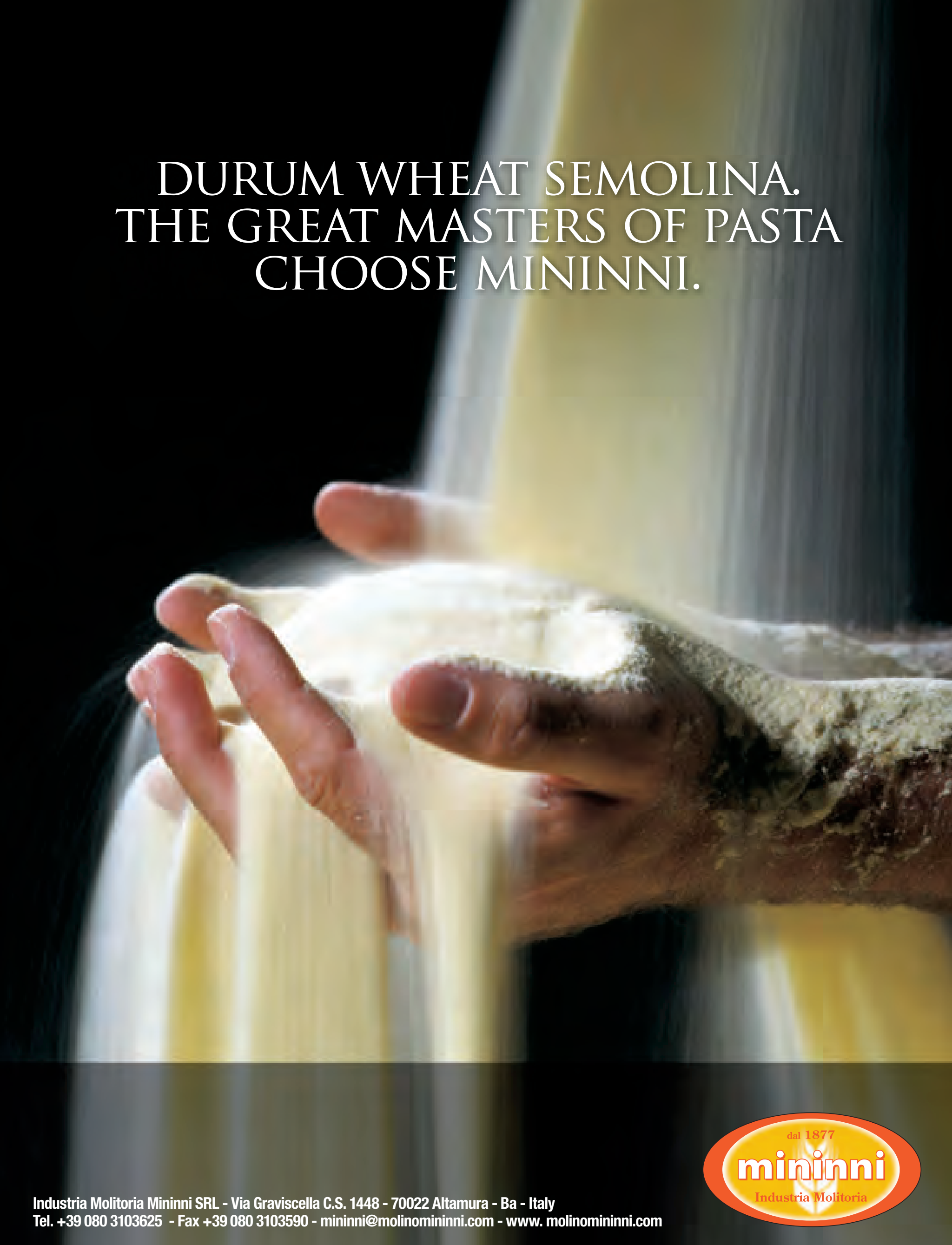
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Starting Out

Hunger for success, inspiration and diligence are the hallmarks of success of entrepreneurs emerging from simpler towns, where glamour may be lacking but the quieter and gentler way of life as well as the desire to hang on to local roots are assets in their own right. Born and brought up in a humble city Indore, Central India, Dhruv pursued a career in engineering and later availed an MBA from IIM Kozhikode. He worked in a consultancy company for few years where he gathered insightful global exposure. Bhavya, post graduate in finance, worked with a consulting firm 'Levers for Change' in the finance and operations functions.
Entrepreneurs tend to be highly enthusiastic about what they do, and most business owners would not stop even if they won the lottery, according to a survey. "One can move ahead in business only with an extraordinary commitment to its success; it's very personal," says Dhruv Muchhal. "We both left our jobs to lay stepping stones for a brand new entrepreneurial journey."
Landing in Indore, they researched their options and, stemming from thorough technical background, occupied a sick unit to start manufacturing wire enamels for a multinational company. "While this decision gave an understanding of the how-to's of business, the nature of the job was not gratifying enough. We needed to do something else; perhaps very different from others, yet very close to our hearts."

The launch pad

Creation gives the best fulfillment and gratification. Many entrepreneurs who start well, sometimes get distracted by the comforts and easy money. To best understand the value of money, one must earn it with own sweat. "Startup life is full

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of ups and downs – one needs to love a challenge. Assorting food consulting experience from job days and hundreds of scribbled thoughts on ‘what ahead’, we streamlined our ideas towards the food industry.” Food, as an industry, has grown into leaps and bounds. From manufacturing, sourcing, retail to exports, the avenues have truly grown in huge proportion. Explains Dhruv, “I first explored the snacks market, but found it to be over crowded with plethora of big and small manufacturers across the country. Researching through the list of items imported in India, I found out that pasta stood quite high in the list. Hung up on this, I went into a deep inquiry-right from reasons, suppliers, consumption patterns etc to find an answer to the question- “Why should we use imported pasta when we can make the best quality pasta ourselves, here in India?” This thought was followed by a study on authentic ingredients, their sources, manufacturing process, scope for marketing and legal considerations. “I tapped a huge gap in domestic manufacturing of high-quality pasta; I knew I had found my answer.”

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The stepping stones of Finosta

It was in early 2015 that the Muchhal family decided to set up a Pasta plant in Indore, Madhya Pradesh. To instill the best technology into processes and learn about the conditions required to produce the optimum product, they went to Italy and Gragnano village (to get a hang of the nuances of making the product.

“Getting the right technology is as important as providing best possible conditions to efficiently and effectively use the technology. Putting the pieces together, in the process, we created a plant matching International guidelines for manufacturing pasta in the most hygienic conditions” elaborates Bhavya.

Integrating a like-minded, capable team with pragmatic food technologists ensured that the effort resulted into premium quality pasta. The product attributes have the competencies to compete with any global brand and excel in the parameters under consideration.

When the going got tough

While many think that it’s tough to go global, most of their challenges came from the native. “Our biggest challenge was,

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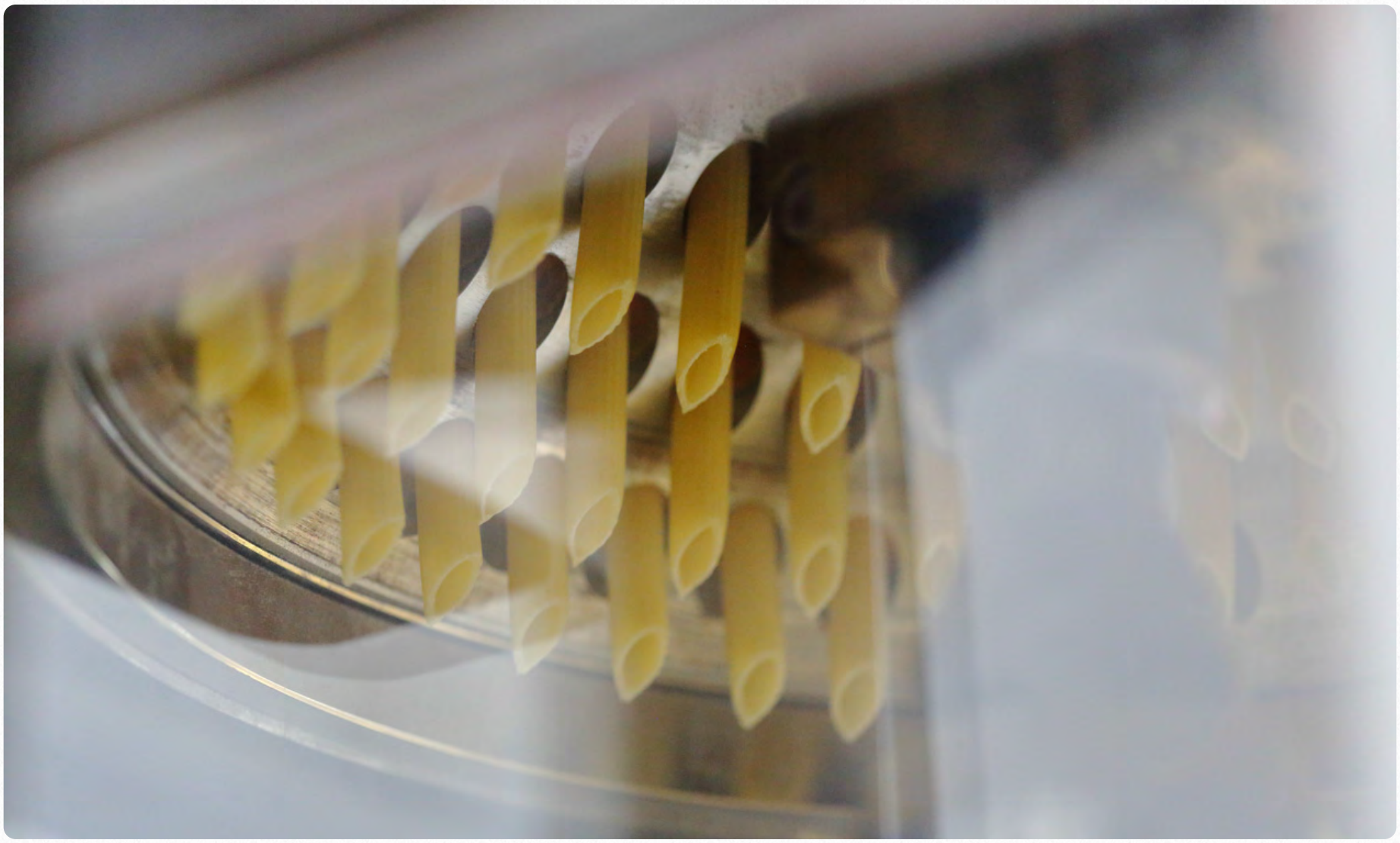


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and still is, to change the psychographics. Existing production of Indian pasta comes in low quality and cheap price, which is why Indians prefer buying imported pasta. With Italian technology put into process, we've already met the quality benchmarks; but being an Indian brand, it is extremely tough to communicate this and change the mindset towards domestically produced pasta. It's easier to get local to global, but a humungous task to do vice-versa."

"Many new age entrepreneurs want to get into immediate return ventures like e-commerce or financial consulting. But to get into a traditional industry, identify gaps and endeavour to turnaround with high quality facelift gave me the thrill to make this happen," Dhruv adds.

We're in this together

Dhruv acknowledges the participation of his family members into the business as the biggest strength that holds them together as a business group. "My learning and success could not have been possible without the support of my family members who are an equal part of this venture. My father, Mr. Rajiv Muchhal (chemical engineer) has over 30 years experience in cropping up successful business ventures including a pharmaceutical unit, a distribution house and real estate development.

The essential in three ingredients





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Fino Foods benefits from his rich experience that brings along an excellent network, leadership traits, contacts and market knowledge."

"My brother, Bhavya Muchhal has profound consulting experience on various projects involving cost cutting and optimization, financial planning, marketing strategy for various multinational and reputed companies. Such background, coupled with qualities of persistence and understanding of the best manufacturing practices, has contributed to establish Finosta as a premium quality pasta brand."

From idea to Fino Foods

Fino Foods Private Limited produces high quality pasta, including Penne, Fusilli, Elbow Macaroni, Shells and Vermicelli, made from Durum Wheat Semolina, under the brand name 'Finosta'. Production capabilities support manufacturing of more than 3000MT per year of short cut pasta. The process is fully automatic and PLC enabled ensuring no human touch to foster

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desired hygiene. The quality control laboratory is one of the best and stringent inspection checks leave zero scope for doubt at all workstations. More products are in the pipeline that will soon be a part of the offerings. Dhruv happily adds, “It feels special to be recognized. True acknowledgement for our effort came from the European clients, who were particularly appreciative of the authentic colour, traditional characteristic flavour and optimum cooking characteristic of our pasta.”

“Also, to constantly value-add to business, we ensure to remain updated about trends & techniques in pasta manufacturing. Thanks to publications like Pastaria magazine to bring us plethora of knowledge for identifying the best sources for raw material, technology partners as well as potential customers.”

Road ahead

“My father never consumed pasta. I do now and my daughters love it far more than anyone else in the family. The de-



mand for pasta is only going to grow manifold times in the decades to come. Understanding this opportunity, we plan to get into the complete line and length of pasta, offering what you call ‘the complete basket’. Looking at the way our pasta is getting admired, we should soon be able to get a vast presence across India. In the longer term, our vision is to establish Fino Foods as a leading global player of high quality pasta of all kinds,” Dhruv envisions.

Success recipe

“Our story so far has been built around an ambition to make a truly world class product which not only provides value to the customer but also imbibes a sense of trust and belief in them with respect to the sanctity and purity of the product. It’s the ethos we put in our work that reflect in our actions.”

“Our success recipe for achieving this is simple. We plan out everything on paper, set timelines with goals. Yes, you don’t meet the deadline every time, but at least you know you are progressing in the right direction. Clarity on where we were and where we want to be, gets us going,” they sum up.

Great pasta comes from brands that perform what’s right for all. Fino Foods gives back to communities, source ingredients in a responsible way and care-take the environment, for they believe ‘growth should not come at any cost’. Acting responsibly, employing, encouraging and empowering the right kind of manpower are some of the other factors that value-add their brand identity.

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Storci has always been attentive to its customers and to implementing cutting edge technological solutions which always respect the tradition of pasta.
To achieve a product of even better quality, the company from Collecchio (near Parma, Italy) has improved the performance of its machines: they now offer a simpler and more accurate control for dough level and extrusion pressure management, thanks to the installation of software procedures specifically designed for these processes.
As well as the already tried and tested excellent system for mixing and dosing raw materials, thanks to this latest innovation, it is now also possible to keep the level of dough and dosing of water (or other liquids, e.g. liquid egg, used to make it) inside the vacuum tank constant.
This results in the pasta having a more uniform color and better consistency.
Management of the temperature control for cylinder and head thermostatation also contributes to achieving this result (temperature changes are reduced to just a few tenths of a degree), making it possible to maintain a constant extrusion pressure.
All this also makes it possible to keep dough consistency and (during the extrusion stage) product shape under control.



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3

Pasta, rice and noodles in Spain

Euromonitor International



A look at data on consumption of pasta, rice and noodles in Spain.

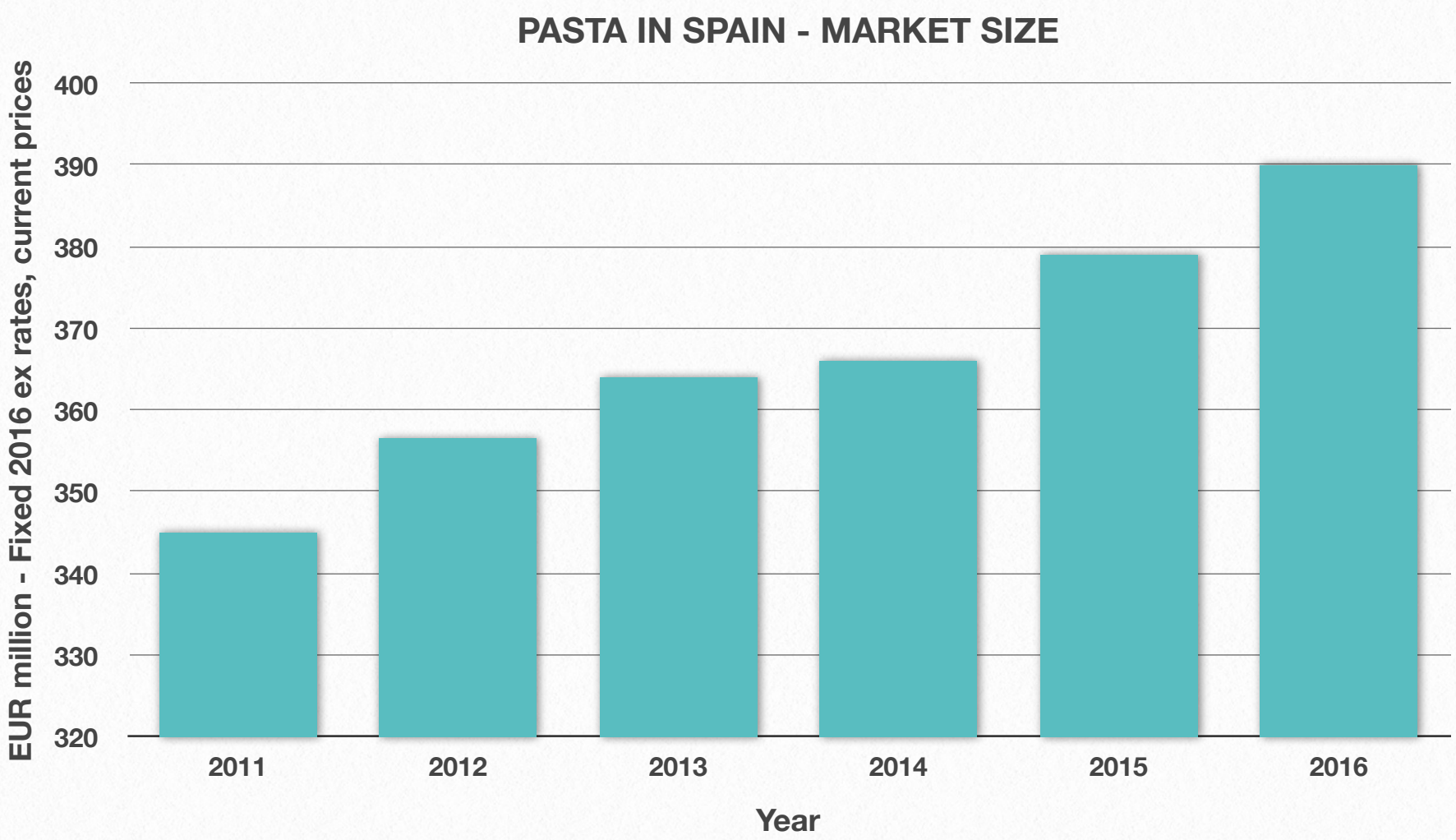
According to Euromonitor International, rice, pasta and noodles has seen a different performance in terms of volume and value sales in 2016 in Spain, with the category seeing a stronger performance in current value terms compared to retail volume terms

Pasta has seen a healthy increase in current value terms in 2016 due to the higher prices of raw materials such as durum wheat but it has seen a slower development in volume terms because of the absence of innovation, higher prices and competition from noodles. Dried pasta is a really mature category in Spain with little room to grow, but that is not the case for the chilled variety. Its consumption is not as popular as that of the dried variety due to its lower penetration in retailers and its higher price (more than four times the price). However, Spaniards have shown their taste for novelty and innovation and chilled pasta is much more likely to introduce new flavours, fillings and types than dried pasta. 2016 confirmed this trend, as chilled pasta has grown by 6% in current value terms and 5% in volume, while dried pasta has increased by 2% in current value terms and 1% in volume terms.

Rice, pasta and noodles products are mainly sold through supermarkets, which accounts for a 57% value share in 2016. Supermarkets, hypermarkets and discounters accounts for a combined 85% value share in 2016 leaving specialists and small retailers with little space in the category.

Novelty and innovation are the strategies that have worked well for companies during 2015 and 2016. Dried pasta and rice have shown how difficult it is for mature categories to achieve high growth rates and companies have started to focus on newer varieties such as chilled pasta, with much more attention being given to introducing innovation and new recipes or health and wellness products such as high fibre rice.

The 2015–2020 forecast period is expected to see a similar performance to 2015 and 2016. Some consumers might switch from non-health and wellness dried pasta and rice to more nutritious varieties but the top categories will likely see little change. Examples of productive categories could include high-fibre rice or whole grain pasta, which have performed posi-



Source: Euromonitor International

tively in 2016, as well as exotic alternatives which are always appreciated by Spaniards.

On the other hand, as was seen during 2015 and 2016, chilled pasta and especially instant noodles are expected to maintain healthy growth rates and see new launches that will bring energy to these categories. Therefore, the best opportunities over the 2015-2020 forecast period seem to be focused on health and novelty and specialisation, with a focus on new flavours and recipes, as companies try to create tasty mixes between other cuisines and the Spanish Mediterranean diet.

Healthier varieties, especially within rice and pasta, started to perform dynamically during the 2011–2015 review period. Industry sources think that these products might experience a strong increase in the near future, as their flavour is really similar to the original options but they are seen to be better options inhealth terms. As long as studies and companies continue to claim the benefits of these products, there is no reason to think that this trend will not continue during 2015 - 2020 the forecast period.

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4

Fresh Italian pasta: the story of overwhelming success

Justo Bonetto
Secretary general APPF



Historical photo in the Rana household. To the right of the President, Mario Fioravanti, Justo Bonetto, Luciano Avesani and Remigio Marchesini

The men, the pasta factories, the standards and the technological innovations which, in a just few decades, have turned fresh pasta into a major success story in the field of Made in Italy food. Justo Bonetto, Secretary General of the Italian Association of Fresh Pasta Producers, and one of the leading players in this success

“In the beginning” the then legislator established that fresh pasta did in fact exist and deigned to include it in article 33 of the historical founding Law no. 580 dated 04/07/1967 which dealt, and still deals, with milling products, bread and dried pasta, with the laconic and permissive text “the production of fresh pasta is permitted”. 35 years went by before it was defined by more structured and current standards when, driven by a business which had soared and become important all over Europe, it became almost compulsory to lay down some clearer indicators. The “new” standard, Presidential Decree 187/2001 with the implicit and providential recognition of the fundamental term “fresh”, a claim which had been forever an unsolved problem of the *Codex Alimentarius* and all other legislation, indicated the end of the uncertainties and trade barriers which had become unsustainable in the new extended markets. And it was also the beginning of an autonomous path for fresh pasta which for a long time had been living in the shadow of dried pasta, almost an optional corollary of the same, often confused in definitions, in restrictive legislative implications and even in market statistics under the generic name of “pasta”.

The growth and economic development over time of the fresh pasta market and the natural complement to this range, gnocchi, are eloquently commented by observing the graphs included in these pages, without going too far back into the depths of time, from 1997 to 2016. A triumphant march for fresh pasta, constant and steady growth for gnocchi. Since 1989 both products have benefited from the protection of the Associazione Produttori Pasta Fresca (APPF) (Italian Association of Fresh Pasta Producers) which has made a marked contribution to the vital national legislative framework and the defence of “fresh pasta”. And it is no coincidence that the Association has Giovanni Rana as its president. The APPF is active in the European market via the ECFF (European Chilled Food Federation), an association which brings together and helps a large number of chilled food manufacturers from all over Europe.

Some significant data. The value of fresh pasta currently manufactured in Italy and sold in Europe has almost tripled over the last twenty years and sales have quadrupled in Europe over the same period. It is worth more than 29% of the dried pasta sold around the world; in supermarkets, fresh pasta is displayed in the chilled section where it has a short and defined shelf-life, which is certainly a limiting factor on sales. Bearing in mind this constitutional handicap, it is easy to understand why the figure of 29% in relation to dried pasta is

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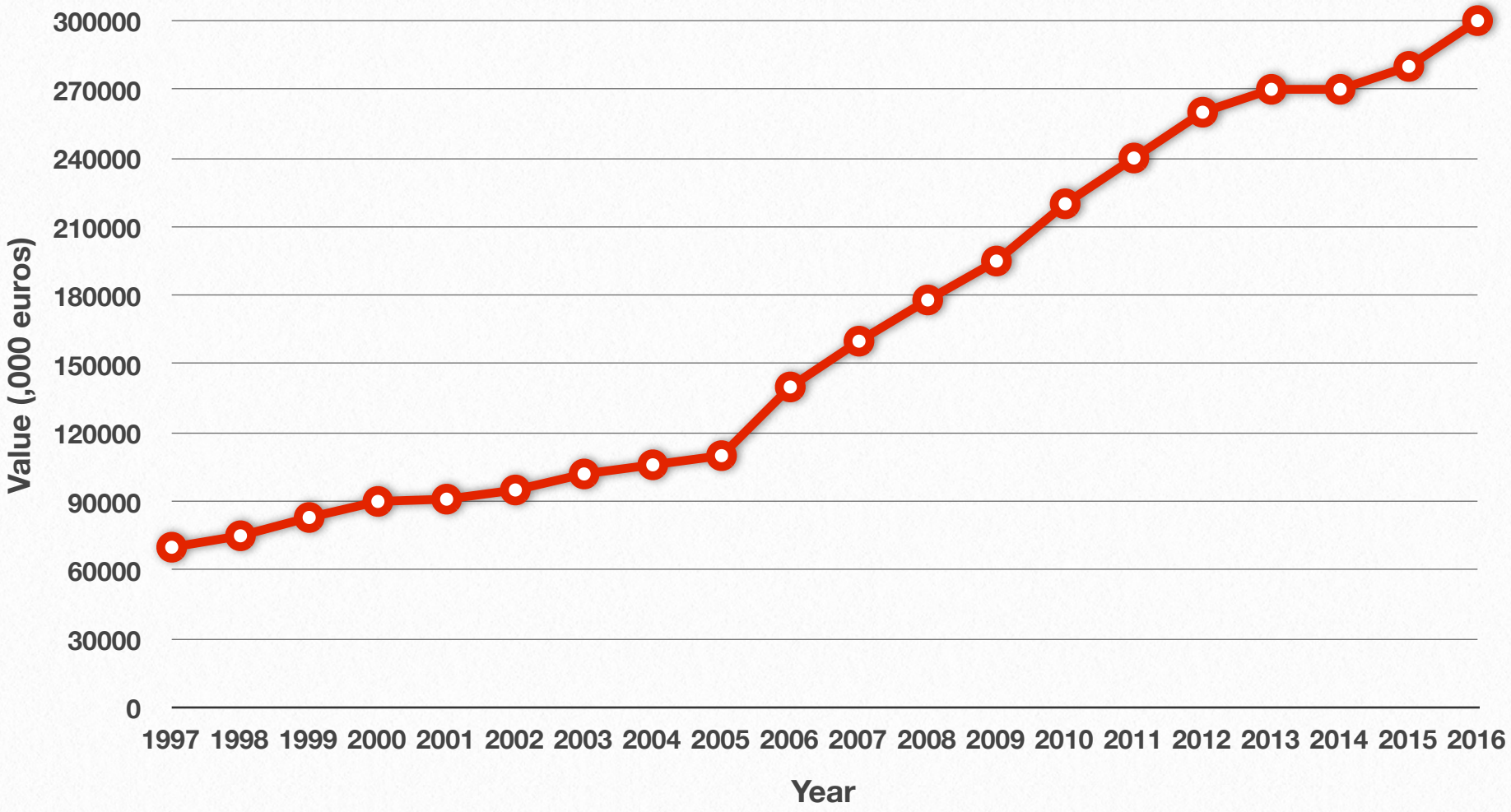
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Graph 1 ITALIAN EXPORT IN EUROPE OF PACKAGED FRESH PASTA (SALES VALUES)



Source: APPF estimates on internal data

an enormous achievement which would have been unthinkable ten years ago, a value which must be reflected upon in order to be able to define the relationship between the two types of pasta. Fresh Italian pasta is the absolute leader in European market sales, overwhelmingly successful in France, England and Spain. The German market, rather unruly to date, went very well in 2016, focusing more and more on quality; slowly, slowly but constantly, the markets in Northern and Eastern Europe are growing, awaiting to take on Russia when the disputed trade sanctions come to an end.

Today at least 35% of Italian production is destined for the European market and certain important companies produce almost exclusively for EU countries. Real manna from heaven which has gone, *ad abundantiam*, to counteract the fatal drop in internal consumption caused by the general downturn in consumption after 2008 and due to the effects caused by the physiological saturation of the filled pasta market in Italy. We should remember that over time, the consumption of filled pasta has gone from being an occasional treat, eaten 2/3 times a year (Christmas and Easter) to appearing on the dinner table almost twice a

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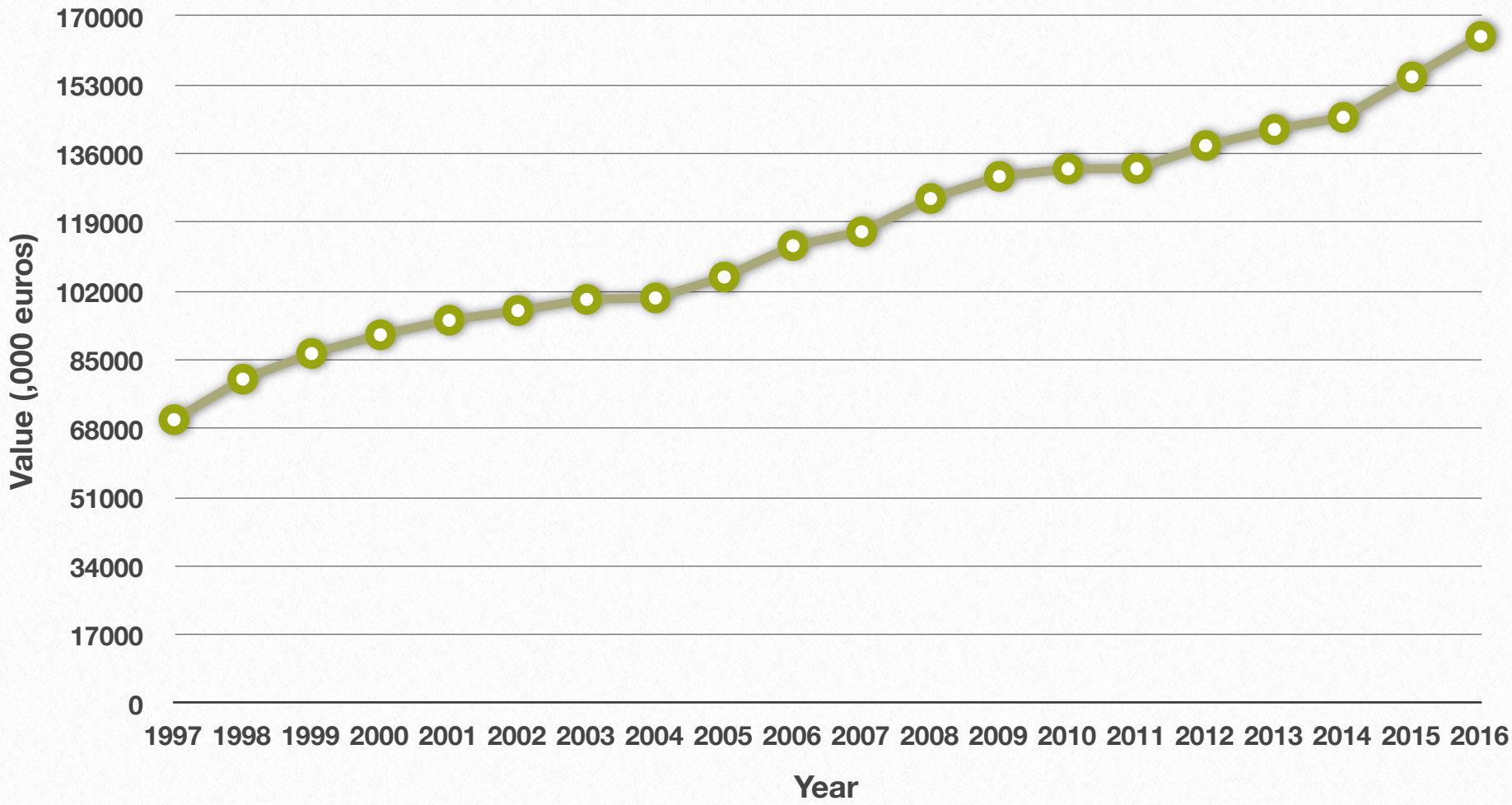


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Graph 2 ITALIAN PRODUCTION OF PACKAGED GNOCCHI (SALES VALUES)



Source: APPF estimates on internal data

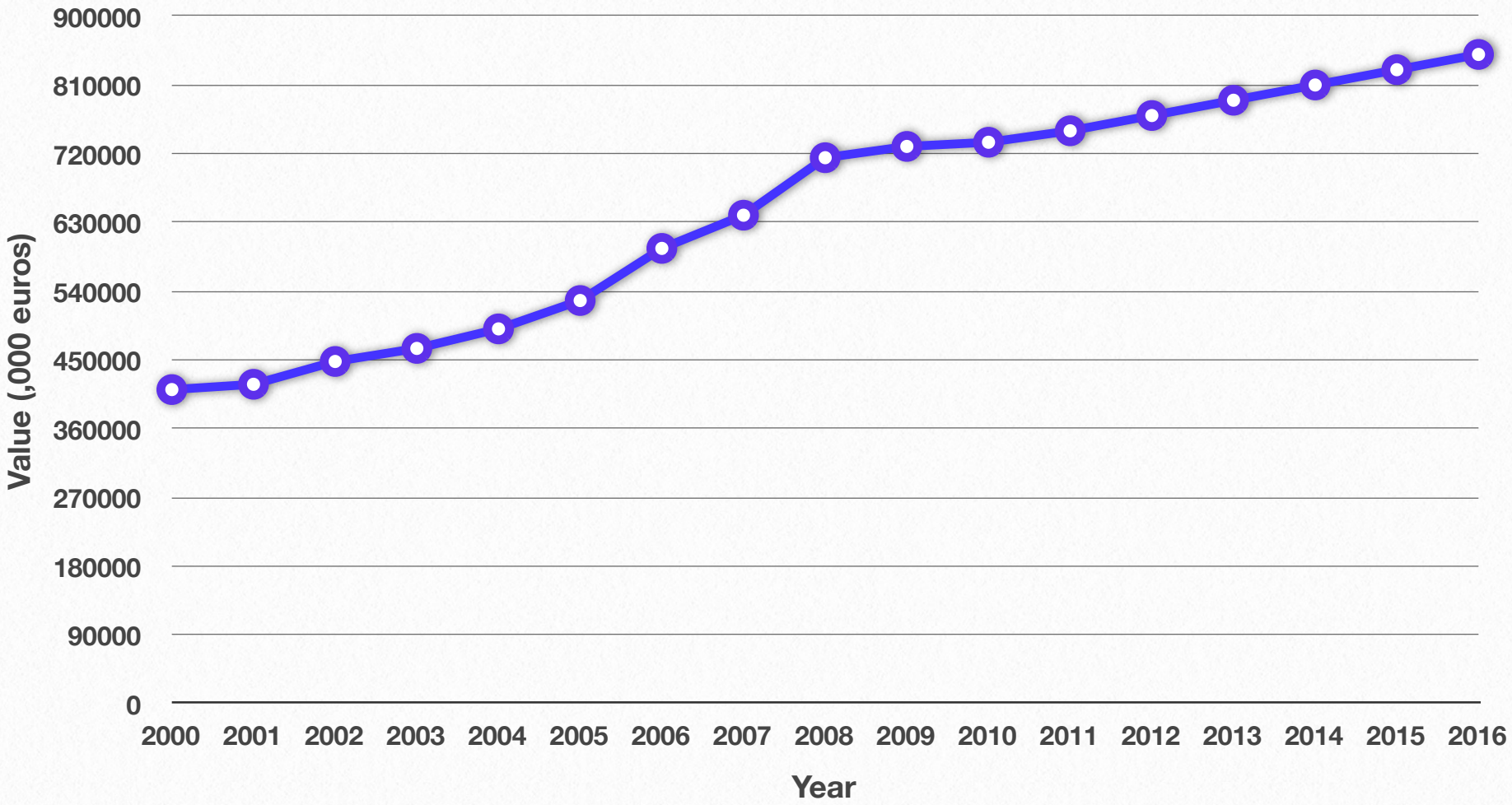
week, creating a peak which is difficult to exceed.

The reasons behind the success of fresh pasta, an exploit which we think may be unique in the Italian food scenario, are multiple causes and conditions which we will try and explain.

For the pasta, one of the conditions, and by no means a small one, lies in the name: "fresh" is an unequivocal synonym of quality and being able to boast this adjective with impunity, i.e. in observance of the law and claims, is a fundamental factor. When, back in the 1990s, definition of the permitted shelf-life period for fresh pasta was a matter of opinion, there was a never-ending "dispute", especially with France which demanded or rather wanted to prevent fresh pasta from being allowed to remain on sale in their country for over 3 weeks. Italy won the dispute and only in hindsight can the importance of this fact be understood.

Thanks to the opportunities and possibilities which fresh filled pasta has to vary *ad libitum* its fillings, (tortellini are the "core-business" representing approximately 75% of the total value), not to mention the flours used (not necessarily just wheat flour) and with the different types of finished pasta

Graph 3 **ITALIAN INDUSTRIAL PRODUCTION OF FRESH PASTA (SALES VALUES IN ITALY)**



Source: APPF estimates on internal data

(standard pasta, filled pasta and now also lasagna and ready meals) possible, it is easy to create an infinite number of different *ready* and *not ready* meals to fully satisfy the pressing demand for novelties which the market suggests, or rather imposes.

And the increasingly close symbiosis with gastronomy which only fresh pasta, as a "genetic heritage" can offer, becomes an irreplaceable catalyst for encountering the tastes of today's European consumer.

Twenty years ago there were 4-5 fillings for filled pasta, now there are more than 300!.

Fresh pasta was quick to understand the need to make the pasta sheet thinner, mainly for organoleptic reasons, but also for the more banal reason of drastically reducing cooking times which (even these) have become an important sales factor for today's rushed consumer. It quickly grasped that the world was tending more towards "vegetable" and quickly adapted, also by inventing new and less traditional formats. Driven by the market, it is setting itself up for organic and gluten-free products where it will know how to impose its innate qualities.

On the topic of health safety and maintaining the organoleptic quality for the duration



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of shelf-life, which refers to an optimum time period of 50/60 days, basically essential for European marketing, the fresh pasta industries have dedicated maximum care and attention. The definition and adoption of a single heat treatment, which has become a very widespread practice, avoiding the limiting effects of in-pack pasteurization, was another technical element put into practice by many, a free bearer of improved quality combined with the clean rooms in the packaging stage.
The latter is a significant technological leap forward, in some ways comparable to the adoption of the protective atmosphere, an ace up the sleeve in an uninterrupted path of quality, avoiding that exclusive recourse to compulsory pasteurization, which for a long time was erroneously considered the only chance of increasing product shelf-life. The so-called hurdle-technology which was oddly ignored, especially abroad, the application of which was almost instinctively implemented initially by the technicians in our companies, later became a must, creating significant scientific gap. The impact on the quality of such technological applications has been palpable and incredibly significant for maintaining the quality on which fresh pasta thrives.
As we were saying, fresh pasta and gnocchi have been enjoying continuous growth, heedless of the obstacles posed by the increasing attack brought along by the adoption, almost generalized, of low-calorie diets on the one hand and the abominable "junk food" diets on the other. It is resistant to the difficulties and limitations imposed by scandals which failed to affect it (horse meat), to the "low-carb" bogeyman who so upsets the Americans and all the other disparaging fake news which periodically invades the food scenario, including, alas, the fresh pasta one.
The gnocchi industry has grown alongside the pasta one and since they often have the same manufacturers, it has moved, as we have seen and as shown in the Graph 2, in a sort of "slow motion" but with unyielding tenacity. Over the last few years there has been an approach to what is "new" with the necessary changes to the formula, including vegetables more frequently, even replacing the traditional potato flake ingredient with fresh potatoes.
There are many successful fresh pasta and gnocchi makers, in fact almost all of them have prospered, if you exclude the few that followed the disastrous path of poor quality and bankruptcy prices. Starting with the real artisans, those with the production facility at the back of the shop, who as well as representing tradition, have been and are still an important source of Italian-style imagination and inventive



From left, Giovanni Rana and Giovanni Voltan, the two “great elders”, fundamental players in the Italian fresh pasta sector

which they know how to bring to the whole sector; then there are all those other operators (of which there are many) who stand somewhere between artisanal and industrial, with facilities which are sometimes inadequate and very often insufficient to allow them to really take off: these are also positive for the market but are held back by their facilities and are almost always without that European commercial outlet which has almost become a must for living, and prospering as opposed to just surviving.

Moving on from the categories to the individuals, it seems superfluous to cite, first of all Giovanni Rana, who – *ça va sans dire* – is in a different league. But he is much, much more.

Looking beyond his merits, he has become a symbol identifying fresh pasta, he is without doubt the “top founder” not only in Italy but all over the world. His face and his name have become synonymous with fresh pasta and quality which he also expresses through, and with force, his exceptional media communication techniques which joyfully seems to promote a plate of tortellini or of gnocchi in every sense. It was he, together with Giovanni Voltan, in a providential mission who decidedly turned the tables - a strategically essential move - on the dreadful reputation held by the fill-

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ing of the very first tortellini (made up mainly, vox populi, of "*mortadea de musso*" (Venetian dialect for mule *mortadella*) and to shift the center of Italian tortellini production from its traditional home in Emilia to the Veneto. But fundamentally, Giovanni Rana has skillfully put into play, basically all, or almost all, of the winning technical, commercial and company management moves mentioned above and, not to be overlooked, he invented those media communication techniques. In this he has become an example to be followed, above all bestowing a bonus on the whole category. Today's manufacturers and those of tomorrow are certainly in his debt for all of this.

Then there was the historical, and winning, opposition he put up against the campaign to acquire his company by the so-called multinationals in the 1990s. A real champion and *ante litteram* of Made in Italy which cannot be separated from the absolute bar on relocation of the industry to countries with lower labour costs. Recently Giovanni Rana gave another signal, the umpteenth indication to followers: a bold investment in the United States which was promptly followed by an incredible commercial success in a new world where the multinationals live pretty well, so to speak, on frozen fresh pasta. An opening which clears the road to really unthinkable worldwide scenarios for fresh pasta.

Giovanni Voltan is the most important name in the fresh pasta industry in a context where Giovanni Rana is, as we've said, a hors classe. But this other Giovanni, also a company founder, has merits and outstanding qualities. What's more the two are great friends, mutual admirers, both from the Veneto region and peers – as someone has aptly called them they are "the two great elders of fresh pasta." In a wholly family-run company, now operating in its third generation, Voltan is equipped with all the trappings to make rapid progress; inventiveness is something he has never been short of, just as it is true that his father, Giovanni, knew to apply the pasteurization process to pasta, with a providential, albeit rudimentary blanching technique, in an initial step forward in the quest for a long and safe shelf-life. Giovanni Voltan, now the Voltan Group due to the various companies it has recently acquired, has now started to progress quickly and it has launched itself with great success in the difficult and demanding UK market, thanks to its strong technical staff of major importance.

In the "founders" and innovators category I must also include, for the merits acquired, an ex, Franco Cicolin of the PAF company from Verona. Franco, who prematurely left











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Award presentation to the late Carlo Rossi. From the left: Justo Bonetto, Giovanni Voltan, Carlo Rossi, Giovanni Rana and the unfailing Remigio Marchesini

the scene (in the 1990s) due to a cruel physical *defaillance*, unfortunately did not find adequate successors. But his PAF, once leader in gnocchi and top-price filled pasta, left a very important company mark (no bank financing, company shareholding, etc.). Cicolin's PAF had quality control and R&D facilities which were ahead of the times, including an internal analysis laboratory and three professionals who acted as external consultants. I feel it a duty to name one of them, Omero Speri, a genius from Verona, also a consultant to Rana, called, almost forced, to travel to Israel to give advice on... “cold fusion”. An example imitated in the industry in which the value of technical staff has found and still very often finds a direct feedback which is commensurate to business success.

The most important leading players and those who have made the biggest mark in the successes of fresh pasta and gnocchi are largely the ones that I know mostly as members of the APPF, which, may I remind you, encompasses, for pasta and gnocchi, 75-80% of the whole business.

Maffei of Barletta, APPF members from the very beginning, interpreter of an extraordinary business growth supported by the development of fresh semolina pasta which has also asserted itself by virtue of the characteristic pasta shapes of Southern Italy, Aquilino Di Caro's Lo Scoiattolo, which for a long time has been at the top in

terms of quality and quantity of fresh pasta, with an enviable penetration of European markets, the Avesani, another Verona company that is constantly growing and is distinguished by the excellent quality of its production, Madini's Italfood, a company born from the rib of PAF which holds the record for quantities of plain pasta in Europe where it sells 80% of its products. Bertagni 1882, miraculously resurrected from the ashes of the legendary Fioravanti, sought its fortune directly in foreign markets, presenting itself with a quality universally recognized as of excellent caliber and bringing home a series of successes, Pasta Fresca Rossi, which following the death of Carlo Rossi, is successfully looking for modern and innovative methods of production, Armando De Angelis which is successfully trying to reposition itself following a complicated corporate turnover, and Mylena which has managed to make inroads and gain lasting acclaim in the very difficult German market.

Then there are the so-called "*gnoccai*" (gnocchi makers), a category less inclined to share company fortunes with fresh pasta, of which I should mention first and foremost, Grandi Pastai Italiani, formerly Italgnocchi from Correggio, long time market leader which introduced gnocchi to half the world and has been appreciated everywhere. Bartolo Palmieri's Ciemme Alimentari, which, unpredictably, transferred Northern tradition to the south, in Barletta, by setting up a plant which is considered one of the best in Italy. Again, Pasquale Maestri's Il Pastaio, a forerunner in quality and imagination in its products that successfully sells nearly all over Europe, Crivellin Carlo, which operates on the market at a profit and now, with renewed and valuable structures, has definitely taken the path of growth. Finally, the Buona Compagnia Gourmet which for some time has been beating the track of the "fresh potato" with good success that the recent rapprochement, as mentioned, to that ingredient will make appreciate even more.

This historical overview not separated from the present state of the art of fresh pasta, but also of gnocchi has the coveted claim - founded, I believe - to have its own characterization, its own identity in the wide galaxies of pasta. In short, a status that if it now finds an easier path in Europe, as devoid as it is of specific vertical legislation, in Italy it still meets with some misunderstanding in its development and some regulatory hurdles. An autonomy, if truth be known, above all in concept, justified by its history, its successes and almost demand for its real possibilities for further development. All the more so now that unexpected horizons have opened up overseas.

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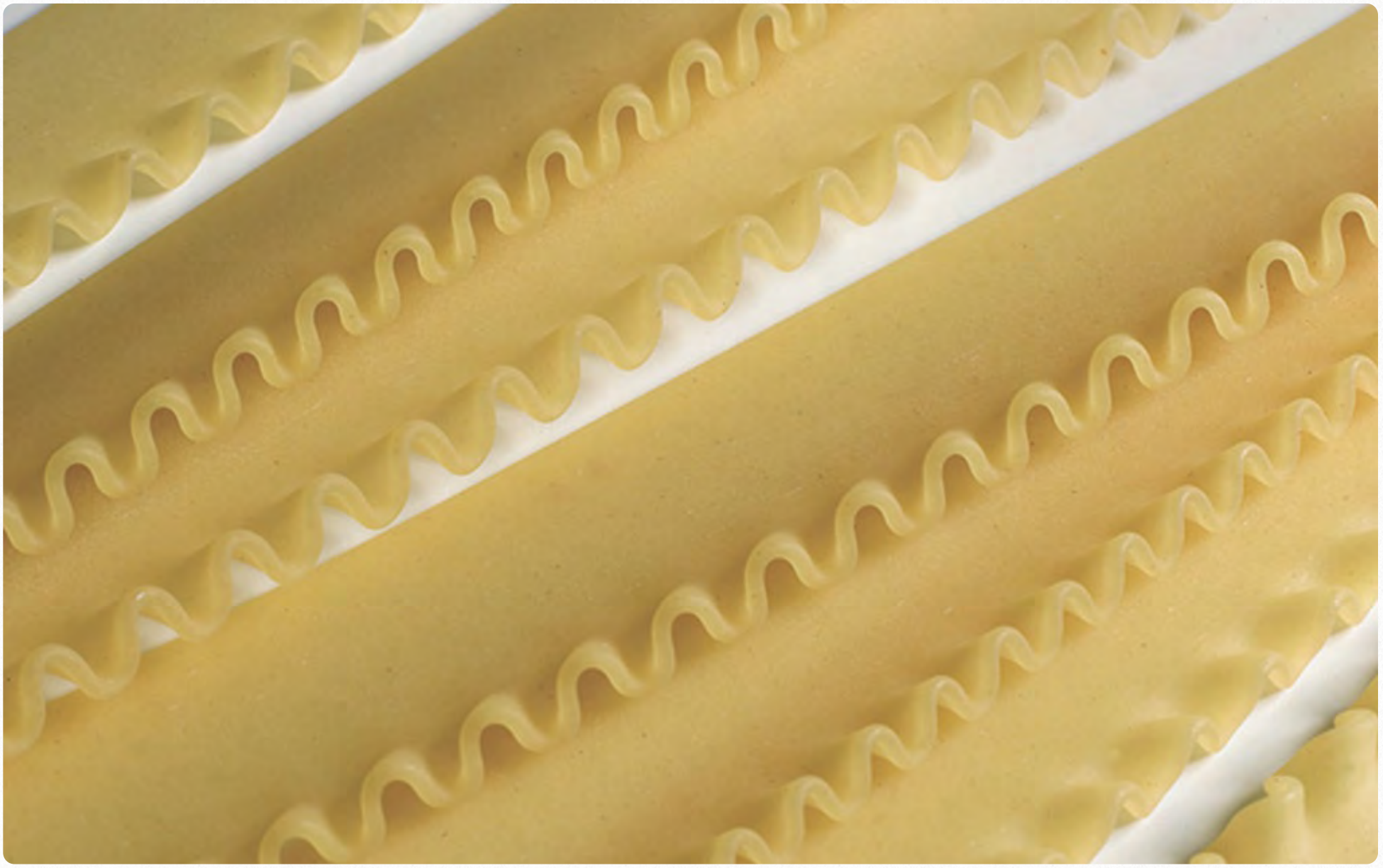
SOSTENITORI - FORNITORI

- **MOLINO CASILLO** | Corato - BA
- **EUROVO** | Imola - BO
- **LCB FOOD SAFETY** | FRANCIA
- **PAVAN IMP.** | Galliera Veneta - PD
- **PARMOVO** | Colorno - PR
- **GRISMEC** | Ornago - MB
- **SALUM. LANZARINI** | Bassano - VI
- **MOLINO SONCINI** | Sorbolo - PR
- **CARTA STAMPA** | Briosco - MB
- **ADEA** | Busto Arsizio - VA
- **TECNESSENZE** | Minerbio - BO

5

News from Abimapi. ABIMAPI Directory 2017

ABIMAPI



“News from Abimapi” is the regular column of the Brazilian Manufacturers Association of Biscuits, Pasta and Industrialized Breads & Cakes, to keep those in the trade informed about the association’s activity and what’s new on the Brazilian pasta and baked goods market.

The ABIMAPI – Brazilian Manufacturers Association of Biscuits, Pasta and Industrialized Breads & Cakes, has just launched the new edition of the ABIMAPI Directory 2017, the publication will be the reference vehicle of the segment, since it gathers a variety of important information to be analyzed and consulted by entrepreneur, partners and suppliers of the sector, increase entities and government agencies, creating a relationship channel that will enable closer relations among professionals in the area.

The editorial content presents ABIMAPI, the overview of the market, industry figures, perspectives of this sector for this year and new technology for the segments of biscuits, pastas, breads and cakes. In addition to having a special chapter for the Brazilian Biscuits, Pasta and Industrialized Breads & Cake export project - our partnership with Apex-Brasil for incentive our sector to export and another of the sustainability project *Dê a Mão para o Futuro* (Give the hand for the future) - which shows the commitment to sustainability programs and aims at the correct disposal of urban solid waste.

Download the Abimapi 2017 Directory

The publication also gathers information on the actions taken by Abimapi to strengthen the commemorative dates (Biscuit Day, World Bread Day and National and World Pasta Day) and to stimulate consumption; also on the themes discussed and results achieved at the 15th International Congress of the industries. The directory will be the voice of the entity before the society for the strengthening, valorization and recognition of the sector. There are five thousand copies in Portuguese, English and Spanish. In addition to the printed version, the ABIMAPI Directory has the digital version for reading and consulting on tablets and smartphones (Android and iOS) with all the possibilities of interactivity that digital publications offer, in addition to the electronic version, is available in PDF on the ABIMAPI website: www.abimapi.com.br.

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PUBLIC Projetos Editoriais

6

Whole wheat flour gnocchi mix

Editorial staff



A whole wheat flour version of the Molino Pasini gnocchi mix is now also available.

Molino Pasini (Cesole, in the Province of Mantua, Italy) has recently put a new product onto the market: whole wheat gnocchi mix.
This product widens the company's range of mixes for producing gnocchi, which already includes the C-catering, Long-acting, Tecnomacchina mixes which are all characterized by being quick and easy to use.
This mix is for cold making whole wheat gnocchi and is ideal for both artisanal and fully mechanical production methods.
The product can be used to make firm, dark-colored gnocchi with that characteristic whole wheat aroma and taste.
It contains no milk or eggs.

For information
Molino Pasini
T. +39 0376 969015
info@molinopasini.com
www.molinopasini.com



WHOLE WHEAT FLOUR GNOCCHI MIX			
Ingredients			
Potato flakes, cornstarch, potato flour, whole wheat flour, salt. Additives in potato flakes: preservatives: E223, antioxidant: E304, acidity regulator: E330, emulsifier: E471, stabilizer: E450			
Sensory features			
Apparence	coarse powder	Odour	characteristic
Color	brownish	Flavour	typical potato
Physical and chemical characteristics			
Humidity	7-8% max	Granulation	<0.9 mm
Nutritional facts (for 100 g)			
Energy	1441 kcal - 342 kj	Fiber	4.9 g
Fat	0.7 g (saturated 0.34)	Salt	6 g
Carbohydrate	76 g (sugar 15.3)	Protein	4.9 g
Allergens			
Gluten, sulphurous anhydride			
Pack			
Packing multilayer paper bags of 10 kg and 0.800 g			
Shelf life			
1 year in its original packaging, keep in cool and dry place			

How to use

It is extremely easy to use, simply add 10 kg of mix to 12.5 liters of cold water in a rotary mixer to make a uniform dough (add the mix to the water and not vice versa), after which, shape the gnocchi and dust with rice semolina or similar.

When placed in a cold store at a temperature of between 2-5°C, the gnocchi keep for a few days. If frozen, cook directly in boiling water.

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7

Technological solutions for the pasteurization, pre-cooking and cooking of pasta

Foodtech



Combined line for pasteurising and precooking with sprayed water (750-900 kg/h). For processing fresh filled and nested pasta

Reliable technological solutions for cooking, pre-cooking and pasteurization of pasta, designed and constructed by Foodtech.

Foodtech (Camposampiero, Italy), which has always always strived to collaborate with demanding customers playing an innovating role in the continuously evolving market of fresh pasta and ready meals, is proud of having been trusted again in 2016 as a supplier by companies both already established and growing, in Italy and abroad. The constant evolution of Foodtech machinery over time has led to technical and material improvements and new technological solutions, for instance in the field of pre-cooking and cooking as illustrated below, with increasing attention to the organization and management of all data, as required by Industry 4.0.

Pre-cooking lines for fresh pasta (filled and nested)

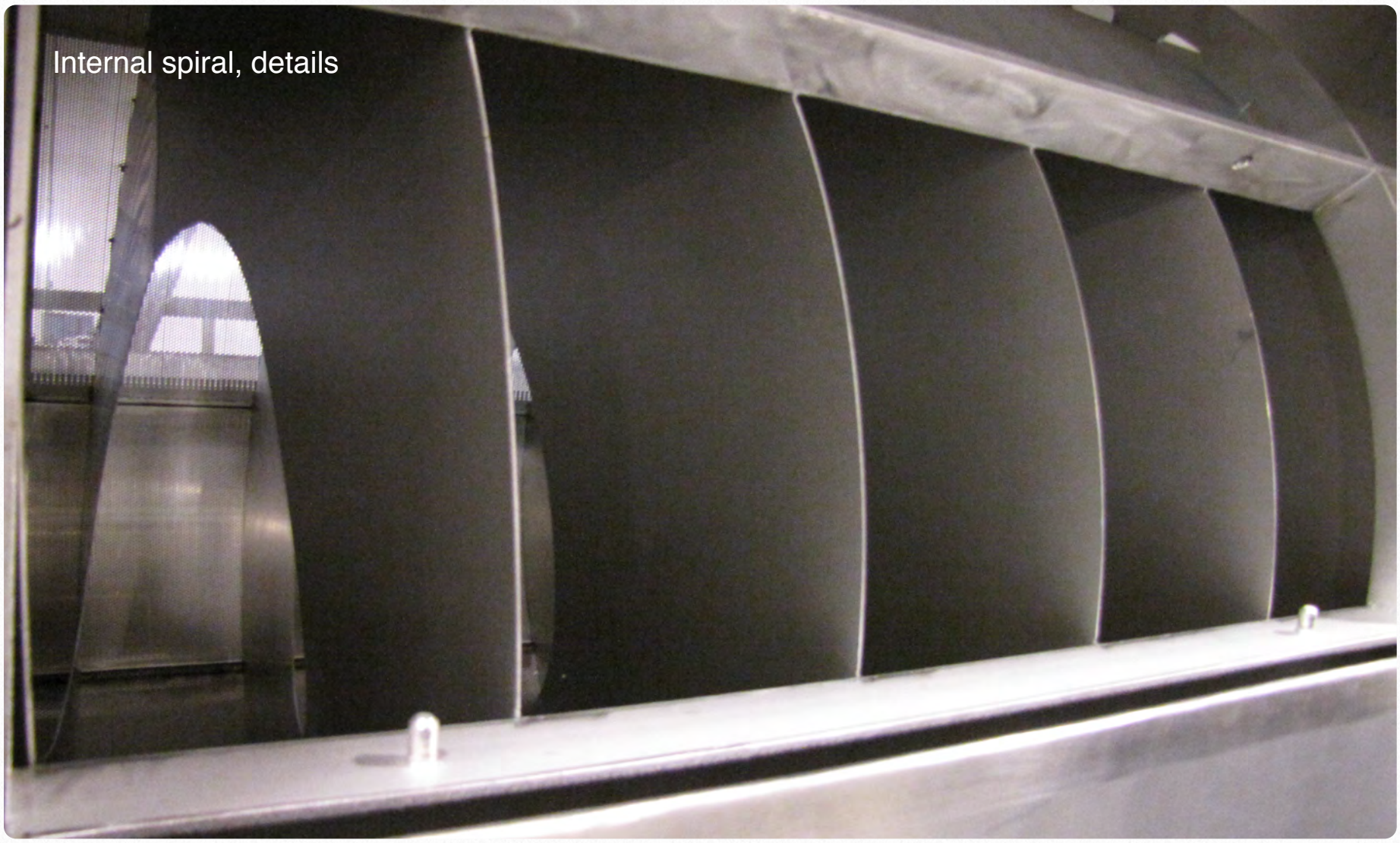
In 2000 Foodtech has realized the first machines for pre-cooking ravioli, cappelletti and nested pasta in a wet steam saturated environment, with the addition of heated water sprayed on the product. The process lasts more than the simple steam pasteurization, it leads to 15-18% moisture absorption in filled pasta, and to a weight increase of up to 40% in nests. Thanks to this treatment the pasta is not deformed or broken, remaining “al dente”, and the final preparation time is reduced, making the product very appreciated in catering. The pre-cooker is completely PLC-managed, and it is therefore possible to program the process parameters for each type of product. The pre-cooker can be used both for pasteurizing and for pre-cooking.

Cooking lines for pasta, rice, etc. (rotary drum cooker)

The rotary drum cooker is a versatile machine that can be used to cook various products in continuous, from short dry pasta or filled fresh pasta, to vegetables, legumes and grains (parboiled rice, black rice, wild American rice, spelt, peas, lentils, quinoa , etc.), with production capacity of 100-200 or 1500-1800 kg/h. The machine is built in AISI 316L stainless steel, complete with heat exchanger for heating the water in the cooking tank, control and programming of the cooking time and PLC-management of the process parameters for each product, water salinity probe, ergonomic opening for internal access, automatic CIP. The cooker is equipped with a starch washing zone, where nozzles spray water un-



Rotary drum, details



Internal spiral, details

Drum cooker with water cooling (1500-1800 kg/h).
For processing rice, dry short and filled pasta



For information
Foodtech
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www.food-tech.it

der and above the product, and combined with a belt cooler, where the product is immersed in cold water at 2-3°C, in order to be cooled before packaging or deep freezing: cold water is sprayed in the cooling tank to move the product and increase the thermal exchange. At the exit of the line, the product is drained. All parts of the machine can be opened, allowing access for the operators for cleaning and maintenance operations.

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LINEA DI TRATTAMENTO PASTA FRESCA (150-1500 kg/h)
FRESH PASTA TREATMENT LINE



Pastorizzatore – Pre-essiccatoio
Pasteurizer – Pre-dryer

Raffreddatore
Cooler

Pastorizzatore con zona di asciugatura
Pasteurizer with drying area



Quadro elettrico generale
General electric panel



Carico prodotto
Product inlet



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TECHNOLOGY PERFORMANCE RELIABILITY

8

Agro-food, false myths and new realities. Ipsos and Tuttofood compare operators' and consumers' opinions

Tuttofood
Press release



The views of consumers and operators from the agri-food sector, discussed in a study conducted by Ipsos, commissioned by Fieramilano, is useful for identifying the trends that will be a major feature of the next five years.

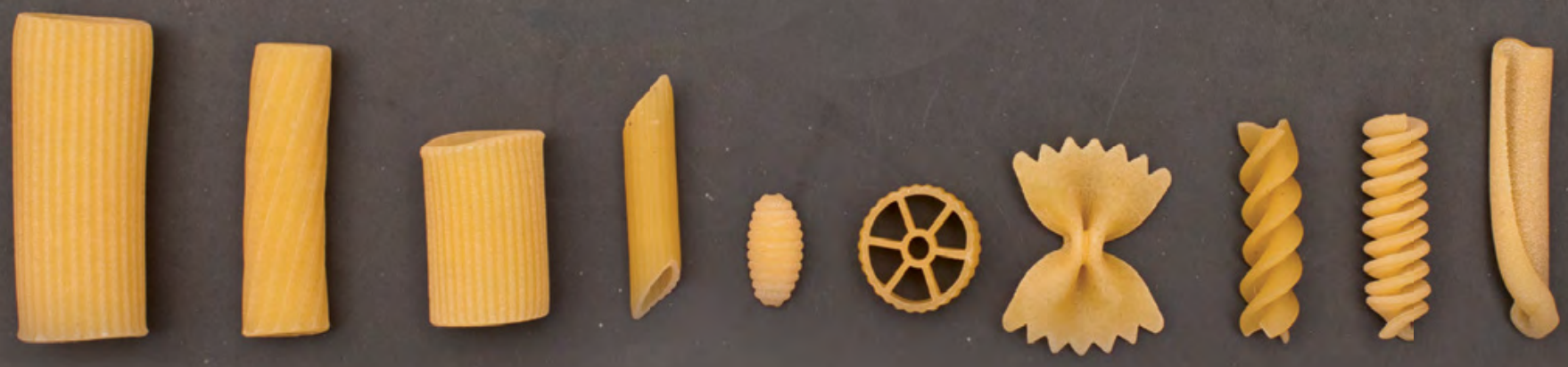
Italy has always put the agro-food industry at the centre of its economy. That's why comparing consumers' and operators' opinions is important to align operators' expectations with consumers' intentions.
An essential passage for Tuttofood, which is also the event of reference for this industry and it will take place in fieramilano from Monday 8 to Thursday 11 May. The research curated by Ipsos aims at understanding to what extent the trends identified by the operators match with those required by consumers, so as to increase the importance of the exhibition and develop a more effective offering.
Ipsos has submitted the same questions to a sample representing the Italian population with an age ranging between 18 and 65 years and to a sample of Tuttofood exhibitors and buyers. This way, they could compare the opinions of the two targets on the next five years of the agro-food industry. The results show that the opinions of the two targets are pretty much aligned.

The organic industry keeps growing and cured meats stand out in the meat industry

The organic food industry will keep growing. The first semester of 2016 recorded a growth rate of 20% in value, and its weight in our purchases will keep growing, passing from 2.5% to 3.1% of the value of the shopping cart, in just one year. A trend that seems unstoppable. 39% of consumers indicate that the purchase of this category of products will further increase over the next 5 years. Frozen ready-to-eat food, indicated by 35% of consumers, and frozen ready-to-cook food (28%) are also expected to grow. 51% of consumers indicates at least one of the two, thus putting frozen food as a leading product for the near future. Pasta (23%), fish-based products (22%) and ready-made meals/sauces (21%) are also reaching new heights. Operators agree with this hypothesis on the future and see frozen ready-to-eat food having an important place in the market.
The consumption of Meat-based products, indicated by 35% of consumers, is decreasing. This negative trend has been going on for about ten

Many shapes to tell it.

Only one association to represent it.



11
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EMPLOYEES

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TONS OF PASTA PRODUCED

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TONS OF EXPORTED PRODUCT

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AN AGRIFOOD SECTOR FOCUSED ON WELL-BEING

A food sector is taking shape which for the next 5 years, both for **CONSUMERS** and **OPERATORS** will be focused on

HEALTH and **WELL-BEING**

✓ **CATEGORIES ON THE UP**

FROZEN and **ORGANIC**

WITH POSSIBLE SYNERGIES, thinking of health foods which are easy to use

✗ **CATEGORIES ON THE DOWN**



MEAT, still penalized by the perception of being unhealthy, but also **LESS FAT**, **SWEET BEVERAGES**, **ALCOHOLIC DRINKS** and **DAIRY PRODUCTS**

- with special consideration for **INTOLERANCES** and **SPECIFIC DIETS**, which however represent **INNOVATION** more than **QUALITY**
- Quality comes from being **DEEP-ROOTED IN THE TERRITORY**, making the most of the many available **LOCAL EXCELLENCES**

AN OPPORTUNITY FOR MADE IN **ITALY**, which however has to protect itself from **COUNTERFEITING PHENOMENA**

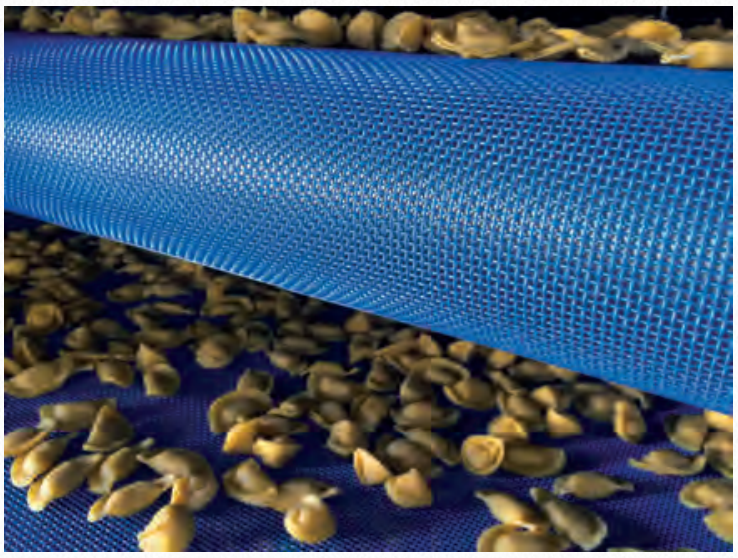
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years now. However, we should point out that products with a high level of service, such as sliced cold cuts, have shown a positive sales trend in the past year. Consumers are also seeing the consumption of oils and vegetable fats (24%), soft and energy drinks (21%), alcohol (18%) and dairy products and their derivatives (16%) drop. This, together with products having a positive trend, show a shopping cart more oriented towards health and wellness, at least in the intentions.

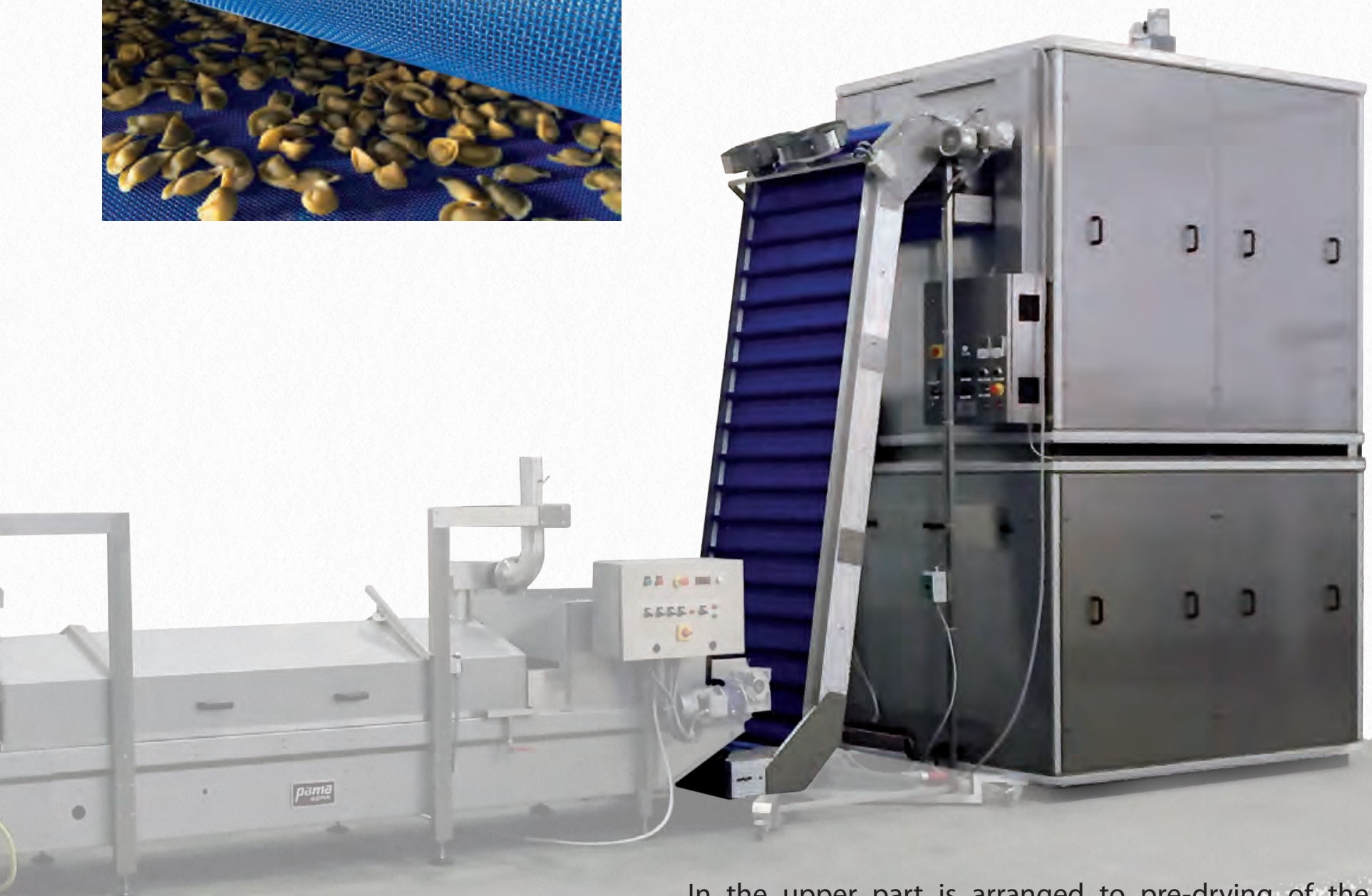
Health and wellness, but also service and price

The health and wellness paradigm involves everyone, even those who want or must follow specific diets, eliminating some ingredients. In fact, the sales of gluten-free products (+20.6%) and lactose-free products (+7.1%) keep marking a positive trend. Consumers think that food innovation lies in products specific for those who suffer from intolerances or follow specific diets (38%), which are growing at a faster pace

great solutions, for small spaces



The need of the pasta factories to produce in small spaces has become over the years a necessity.
For this reason we have designed and constructed a machine with overlapping lines for the heat treatment.



In the upper part is arranged to pre-drying of the various types of formats fresh and stuffed pasta, and in the lower part to the cooling and stabilization of pasta.

PE/RF

Once assembled, the two sides form a single machine, with the two treatment areas completely independent and thermally separated in the management of temperature, moisture and treatment time for a fresh pasta safe and high quality.

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Machines and plants for fresh pasta

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OPERATORS ARE NOTING A GREATER SENSITIVITY TO CERTAIN TOPICS

OPERATORS → Although in agreement with consumers on overall trends, there are certain topics which they hold dear

GREATER SERVICE CONTENT IN PRODUCTS

- they believe in **ready-to-eat FROZEN products**
- they believe in **creating new FORMATS**

The food companies which have **GROWN THE MOST** over the last 10 years are those **FOCUSED ON SERVICE**!

MORE ATTENTION TO HOW THE PRODUCT IS MADE

- **PROPERTIES** of the **raw materials**
- **TRACEABILITY** of origin
- **SUSTAINABLE** production

The **real trend** for the future will be the creation of **QUALITY PRODUCTS** which combine **TASTE** and **HEALTH**, for both man and the **ENVIRONMENT**!

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compared to the past. Innovation also means paying attention to local traditions (indicated by 28% of consumers), sustainability of the chain supply (28%), and using more comprehensive labels (26%).
Operators agree with this evidence, but, unlike consumers, they emphasise new innovative product formats. This evidence, together with the greater attention to frozen ready-to-eat food, highlights how operators are aware of the importance of servitisation in the food industry. The research curated by Guia Beatrice Pirotti (SDA Bocconi – Claudio Demattè Research Division) has shown how service-oriented food companies have achieved better economic results in the past ten years.
In terms of food purchases, the attention for the next five years will focus mainly on two aspects: price, indicated by 56% of consumers, and quality, indicated by 50% of consumers. One consumer out of four has indicated both. Moreover, consumers pay attention to the raw materials used

(44%) and their trust towards the country of origin (44%). Sustainability-related topics are not drivers of food choices yet, even if 34% of consumers have stated that attention towards supply chain sustainability helps determine the perception of the product quality.

According to 46% of consumers, over the next five years, the region of origin of the product will be the main driver of quality perception, followed by the intrinsic quality of raw materials (35%), sustainability, and preparation quality (32%), which require a detailed labelling (25%). Operators agree with consumers also on the main framework, as they both pay attention to sustainability, which will be a distinguishing element in the future.

The region of origin and local products of excellence are crucial for Italy's economy, which invests a lot in these two categories. The export of agro-food products in 2016 has reached € 38.4 billion. However, this value is probably limited to the Italian sounding phenomenon, which produces a turnover of € 54 billion. The problem is extremely clear for both operators and consumers. 61% of consumers thinks that Italian sounding is a widespread phenomenon and can be a serious problem for Italian products, whereas, 10% thinks that it may become a problem in the near future.

Being confused about the origin of a product watching the packaging is easy indeed. This is at least what 79% of consumers thinks. On average, 32% of foreign consumers, especially in India and United Arab Emirates, at least once in their lives, has bought a product that ended up not being Italian.

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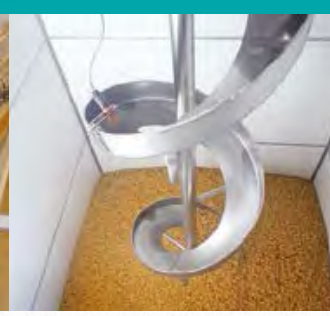


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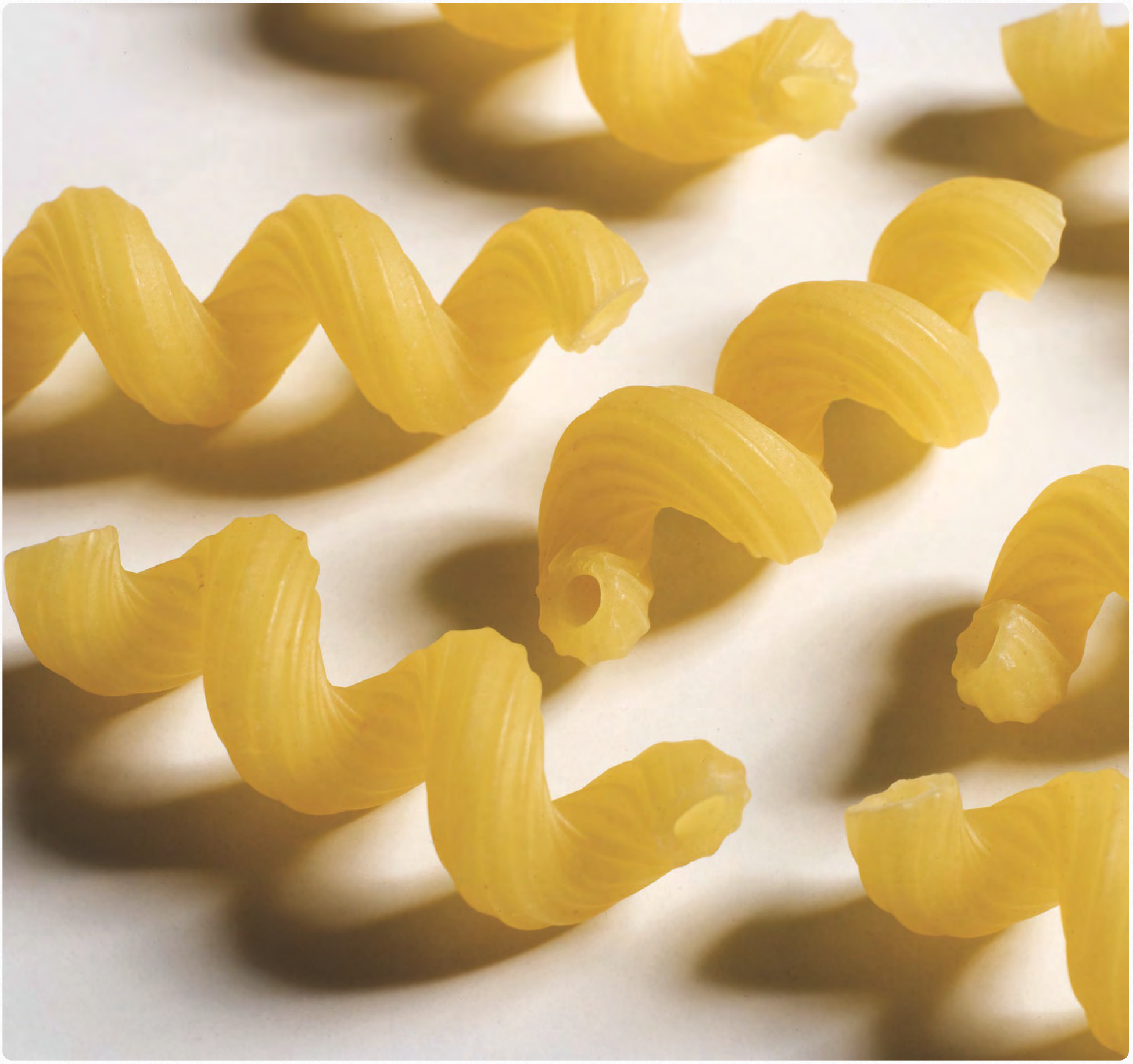
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9

Short news

Editorial staff



Riso Gallo launches its pasta line

Even rice is giving in to pasta. Riso Gallo, the company based in Robbio in the Province of Pavia (Italy), has launched a brand range in its 2017 catalog; a line of pasta made with wholemeal rice, corn and buckwheat. It is a gluten-free product aimed at celiacs or anyone who simply wishes to change their eating habits. The Riso Gallo 3-cereal pasta, the company explains, is rich in fiber, easy to digest, stays firm to the bite when cooked and can be combined with a large number of ingredients to create really tasty dishes. The product is available in 4 shapes: fusilli, penne, spaghetti and tortiglioni and can be bought at chemists' shops or in the Riso Gallo stores in 250-g packs.

Colussi, 10 milion for Agnesi pasta

After the closure of the historic pasta factory in Imperia (Italy), Agnesi starts again in Piedmont. The Colussi group - which took over Agnesi from Danone in 1999, has in fact invested no less than € 10 million to relaunch the Fossano plant in the Province of Cuneo (Italy) as a new pole for pasta production. New production lines will be installed and new software used while other investments will be dedicated to quality control. Thanks to these objectives and plant equipment, suitable for making all kinds of pasta, Agnesi will be able to guarantee excellent levels of production. The decision to move production to Fossano is linked to the impossibility of revamping the old plant to meet the demands of the national and international pasta market.

Paestum, terminated the excavation work financed by Amato

An important archaeological discovery, branded Amato. During the excavation work financed by the pasta manufacturer which began last October in Paestum (Italy), an unexpected monumental building was unearthed dating back to the second half of the sixth century BC, probably the home of a wealthy family of that time. The Salerno based company participated in the discovery by donating € 45,000 through two research bursaries won by the archaeologists, Francesca Luongo and Francesco Scelza. The work set out to expand studies into the life of the Greeks at the time when the temples were built. The archaeological park recorded excellent results in terms of visits in 2016: the number of visitors reached 355,401, an increase of 27% over the previous years figure, becoming the 17th most visited site in Italy.

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Felicetti, “a marvel” says the *New York Times*

“A 21st-century marvel”. This is how the Felicetti pasta factory is described by the New York Times. Why? Because of its decision to use only and exclusively wheat which is 100% grown in Italy. The American daily enthusiastically talks about the intuition which Riccardo Felicetti, chief executive of the company from Predazzo (Trento, Italy), had 16 years ago while contemplating grappa. “Once, there was grappa, period”, he explained to the newspaper; so, when they started producing different types of grappa, he considered applying the experience of this spirit to the world of pasta: instead of focusing on wheat mixes, it was better to concentrate on a monovarietal grain, promoting the territory, distinguishing oneself from the others and seeking a competitive advantage, he explained. So, in 2004 the Monograno (”single grain”) pasta line was created and 9 years later the company decided to use only 100% Italian wheat. This decision, said Mr. Felicetti, is not about quality – “We don’t necessarily consider Italian durum wheat to be the best” – but about rationalizing and simplifying control of the supply chain.

In the eyes of the American daily and the writer of the article, Nick Czap, this decision represents a “quiet revolution in the Italian pasta industry”. This above all because in most cases, Italian companies implement different choices. Nearly all Italian producers base their production on a mix of 70% Italian wheat and 30% imported from other countries. This has been the case since the start of the 1900s when they started importing from Russia and then over the decades they turned to North America and Australia. The reason lies in a combination of geographical reasons and linked to the high Italian demand (5 million tons against consumption of 4 million) which also explains why many manufacturers are against the decree which will force Italian pasta makers to indicate the country of wheat origin on product labels.

The decision to depend entirely on Italian crops brings a tear to the eyes of Americans. In Palo Alto, in California, a restaurant has already been opened which uses only pasta which is 100% Italian: it is called Italico and its menu includes Felicetti pasta. The “Pasta Flyer” chain belonging to Chef, Mark Ladner, will follow the same path as will the Rainbow Grocery in San Francisco. According to the New York Times, Felicettis' “move is paying off in flavor and sales, capitalizing on growing interest in expressions of terroir and feeding Italian pride”.



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Barilla wants to buy the English company Weetabix

Barilla is one of the companies interested in the acquisition of Weetabix, the breakfast cereal giant with 1800 employees which is currently in Chinese hands (Bright Food own 60% and Baring Private Equity 40%). According to the current owner, the company is not profitable enough, despite a € 410 million turnover in the last financial year alone. The English giant is tempting for many: as well as Barilla, other contenders in the € 1.8 billion acquisition include Nestlé, Pepsico (via its subsidiary, Quaker Oats), General Mills and the Turkish company, Pladis. According to the trade press, however, the odds seem to be in Barilla's favour. The multinational could strengthen its offer in breakfast products and open up a preferential entrance into the English, US and other markets around the world where the brand is already established (it sells in over 80 countries). But the price might be enough to encumber its financial statements for several years. The Weetabix family includes Weetabix, Alpen, Ready Brek, Weetos, Oatibix and Alpen Cereal Bars and the Weetabix brand is the best selling and most popular cereal in the UK, so much so that over the years it has become a real icon.

Tomasello bought by Tunisian entrepreneurs

The historical Tomasello pasta factory in Casteldaccia in the province of Palermo, Italy, is being bought out by Tunisian entrepreneurs. This is the news issued by the President of Sicily, Rosario Crocetta at the beginning of January. The pasta factory, one of the oldest on the island, was closed in 2014 and put in the hands of an official receiver. It employed about 50 people. “This is not the first time Tunisian entrepreneurs have sought out partners for investing in Sicily. We are taking about a Tunisia which is becoming dynamic and wants to invest in different sectors: agrifood, trade and tourism”, Mr. Crocetta said. The delegation which arrived on the island, headed by Mohsen Marzouk, has in fact also acquired two hotels, one in Palermo and one in Sciacca. The entrepreneurs' projects also include organizing a series of events in Palermo dedicated to Tunisian culture with artists, intellectuals and young people to talk about the African country and help combat prejudices. “When you collaborate with Tunisia, it opens up the Arabian market of Maghreb. The benefits for Tunisia, which enjoys an exclusive relationship with the EU, are many”, the Sicilian governor concluded.

Rummo, 2016 was the year of redemption

It kept its promise. When it was severely hit by a flood in October 2015, the Rummo pasta factory in Benevento (Italy) became the object of a campaign which was spontaneously set up on social networks with the hastag #SaveRuumo which stated “ Water has never made us soft”. And that's been the case. Just over a year later the company is back on its feet, and despite the fact that the durum wheat semolina pasta market saw a drop in consumption in 2016 (-1.3% in volume and -0.8% in value) it achieved excellent results. Rummo Lenta Lavorazione is the brand which recorded the most sustained growth (+49% in terms of volume and +48% in value) and in the 500 g segment it is the one which achieved the highest turnover. To celebrate, the pasta factory decided to launch a new pasta shape which will be distributed in January. This is the bronze drawn “maccheroncelli rigati” born from the tradition of the master pasta makers from the Campania region, which really keeps its bite when cooked. The history of the pasta factory goes back to 1846 when Antonio Rummo began producing pasta in Via Dei Mulini in Benevento, while the brand Rummo Lenta Lavorazione was created in 2005.

Di Martino, takes off at Bologna airport

Another pasta store with wings. Pastificio Di Martino has opened its second airport shop. After the Naples Capodichino airport, this time it is the Marconi airport in Bologna (Italy). The store is in the area accessible to all passengers and brings together an offer of over 100 pasta shapes, promoting the typical products of Gragnano tradition, all wrapped up in the signature blue paper. The products on offer include organic and wholemeal ranges, gift packs, company gadgets and artisanal ceramic plates. The project, which covers a space of 50 square meters, was designed by the architect, Marcello Panza. Now the company from Gragnano (Naples) aims to open other stores in the Rome and Venice airports and is waiting for the inauguration of Fabbrica Italiana Contadina of Eataly World which will open just outside Bologna in December 2017 and where the pasta factory will play a leading role.

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10

The Truth about Pasta. Pasta is good for the planet

International Pasta Organisation



The column written by the International Pasta Organization to combat false beliefs about pasta and reaffirm the importance of carbohydrates in a healthy and balanced diet.

Welcome to The Truth About Pasta. The column from the International Pasta Organization features many different topic – all pointing to The Truth About Pasta.

The truth is... pasta is healthy, sustainable, convenient, delicious, affordable, doesn't make you fat, and much, much more. Be sure to look for each new issue, with more topics and information. This month we are introducing a new TED-Ed lesson which explains why pasta is good for the planet.

Pasta has been nourishing friends and families for centuries, but science shows that this tasty and tenacious food is good for the earth as well. Delicious, satiating pasta meals deliver flavor and fullness, without disruptive environmental effects.

Growing wheat for pasta is gentle on the planet. Additionally, because pasta is commonly available dried, it can resist spoiling for long periods of time without additives or preservatives, which can help keep food out of landfills.

Policy makers across the world are embracing sustainable diets that are good for the environment.

As a rising number of nations move towards incorporating sustainability in their dietary guidelines, more and more people are realizing the environmental benefits of healthy pasta meals.

Because pasta has a much lower carbon footprint than other foods,





like meat, grain based-meals, like pasta, can help to leave a gentler impact on the earth.

Learn more in our new TED-Ed video.

After you view the video, you can test your knowledge with our TED-Ed Lesson.

See our other TED-Ed lessons below:

- *Pasta is Good For You*
- *Pasta Does Not Make You Fat*
- *Pasta Is Energy that Keeps You Fuller Longer*
- *Pasta is a Pillar of the Mediterranean Diet*.

The Truth About Pasta

Starting with the May 2015 issue of Pastaria, the International Pasta Organisation (IPO), a nonprofit association dedicated to promoting pasta consumption and awareness around the world by educating about the merits and benefits of pasta, introduced this new column called, “The Truth About Pasta”.

It is part of IPO’s communication programme, designed to combat the rise of unhealthy fad diets and change people’s perceptions of pasta by informing, educating and encouraging eating pasta as part of a healthy lifestyle.

For information;

www.pastaforall.org | f.ronca@internationalpasta.org






I.P.O.

International Pasta Organisation

INTERNATIONAL PASTA ORGANISATION (IPO)
Founded in Barcelona on World Pasta Day 2005
Formally constituted in Rome on World Pasta Day 2006






MISSION

The IPO is a nonprofit association dedicated to:

- Educating consumers, health professionals, journalists, government officials and others about the merits and benefits of pasta, its great taste, its healthfulness and its simple convenience.
- Increasing consumption of pasta around the world.

ACTIVITIES

- Organizes research, promotional and educational programs and events about pasta, such as World Pasta Day and World Pasta Congress.

WORLD PASTA DAY
25 October

- Collects, organises and distributes nutritional, statistical and other information about pasta.
- With the support of a Scientific Advisory Committee, currently formed by a panel of 25 experts from 17 different countries, educates consumers and others through the media, conferences, research, publications, workshops, and other related activities.

MEMBERSHIP

The International Pasta Organisation now has 25 members (including two European Federations, UNAFPA and SEMOULIERS) representing 18 countries (Argentina, Belgium, Brazil, Canada, Chile, Colombia, Costa Rica, France, Guatemala, Iran, Italy, Mexico, Portugal, Spain, Turkey, United States, Uruguay and Venezuela).

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11

Non punishability of food sector crimes due to the minor nature of the offence: first applications

Lino Vicini



We are presenting two concrete examples of the application, to the food sector, of the legal instrument of non punishability due to the minor nature of the offence, provided for by article 131 bis of the Criminal Code, introduced by the Italian legislature with Legislative Decree No. 28 of 16 March 2015.

As we all know, the law is composed of a series of rules that govern civil life.
The power of the law manifests itself through the penalties inflicted on those who fail to follow the aforementioned rules.
By definition, therefore, the rules of law, in contrast with moral rules, are distinguished by the presence of penalties imposed, in tangible form, on those who violate them, by means of enforceable instruments.
Modern legal systems generally envisage various types of penalties that vary according to the gravity of the behaviour they are designed to curb.
More serious modes of behaviour that violate the rules imposed to protect the most important assets, such as for example, the individual and collective lives of people, personal safety and public security, are punished by criminal law.
Food sector law also includes a number of different penalties.
For example, Legislative Decree No. 190 of 5 April 2006, which provides for disciplinary measures for the violation of articles 18 and 19 of Regulation (EC) No. 178/2002.
Thus, art. 2 of the abovementioned Legislative Decree specifically stipulates that “food sector operators... who fail to fulfil the obligations laid down in art. 18 of Regulation (EC) 178 of 2002 (which, we remind readers, imposes traceability on all phases of the production, processing and distribution of foodstuffs) are obliged to pay an administrative fine ranging from € 750.00 to € 4000.00”.
For more serious behaviour, on the other hand, there are criminal penalties contained in the code of criminal procedure and in numerous special laws.
Over the past fifty years, there has been an abnormal increase in incriminatory legislation, and this phenomenon has given rise to various problems, since the system is not able to punish all the offences reported; recently, the legislature has tended not to enforce penalties to punish all the various forms of illegal behaviour.
Instead, it has chosen to provide for the substitution, where possible, of the criminal consequences with penalties of a different kind, in the majority of cases, administrative.
This strategy is called “decriminalisation” and involves the conversion of the crimes into administrative offences.

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It is important to remember how in 1999, the Italian legislature changed almost all types of violations provided for in the food sector into administrative offences.
This measure was justified by the principle according to which the criminal penalty should only be used in cases in which it is not possible to use other disciplinary measures.
We are referring in this case to subsidiarity of criminal law or *estrema ratio* of the punishment strategy of the criminal court.
The ancient Romans had already understood the need for this and had established the principle with the famous expression "*de minimis non curat Praetor*" which, translated, means that the Praetor (magistrate) does not deal with minor problems (literally: the Praetor does not deal with tiny things).
In an attempt to improve the perennial crisis situation of criminal law in Italy, along with decriminalisation, over the past few years the legislature has been passing new laws which allow the courts not to apply the criminal penalties in cases deemed to be of minor importance and impact.
In some cases, the legal system waives the punishment of the perpetrator of an illegal act due to the inconsequentiality of the action, i.e. the minor nature of the offence.
This assessment is passed on to the criminal court which assesses the facts and must decide, in practical terms, whether the incident brought to its attention deserves to be punished or not.
Legislative Decree No. 28 of 16 March 2015 introduced article 131 bis in the code of criminal procedure in force[1].
The scope of application of this instrument is identified with reference to the decreed penalties provided for by the incriminatory legislation.
It must be a crime for which a custodial sentence not exceeding a maximum of five years is contemplated.
To this end, the crimes falling into this category are, for example, the trading of harmful food substances (art. 444 of the Criminal Code) which envisages a conviction of six months to three years imprisonment, commercial fraud (art. 515 of the Criminal Code) which is punished by imprisonment of up to two years or by a fine of up to € 2065.00, the sale of not-genuine food substances as genuine (art. 516 of the Criminal Code), the sale of industrial products with mendacious signs (art. 517 of the Criminal Code), the falsification of geographic indications or denominations of origin of agricultural products (art. 517 *quater* of the Criminal Code) as well as the violations provided for under the various letters of art. 5 of Law No. 283 of 1962.
In order to verify the importance of the event, the Court must observe whether, in

the first place, the offence “due to the type of conduct and the inconsequentiality of the damage or the danger evaluated on the basis of the indicators provided for by art. 133 of the Criminal Code is of a minor nature”.
The gravity of the offence must be of a level that does not justify recourse to the criminal penalty.
In a nutshell, the court must evaluate in practical terms whether the incident deserves punishment or not.
In addition to the minor nature of the offence, for the purposes of excluding punishability, art. 131 bis of the Criminal Code requires the behaviour not to be habitual. Non-punishability is precluded also in cases of the commission of several crimes of the same type, even if each offence, considered in isolation, is of a minor nature.
With sentence no. 13.681 of 25 February 2016, the United Chambers of the Supreme Court of Cassation ruled that “art. 131 bis of the Criminal Code applies to all types of offences, in accordance with the conditions laid down and in compliance with the limits set by the regulation itself”.
Also the relevant case-law has had the opportunity to apply the new legal instrument provided for by art. 131 bis of the Criminal Code.

Two examples of practical applications of the new legal instrument

This section is dedicated to the examination of two real life cases selected through sampling and handled in Court, with a description of the said court’s final ruling.
In the first case, the monocratic Court of Rieti tackled the case of a dealer who had put up for sale a number of vacuum-packed hams, bearing an image of the Italian flag, when it had been proven that the raw material (pork haunches) had been produced in Northern Europe where the pigs were born, bred and finally slaughtered.
The investigating agents of the Italian State Forestry Corps had therefore reported the man to the Judicial Authorities, assuming that he had breached art. 517 of the Criminal Code, i.e. the sale of industrial products with mendacious signs.
After having opened the debate and before hearing the witnesses, on the basis of the documents contained in the Court file, isolated acts relating to the seizure of the products, the Judge ruled to acquit the accused of the alleged offence pursuant to art. 131 bis of the Criminal Code, due to the minor nature of the said offence.
In the reasons given for the ruling, it is stated, verbatim, “taking into consideration the effective conduct of the accused, with

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particular reference to the minor importance of the offence, assessed on the basis of the small number of products put on sale in violation of art. 517 of the Criminal Code and the personality of the offender, who had no previous convictions, a circumstance that points to the occasional nature of the offence, the grounds exist for the application of the case of non-punishability provided for by art. 131 bis of the Criminal Code".

In this matter, a number of singular elements are worthy of note.

In the first place, the judge considers the offence proven notwithstanding the fact that the underlying legal question is far from self-evident, added to the fact that serious doubts emerge regarding the existence of all of the elements of the illegal action.

In actual fact, although the products were derived from pigs born, bred and slaughtered abroad (Germany and the Netherlands), they had been processed on national territory by an Italian pork butcher and for this reason they were marked with an image depicting the Italian flag.

On the basis of Community regulations[2] a product must be considered as having been produced in Country A if, starting with a raw material coming from Country B, the essential processing takes place in the first Country.

Thus, for example, if from raw material – wheat grown and harvested in Canada or in Ukraine – the manufacturer produces pasta in Italy, the finished food product must be considered, to all effects and purposes, Italian, on the basis of the processing regulation.

On this point the Italian regulations[3] differ from those of the European community, interpreting the concept of origin in a different way.

In the light of the primacy of European law over national law, however, the conflict should be resolved in favour of European law; indeed, in the event of a conflict between provisions, each judge is obliged to not to apply the national law, but to give precedence to the Community law, which prevails.

In the light of these simple considerations, the judge should, therefore, have raised the doubt as to whether the offence might have fallen into the category of this type of case.

At any rate, he should not have considered the offence proven "beyond any reasonable doubt" as stated by art. 533 of the code of criminal procedure, given the existence of numerous critical factors in connection with the responsibility of the defendant.

Moreover, the simple material fact ascertained by the officers of the Italian State

Forestry Corp was not sufficient on its own to establish whether the food products would or would not have misled the majority of purchasers as regards their Italian origin.
In addition to the above, there is also another critical aspect concerning the procedure followed.
As a matter of fact, the judge does not take into consideration the request of the defence lawyer, who was expressly against the application of the legal instrument provided for by art. 131 bis of the code of criminal procedure, requesting the opening of the debate in order to obtain a ruling of full acquittal from the alleged offence.
The defence's request should have been considered and evaluated attentively, also with reference to the substantial effects of acquittal in accordance with art. 131 bis of the Criminal Code.
In this sense, he also puts forward another logical argument obtainable from another provision of the code of criminal procedure.
There is, in fact, a provision for the specific case in which the request for closure of a case due to the minor nature of the offence can be made by the Public Prosecutor in the course of the preliminary investigations.
Art. 411 of the code of criminal procedure effectively states that the Public Prosecutor must advise the person subjected to investigation and the injured party of this fact, specifying that they have ten days' time in which to examine the acts and present an objection in which they indicate, on pain of inadmissibility, the reasons why they disagree with the request.
In this event, the judge in charge of the preliminary investigations decides after having heard the parties and if he accepts the request, proceeds with the sentence.
In the case held at the Court of Rieti we do not know whether the parties were granted the right to be heard on the issue and it would appear that the monocratic judge decided to apply art. 131 bis of the Criminal Code automatically, without giving the parties involved the possibility to raise an objection.
It is clear in this case that the dealer's only possibility of being fully acquitted from the charges ascribed to him would be to appeal against the ruling of the judge in question.
And in fact, resolving the matter with a ruling to apply art. 131 of the Criminal Code has various consequences.
We remind the reader that art. 651 bis of the code of criminal procedure – the purpose of which is to regulate the enforceability of the ruling of acquittal due to the minor nature of the offence in civil or administrative proceedings for damages – states

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that an irrevocable judgement of acquittal has the legal force of a judicial decision as regards the ascertainment of the existence of the offence, its criminal illegality and as regards the declaration that the accused has committed it, in civil or administrative proceedings for the repayment and compensation of the damage inflicted upon the acquitted party and the civil liability which may have been mentioned or enacted in the criminal proceedings.

It is also important not to forget, still from a substantive legal standpoint for the accused, the law that imposes the entering in the criminal records even of provisions that have declared non-punishability pursuant to art. 131 bis of the Criminal Code.

From this standpoint in legal literature the doubt was correctly raised as to whether the application of the legal instrument in question was compatible or otherwise with the constitutional principle referred to in art. 27 which establishes that “the accused is not considered guilty until final judgement has been passed”, and in art. 6, paragraph 2 of the European Convention on Human Rights (ECHR), according to which “every person accused of a crime is deemed innocent until his or her guilt is established under law”[4].

The exclusion of punishability due to the minor nature of an offence does not, therefore, constitute an acquittal; rather, on the contrary, it establishes, definitively, that the crime has been committed by the person declared non-punishable.

For this reason, notwithstanding the acquittal, the accused may still be subjected to the criminal effects, in the broad sense of the term, provided for by the law unfavourable to him or her.

So just think of the reputational damage of a formula of this type, as a result of which the accused is not acquitted pursuant to art. 530 of the code of criminal procedure because “there was no case to answer, because he did not commit the offence, because the act does not constitute a crime or it is not considered a crime by the law” but with a different formula “because the act is not punishable because it is of a minor nature pursuant to art. 131 bis of the Criminal Code.”

In conclusion and for various reasons, there are well-founded doubts that an acquittal based on art. 131 bis of the Criminal Code is in contrast with art. 6 paragraph 2 of the European Convention on Human Rights, as interpreted by the Court of Strasbourg.

In the second matter examined, the Criminal Court of Parma dealt with a case in which the representative of a restaurant had been committed for trial for having kept food products destined for customers’ consumption in a poor state of preser-

vation, inasmuch as they were packaged in non-food grade bags devoid of indications and labelling, frozen inside a chest freezer with a rusty lid and covered in ice incrustations, indicating non-compliance with the cold chain and poor general storage conditions.
In the course of the proceedings both the witnesses and the operators of the Local Health Authorities were duly heard, and substantially confirmed the facts contained in the information notice.
The judge considered the crime proven, maintaining that it fell exactly within the scope of the offence referred to in art. 5 letter b) punished by art. 6 of Law no. 283 of 30 April, 1962.
In the course of the debate the defence lawyer asked the Court for acquittal due to lack of the subjective element (blame) of the crime inasmuch as there was a person assigned to the preservation of the products (without, however, a formal written mandate) and alternatively asked the judge to apply art. 131 bis of the Criminal Code for the minor nature of the offence verified.
The Court sentenced the restaurant owner to a fine of 3000.00 euro plus the costs of the proceedings.
In the ruling the reason given for excluding the possibility of the minor nature of the offence is interesting.

As a matter of fact, the crime referred to in art. 5 letter d) of Law 283 of 1962 according to the judge “is a dangerous offence in relation to food products designed for human consumption and cannot be considered of minor importance, due to the obvious detrimental consequences on the health of those who, totally unaware, are subjected to it, trusting in the goodness and genuineness of the foodstuffs being served”.
Also in this case, the reasoning on that point gives rise to a number of critical issues, both in fact and in law. As a matter of fact, from the mere circumstance that an (alleged) dangerous offence exists, it cannot be automatically deduced that the offence is not minor.
The question must, in fact, be verified and evaluated, and so the Judge must motivate his confidence in the ruling.
In the actual case study under examination, this aspect appears sketchy, there being no proof of possible damage to the health of consumers recorded in the acts.
Now if it is an accepted fact that the offence referred to in letter b) of art. 5 includes a dangerous offence inasmuch as “it is not necessary to verify the existence of tangible damage to health or a tangible deterioration in the product”, the judge should, however verify in practical terms “that the preservation methods are actually



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responsible for creating this danger" (on this point cf. Criminal Court of Cassation section III, of 13 April 2007, no.15,049 hearing of 9 January 2007).
In the specific case, this evidence is totally lacking.
Moreover the legal assessment of danger must be made with reference to the state of the product and not to the methods of preservation (on this point cf. Criminal Court of Cassation section III, of 20 January 1997, no.4047).
Additionally, in relation to the existence of art. 5 letter b) "it has always been requested that the offence be contextualised in a factual situation which can, on the basis of an irrebuttable assumption, determine the damage to the protected interest. The principle of typicality requires, especially for allegedly dangerous crimes, a particularly strict interpretation, with a view to avoiding an inadmissible extension of the type of criminal offence, so the accessory conduct to the crime must correspond exactly in the situation assumed as a parameter for the practical evaluation of the transgression" (Criminal Court of Cassation section IV, 3 March 1993, no.1973 Thirez).
The meaning of maximum must be explained in this sense: the fact that the legislature presumes that food products in a poor state of preservation are, on the basis of the laws of experience, dangerous for consumers does not exempt the Judge from effectively verifying whether the product was in fact kept in poor conditions of preservation. Moreover, in the case in point, the poor conditions of preservation verified are not sufficient on their own to prove that there is an actual risk of alteration of the products with sure consequences to the detriment of potential consumers, as it would appear viceversa from the reasoning of the Judge.
This assessment and the consequent specific reason in the ruling of the monocratic Court on the point is insufficient, since the reason was not sufficiently expressed by the Judge and the formula used to exclude the application of the minor nature of the offence compared to the case in point judged was formulated in a superficial manner.

Notes

1. Art. 131 bis of the Criminal Code. In crimes for which a custodial sentence not exceeding a maximum of five years is contemplated, or a fine, alone or combined with the aforementioned penalty, punishability is excluded when, due to the type of conduct and the inconsequentiality of the damage or danger, evaluated pursuant to article 133, first paragraph, the offence is of a minor nature and the behaviour is not habitual.
   The offence cannot be considered to be of a minor nature, pursuant to the first paragraph, if its author has acted for abject or futile reasons, or with cruelty, also against animals, or if he has in-

flicted abuse or taken advantage of the victim's inability to defend himself, also due to the age of the same or when the conduct has brought about, or indirectly led to, – as undesired consequences – the death or serious injury of a person. The behaviour is habitual in cases in which the author has been declared a habitual delinquent, professionally or by tendency or when he has committed several crimes of the same type, even if each offence, considered in isolation, is of a minor nature, as well as the case in which crime is the result of multiple, habitual and repeated behaviour. For the purpose of determining the custodial sentence provided for in the first paragraph, the circumstances are not taken into account, with the exception of those for which the law establishes a punishment of a different kind from the standard one for the offence and from those having a special effect.
In the latter case, for the purposes of the application of the first paragraph the balancing judgement of the circumstances referred to in article 69 is not taken into consideration. The provision of the first paragraph is applied even when the law makes provision for the minor nature of the damage or danger as a mitigating circumstance.

2. Article 36, paragraph 2 of Regulation (EEC) no. 450/2008, establishing the Community Customs Code (Customs Code) states: "Goods the production of which involved more than one country or territory shall be deemed to originate in the country or territory where they underwent their last substantial transformation."
3. Art. 4 paragraph 49 of Law no. 350 of 24 December 2003. Importing and exporting for the purposes of marketing, or the marketing of products bearing false or misleading indications of provenance constitutes a crime and is punished pursuant to article 517 of the Criminal Code. The affixing of the "Made in Italy" stamp on products and merchandise not originating in Italy pursuant to the European legislation on origin; even if the origin and foreign provenance of the products or the goods is indicated, the use of signs, figures or anything else that could induce the consumer to believe that the product or the goods are of Italian origin constitutes a misleading indication. The crimes are committed from the moment of the presentation of the products or goods at the customs for release for consumption or for free circulation, and up until their sale in the retail outlets. The misleading indication of the goods may be decriminalized on an administrative level through the removal by the offender at its own expense of the signs or figures or whatever else could induce the public to believe that the product is of Italian origin. The false indication of the origin or provenance of products or goods may be decriminalised on an administrative level by affixing the exact indication of origin or removing the "Made in Italy" stamp.
"For food products, by 'effective origin' is intended the place where the agricultural raw materials used in the production and preparation of the products were grown or bred and the place in which the substantial transformation took place".
4. It is important to remember that the European Convention on Human Rights (ECHR) sets obligations both for the legislature and for the Italian judge. On the basis of art. 117 of the Constitution, the national legislature must exercise its power in compliance not only with the Italian Constitution and the restraints deriving from the Community legal system, but also in compliance with international obligations. The Judge in turn has the duty to interpret the laws, also in the area of criminal law in a manner that conforms to the letter and the rationale of the international obligations that bind the Italian State.

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12

Durum wheat, go-slow for sowing and harvesting in 2017

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But the world supply (50 million tons) remains high and in surplus compared with consumption (39 million), due to the very high level of stocks (11 million tons).

The abrupt drop in prices on international markets and the prospect of abundant stocks at the end of the 2016-17 harvest had a strong influence on durum wheat sowing in Canada, the world's no. 1 producer and exporter.

The forecasts published in its February Outlook by the Ministry of Agriculture in Ottawa foresee a 20% reduction in cultivated areas with a sharp loss of a fifth of the acres sown in 2016.

Even greater the drop in harvests, predicted by analysts to be a full 29% less, and expectations are that this summer's crop will not exceed 5.5 million tons.

These estimates, explain government experts, are based on the expectation that mean yields per unit will return to normal levels following the record attained in the last threshing. Supply will remain high, however, in anticipation of a very high level of stocks which are nearly sufficient to offset the major drop in production expected this year.

This new harvests, together with stocks from previous harvests, will bring the supply of Canadian durum wheat to 8.3 million tons at the start of the 2017-18 season, a drop in quantity of 6%.

There remains the fact of the medium/low quality of the wheat currently in storage that could provide some additional space in silos from now until the end of the harvest, due to the need to exhaust products with "limited duration".

The qualitative aspect, with the expectation of better standards starting this summer, could make it possible for Canada to increase its exports by 7% to 4.8 million tons. This while stocks should drop by the end of the season to 2.2 million tons, resulting in a decrease of 21% compared with initial levels.

Globally—again, according to Canadian analysts—a fairly modest drop in the durum wheat harvest is likely, with 39 million tons forecast on a worldwide scale, which would shave 1.7 million off 2016-17 production figure.

However, this will not impact supply availability which the decidedly high stocks will maintain at a significant level. An amount of 50 million tons, up half a million and more than sufficient to cover demand which, between

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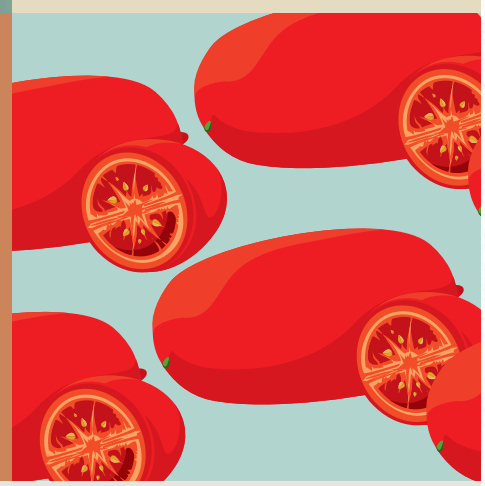
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Table 1 CANADA, DURUM WHEAT FORECASTS (000S TONS)

	2015/16	2016/17	2017/18 (forecast)	Variation 2017/16
Production	5,389	7,762	5,500	-29%
Imports	13	10	10	-
Total available	6,367	8,873	8,310	-6%
Exports	4,542	4,500	4,800	7%
Internal use	724	1,573	1,310	-17%
Stocks	1,101	2,800	2,200	-21%

Source: Agriculture and Agri-Food Canada

manufacturing and feed requirements, should be around 39 million tons (+600 thousand), leaving stocks unchanged at a level of 11 million tons.

Fewer acres in cultivation and a drop in output also in the US, given early reports, with a potential decrease in the American harvest of 2.5 million tons, 330,000 lower than in 2016.

Also in Italy (the no. 2 producer worldwide and no.1 in Europe) the sharp reversal in prices has discouraged farmers who this year, according to ISTAT forecasts, decreased sown areas of durum wheat by over 7%.

This cut in investment, which emerged from the annual survey of sowing plans, is the result of a more general drop seen in all geographical areas. In southern areas (Apulia and Sicily in particular), where the cultivation of durum wheat is more widespread, a loss of 7.4% in sown acres compared with 2016 is expected (–5.4% in central Italy). A decrease can also be seen in the North, with a reduction of over 11% in the eastern belt, where the Emilia Romagna region is key.

Similarly, British analysts from the International Grains Council confirm in their February forecast the trend towards a reduction in the world areas in which durum wheat is grown. In line with Canadian estimates, the view of experts across the Channel is not for a drastic fall in production, but just some slightly-lower adjustments of harvests compared with 2016, also given the expected improvement in yields in North Africa, thanks to improved weather following the terrible conditions experienced this past year.

However, in the European Union, the situation is not positive. This year, the cultivated area for durum wheat is expected to be 6% less than in 2016, also as a result of the freezing temperatures in January which



hit heavily the Balkans, northern Europe and the central-southern regions of Italy. Due to the ample stocks and availability expected to continue into 2017-18, prices in international markets remain significantly low with Canadian durum wheat (No. 1 CWAD) traded at US$260 FOB at the port of St. Lawrence (–$45 in one month) and with the French quoted at $233 FOB at the port of La Pallice.

In Italy, for the Foggia reference market, best-quality durum wheat closed in February at a maximum of € 208 per ton ex-warehouse, down approximately 5% on a monthly basis. Compared with February 2016, there was a drop of over 18%, in absolute value terms, nearly € 50 per ton less.

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