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The first **digital** professional magazine on the pasta sector and supply chain activities. Completely **free**.

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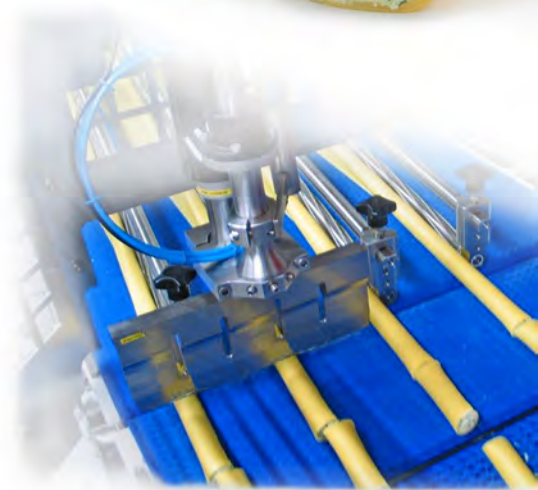
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regarding the loading/
unloading register



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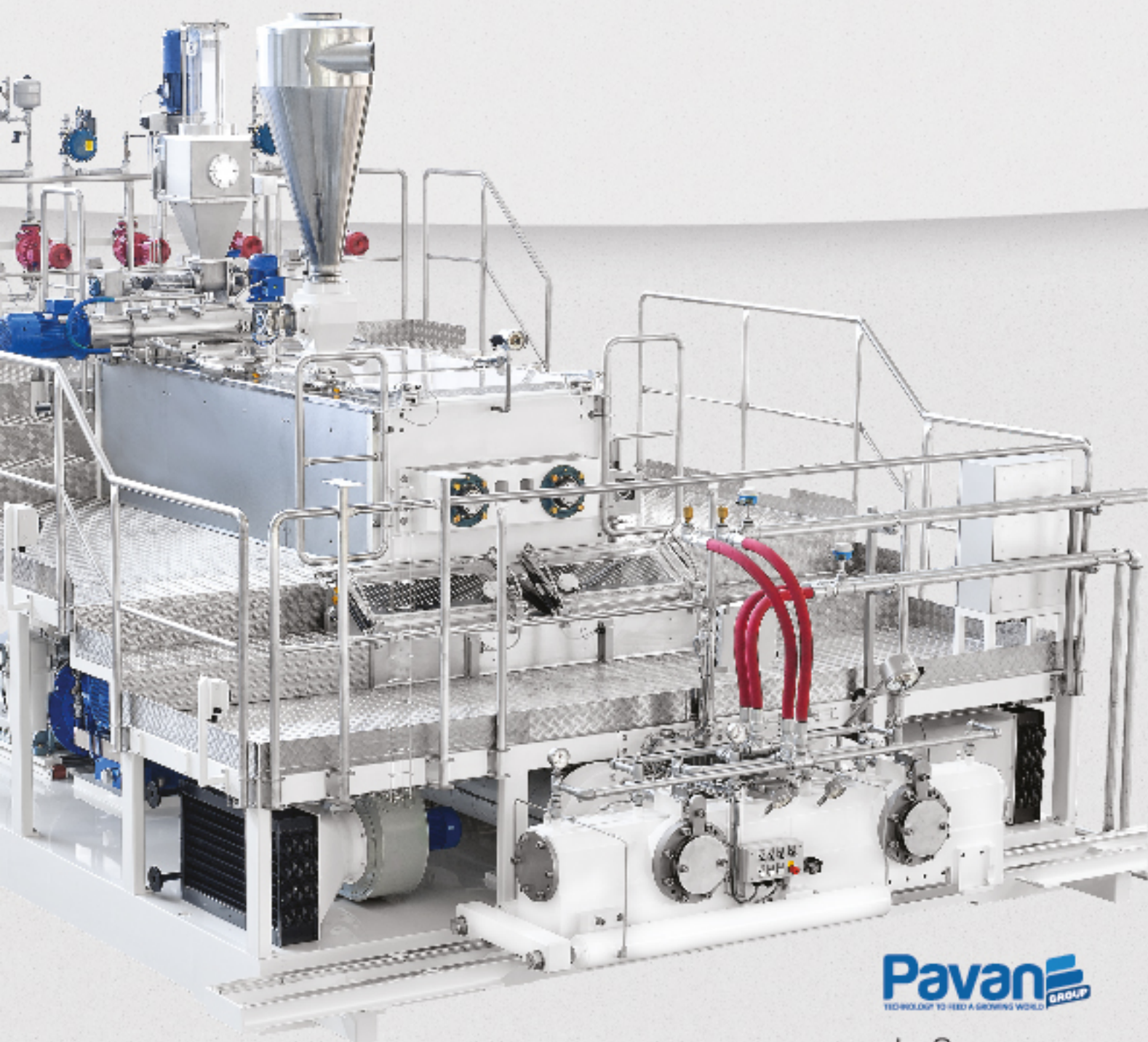
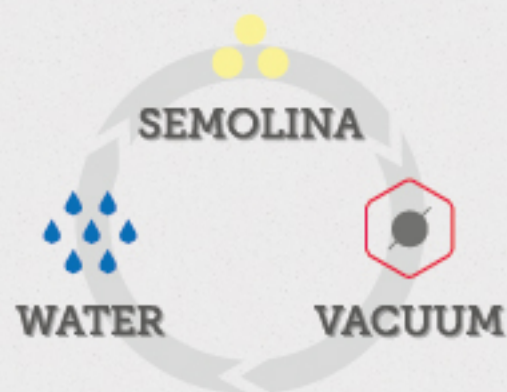
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pasta, consumption in europe



Pasta sales in the modern distribution channel of Europe's top markets: Germany, France, Italy, The Netherlands, United Kingdom and Spain.



The growing role of private labels (distributor brands) and increased pressure from promotional offers have slowed, but not halted, the drop in pasta sales in Europe.

The most recent IRI statistics of retail sales in the modern distribution channel (hyper and supermarkets, mini-markets and discount outlets), reveal in leading Old World markets, comprised of six countries (France, Germany, Italy, Spain, The Netherlands and United Kingdom) a generally negative trend in pasta sales. This within an overall context showing a positive trend for long shelf life packaged foods which include (in addition to pasta), rice, dairy products, canned goods, baked goods, cereals, sauces and condiments, snacks and ready meals.

For the group of countries mentioned above, in terms of the macro-category of long shelf life products, IRI notes an increase in end-consumer sales of 2.3% for the year ending September 2013. On the other hand, the same comparison with the twelve previous months shows a decrease of 0.6% for pasta, with sales in the channels examined of 3.8 billion euros, corresponding to 3.9% of the total sales for long shelf life products, just under 99 billion euros for the group of top European markets.

Although negative, the overall trend indicates only a fractional drop for pasta which, in absolute terms, over the year decreased just under 23 million euros.

A trend that mirrors that seen in other products, such as ready meals, canned meats or canned vegetable products, but which registered a greater drop in revenues. This was in net contrast with retail revenues for baked goods, canned fish and snacks which rose sharply.

Specifically, there was no major change in France where annual pasta sales in the modern distribution channel, to the end of last September, totaled 723 million euros. Of special note, the slight drop in French distribution channels of the impact of private labels and promotional sales. While retail prices bolstered revenues which only recently (the last 2-3 months) have registered a decidedly lower trend, as in the rest of Europe.

Of note, the significant about-face in the French market of packaged pasta sales, a sector which, according to IRI data, showed a drop in volume of 18.6%.

A market that is also slowing in Italy where pasta sales in general showed an annual drop of 2.1%, falling in large retail and discount outlets under the 1.7 billion euro threshold. A tendency largely explained by the negative trend in sales in northern Italy. According to the report, in absolute value, the drop seen in the modern distribution channel resulted in 37 million euros less in revenues.

In relative terms, while in France pasta represents just 3.9% of sales of all packaged foods with a long shelf life, in Italy it represents 9.1%, with pasta in third place behind snacks and baked goods.

In Germany, the level of macaroni and spaghetti within the long shelf life market is 3.4%. The balance for the year just ended September 2013 was negative, registering a drop in pasta sales of 0.8% to just





barely 820 million euros. A relatively modest drop which would seem to reflect the greater importance of discount stores in retail sales and strengthening of distributor labels which channeled purchases towards products with a lower unit price.

Among the six countries examined, only The Netherlands show a positive trend in the modern distribution channel, with a growth of nearly 8% on an annual basis. It is a relatively small market, with retail revenues of about 115 million euros (2.5% of all long shelf life goods), but in which pasta holds third place in terms of growth after sauces and baked goods.

The IRI study does not include detailed figures for the Spanish market, which is worth about 135 million euros. In the United Kingdom, on the other hand, there was a drop in pasta sales of 1.5% on an annual basis. A market of just under 352 million euros, in which pasta plays a marginal role, just 1.7% of sales of long shelf life products within the UK.

Of note, on the basis of the family panel of ISMEA/GFK-Eurisko, the sales of hard wheat pasta in Italy in



the first 11 months of 2013 showed a drop in volume of 0.9% which, in monetary terms, translated into a drop of around 8% (compared with the same period in 2012). A figure that can be explained by the higher level of promotional sales, the greater presence of discount outlets and shift in purchases to low-cost products.

Even more marked was the drop in rice sales, with reductions of 3.9% in volume and over 10% in value terms. A heavy about-face also for ready meals which, with a 3.4% drop in volume sales, registered a decrease of nearly 8% in revenues.

Modern distribution channel pasta sales in Europe (in millions of €)

	2012	2013	Variation
Top Markets in Europe	3,860.7	3,838.0	-0.6%
by country:			
France	n.d.	723,0	-
Germany	825.8	819.5	-0.8%
Italy	1.730.0	1.693.0	-2.1%
The Netherlands	107.2	115.4	7.6%
United Kingdom	357.1	351.6	-1.5%
Spain	n.d.	135.5	-
<i>Source: IRI Retail, year ending September 2013</i>			

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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.
- 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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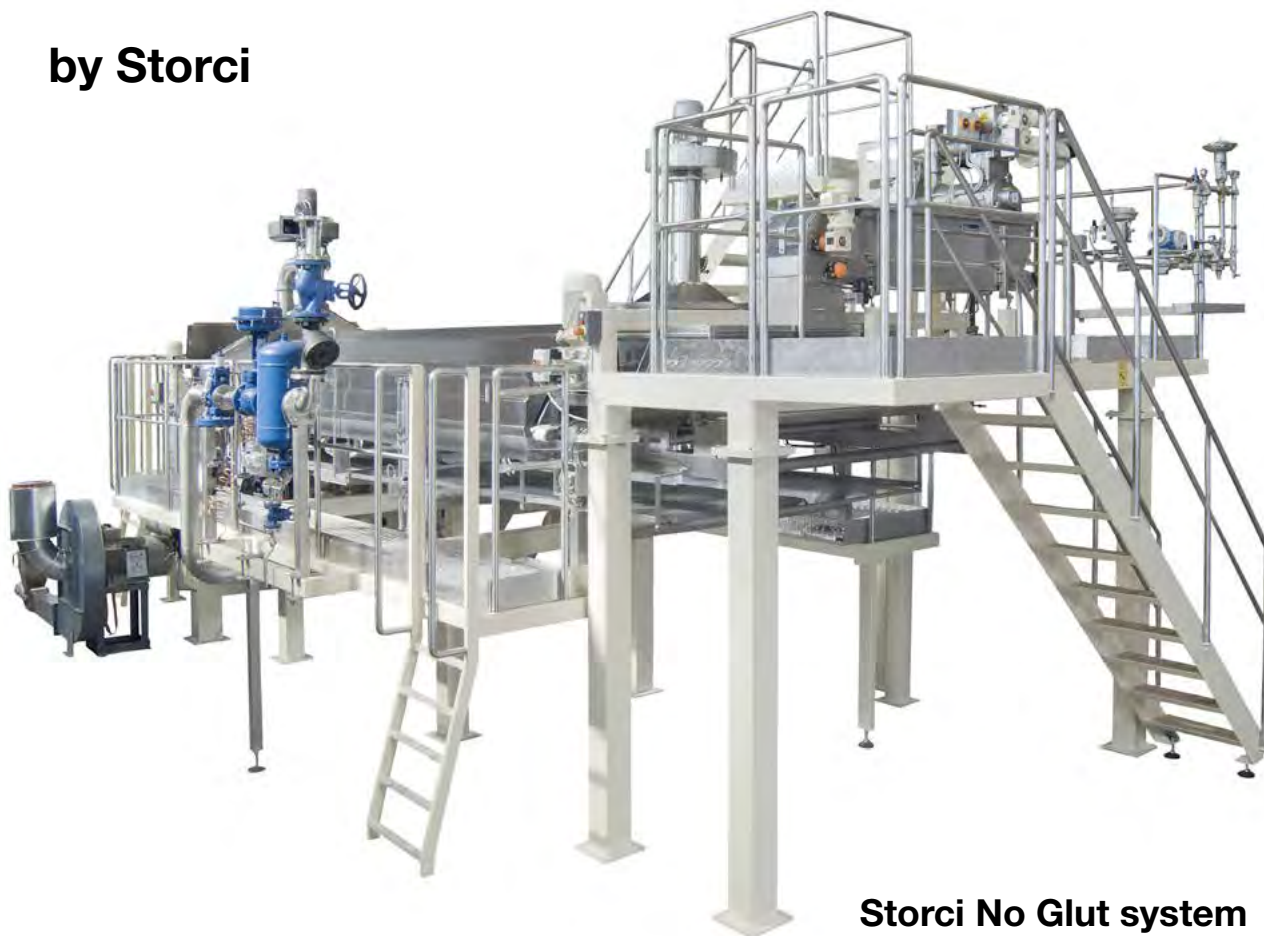


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storci **gluten-free** pasta lines

by Storci

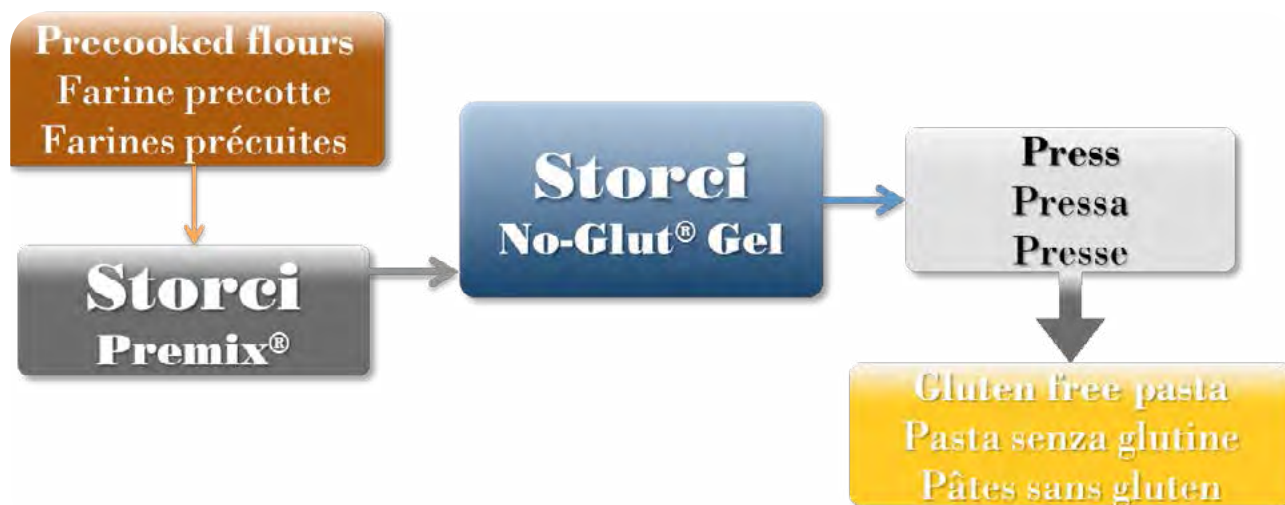


Storci No Glut system

No-Glut, a synonym for 'gluten-free': Storci is continuing to innovate in a modern sector which is changing all the time. The aim of manufacturers is to come as close as they can to the quality and taste of durum wheat pasta, whereas consumers are looking to find a pasta they can really enjoy.

Celiacs and health fanatics are the main consumer groups and they tend to be much more selective in choosing their reference brands than the average buyer.





Gluten intolerance is caused by a protein complex which causes intestinal problems. It is found primarily in wheat, barley, rye, oats, spelt, emmer wheat, Kamut and triticale. Currently, also thanks to accurate diagnoses, a moderate increase in the number of celiacs is estimated and this is pushing the industry towards product differentiation.

The need to provide valid substitute products has created a market, which up until a few years ago could only be defined as "niche".

Technologies

High energy consumption, difficulties in cleaning and problems in managing the degree of gelatinization in the dough are the main defects encountered in traditional systems. The raw maize and rice flours, or the different starch mixes not to mention the gluten-free flours are usually steam treated in tanks or by heating the dough with a lined extrusion screw.

Alternatives: Storci No-Glut Raw and No-Glut Gel

Two simple and effective solutions, either complete in themselves or designed for integration on existing lines built by Storci or other manufacturers for producing high quality gluten-free pasta. Designed for dry, gluten-free short-cut, long-cut, nested pasta and lasagna, these systems can also be used to produce regular pasta*.

Storci No-Glut Raw is specifically designed to produce gluten-free pasta using raw flours such as maize, rice and potato flours, starches and various mixes: the pasta factory no longer depends on the mill. There is no cooking in a tank, the dough is precooked on a belt which makes it possible to obtain the best quality pasta without restrictions. The dough doesn't clump together, heat and moisture are evenly distributed and the risk of some parts remaining raw is avoided: this is the main cause of the white specks which spoil the appearance of the pasta. Specific dosing systems and other





accessory units ensure that the precooked dough has an excellent uniform and high quality consistency. What are the main advantages?

- High level of control over the degree of gelatinization;
- more uniform heat treatment and optimum energy efficiency;
- total control of heat treatment times to suit different flours;
- easy to clean and no product stagnation.

It can be integrated on new or existing lines built by other manufacturers making it possible to switch from the production of regular pasta to excellent gluten-free pasta (subject to assessment of the construction and wear conditions for used lines).

The Storci No-Glut Gel system is specifically designed for use with precooked flours: with the accessories kit, existing Storci lines can be turned over to the production of gluten-free pasta, with maximum adaptability to precooked flour mixes and availability of integrable doses. Designed for handling raw flours with the No-Glut Raw system.

The Storci lines which can be enhanced by the No-Glut Raw systems for producing gluten-free pasta are:

- Omnia line for producing all shapes of pasta on the same line (circular head configuration only);
- short-cut pasta line for producing all shapes of short-cut pasta, nested pasta and lasagna;
- long-cut pasta line for producing all long-cut shapes of pasta with maximum automation (circular head configuration only);
- laminated and die shaped nested pasta and lasagna line.

Test e demo

The Storci research and development laboratory, officially recognized as a Highly-Qualified Laboratory for Industrial Research by the Italian Ministry of Higher Education and Research (Ministero dell'Università e della Ricerca – MIUR) is at the disposal



of customers who wish to test flours, mixes and machineries and select the solution which best suits their production processes.

Notes

The No-Glut system is only suitable for standard pasta shapes, consequently the production of special shapes with fusilli bucati lunghi (long hollow fusilli), candele (long hollow pasta), paccheri (large pasta tubes) and other similar shapes is excluded. Production capacities are different to those obtained using durum wheat semolina.

(*) Contamination of gluten-free pasta with flours and pasta containing gluten excludes the production of certified pasta for consumers affected by celiac disease.

for further information

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pastificio dei campi: spaghetti and rigatoni in a social-based sauce

Bringing tradition online to give it enhanced importance. This is the idea behind the web-based strategy of the Pastificio dei Campi in Gragnano. Giuseppe and Giovanna Di Martino, third-generation pasta manufacturers, have created a virtual world connected with their products to provide support for their established brand founded in 1912. The portal dedicated to their pasta company is multilingual and filled with information, and the e-commerce option makes it possible for all users to purchase pasta from the comfort of their own home. And, finally, promotion via social networks enhances the company's visibility without major expenditure. "The web," says Giuseppe Di Martino, "was the only promotion vehicle used." And it worked well. Via the Internet, services were created at zero-cost. For example, using Google Maps, they were able to build a supply chain traceability system to allow producers to control each aspect of the process. And not only. All information, including the photos of the fields, can be viewed by consumers by just typing in the information found on the package in their possession. The billings of the company, which produces approximately 3000 kg of pasta per day, last year reached 7 million euros, up 3 million compared with just two years earlier.

buitoni, commercial with joe bastianich

Win a challenge in creativity launched by Joe Bastianich? Nothing could be easier with Buitoni products. In the company's new commercial for puff pastry, the judge of Masterchef makes a surprise visit to a young woman involved in preparing a ho-hum supper. He launches a challenge: invent a creative dish. She accepts, putting aside the boring supper she had planned and, thanks to Buitoni, succeeds effortlessly in making something out-of-the-ordinary. Even Bastianich, who continues to goad her as she prepares a quiche, finally has to admit that it is good. The commercial, created by Publicis Italia, marks the launching of an advertising campaign to publicize Buitoni as your best friend in the kitchen, each and every day, as encapsulated in the slogan "Prendi l'abitudine di cambiare" ("Make Change a Habit").





TECHNICAL CHARACTERISTICS

Height **190 cm**

Width **120 cm**

Depth **160 cm**

Weight **800 kg**

Installed power **5 Kw**

Production **200 Kg /h**

Width of sheet **250 mm**

PASTA SHEETS WITH HANDMADE QUALITY

The NSF250 sheeter, the latest addition, is a machine created to knead a dough consisting of eggs and flour, to obtain a pasta sheet similar to that made by hand. Huge tanks slowly mix the product. Once the desired texture has been obtained, the dough is sent to the sheeter where the kneading rollers convey it, without producing any kind of stress, to the cylindrical rollers that will transform it into sheets. It is due to the absence of compression (featured also in the other sheeters) that the sheets produced remain identical in colour and quality to the original dough.



SHEETER MODEL NSF25



cibus 2014

the strategic platform for international business networking



The Italian excellence meet national and international distributing world – a year away from Expo 2015, **the international food business community meets in Parma from the 5th to the 8th May.**



The 17th Cibus Food Fair will include new features that change the traditional International Fair in a multichannel fair, open to the whole food industry, from producers to distributors. An evolution that follows the latest market trends and prepares for the upcoming international event Expo 2015.

The new development of Cibus 2014, which will take place in Parma from the 5th to the 8th May, means a great variety of exhibitors, from large food companies to medium and small food enterprises, from national and international distributors to retailers and duty free companies, from producers of made in Italy product to producers of organic products, gluten free products, from traditional catering to travel and business catering. Cibus 2014 aims once again at “increasing the export of food made in Italy” but also at giving new impulse to the Italian market. Market statistics published last February by Federalimentare (the Italian food industry association, partner of Fiere di Parma for Cibus) show that in the period Jan-Nov 2013 the Italian market has decreased by -2.1%, while the international market shows a steady growth by + 7.1%.

What are the markets and countries interesting for Italian food export?

The data published by Federalimentare show that export has increased in the first 11 months of 2013 both in historical markets as Europe +4.9% and USA +5.9% and in new markets as Russia +21.3%, China +9.7%, Hong Kong +13.7%, India +10.5%, Brasil +7.2%, South Afrca +20.5%. The export growth is steady as well in Arabic markets: UAE +27.7%, Saudi Arabia +16.9%. Some Mediterranean countries show a remarkable growth: Turkey +20.7%, Algeria +67%, Libya +42.6%. Export in Eastern European countries has increased as well: Poland +13.3%, Romania +10.1%, Ukraine +15%.

In the last two years, Cibus has developed the project “Cibus Market Check” which has led tenths of Italian companies to meet distributors from potential export countries. As we speak, a delegation from Cibus composed of a large group of Italian companies is visiting Tokyo to meet buyers from the largest distributors: Aeon, Isetan-Mitsukoshi, Family Mart, Kinokuniya. Most buyers met during previous Cibus Market Check trips in 2013 and 2014 (USA, Brasil, Russia, Thailand, Japan) will also attend Cibus 2014. Thanks to a large investment in incoming partners, we expect more than thousand international buyers in the VIP programme organised from the main markets in America, South America, Europe, Middle East, Arab countries and especially Asian countries.

The focus countries during Cibus 2014 will be Germany, France, UK, Switzerland, Benelux within Europe and USA, Canada, Brasil, Japan and Russia for outside Europe. A special attention will be paid to countries in South East Asia (ASEAN), thanks to the great success story of the joint initiative Cibus/Aniga-Koelnmesse, which brought hundred Italian companies to the Thaifex Fair in Bangkok in 2013. As a result, the amount of Italian exhibitors there in 2014 will double. The cooperation between Fiere di Parma and Koelnmesse has been so fruitful that there is a new project for a similar cooperation in Beijing, China.



Export is not an exclusive option for large food companies, but must involve also medium and small enterprises. For this purpose, the new area “Italian Region B2B” has been introduced at Cibus 2014. Here the medium size industries from different Italian regions, that produce traditional Italian food, will be able to showcase their products to foreign import companies looking for fine food.

“We have been able to propose to producers and distributors a new Cibus version, even closer to the market’s needs – says Elda Ghiretti, Cibus Brand Manager – and we received amazing reactions. In fact, we have filled in the whole 130 thousand m3 of the Fair and have several exhibitors on our waiting list.”

Amongst the new entries this year are products with the Kosher or Halal certificate. Both market segments show interesting growth trends, especially from an export perspective. The occasion for this focus has been provided by a programme for certification of organic and religious food developed by the Italian Ministry of Economic Development together with Federalimentare and Federbio and with the cooperation of the Jewish Community in Italy, the Islamic Cultural Centre in Italy and the technical expertise of Fiere di Parma. In order to identify the exhibitors with certified products, there will be dedicated brochures for each of the categories Organic, Kosher or Halal food.

The programme

The Fair will be divided in 4 main areas: Fresh (salami, meat, cheese, gastronomy, frozen food and so on), Grocery (pasta, canned food, oils, sauces, confectionery and so on), Regional and International Specialties, Drinks.

Beyond its commercial profile, Cibus confirms its role as a hub for analysis, ideas and strategies to meet the challenges derived by consumption decrease and to propose solutions for market recovery.

There will be several events and special initiatives, which can be found in detail on the Cibus site <http://www.cibus.it/iniziativa/>.

Some highlights are: the Conference of the Nielsen and University of Parma on how to use the promotion leverage in distribution (with Giampiero Lugli, Professor of Distribution Marketing); the area “Cibus nel Dettaglio” (Cibus Retail) with hundred exhibitors, chosen amongst Lekkerland’s suppliers (Lekkerland is a leading multinational distributor of confectionery, drinks and impulse products in Italy) which will focus on the retail works; the area “Food Service”, an educational area to identify catering trends and focus; the area “Cibus Bollicine” which proposes a wide range of champagnes and wines that match food made in Italy; projects dedicated to organic food, gluten free food and frozen food.

Furthermore: the Alma Caseus contest for cheese companies and professionals organised by Alma, the Italian International Cooking School; the traditional EcoTrophelia contest organised by Federalimentare for university





students with a passion for environmentally friendly innovation in food; the micro breweries by MicroMalto.

During Cibus, the fifth edition of Nutrition & Integration Planet will take place. The interdisciplinary conference focuses on healthy food with meetings with doctors and scientific companies and an exhibiting area for healthy food.

Totally different and wider is the fringe, "CibusLand", with tasting and events in the streets of Parma, an area dedicated to food bloggers that will interact with Cibus exhibitors, a large Lounge "After Cibus" in the Palazzo del Governatore dedicated to visitors and exhibitors and developed in cooperation with the most dynamic companies that promote passion for Italian food in the world.

There will be several conferences (<http://www.cibus.it/convegni/>) starting with the initial conference which will focus on the state of the art of the sector, the Annual Meeting of Federalimentare, traditionally combined with Cibus, the three Focus Country on respectively China, India and South East Asia, the opportunities offered by the European programme Horizon 2020 (in cooperation with ENEA) and the focus on the most interesting technology for energetic efficiency in the food industry promoted by the European project SINERGIA. Furthermore: "Promuover il made in Italy, lezioni dall'estero" (promoting made in Italy, lessons from abroad), event that will award international distributors that best have promoted food made in Italy and a debate with Italian producers and retailers on initiatives to promote national products in Italy; "Alimentiamo le vendite" (Increasing sales), conference on commercial catering and travel retail with representatives from companies working in duty free and travel areas.



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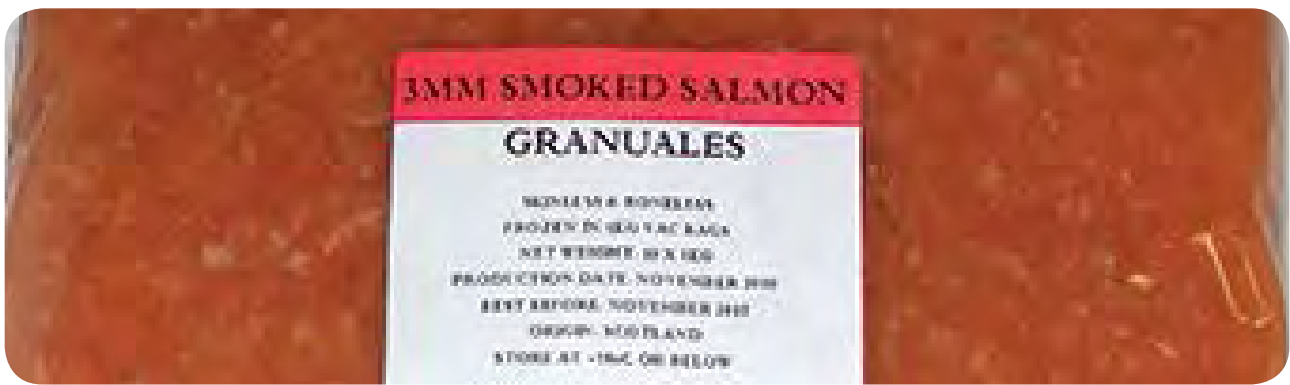
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jelex seafood salmon by-products featured at international trade fairs



Jelex Seafood, a Danish company specialized in the production and sale of **salmon by-products for the food industry**, meets with international pasta manufacturers at Seafood Expo and Alimentaria.

Jelex Seafood is a dynamic Danish company that operates with success on an international scale in the production and sale of salmon by-products for the food industry. At major upcoming trade fairs internationally, pasta manufacturers will have the opportunity of becoming acquainted with the broad range of products from their catalogue, ranging from salmon trimmings to raw or smoked cubed salmon, filets of fresh Norwegian salmon, frozen portions and filets, smoked and unsmoked salmon meat and smoked salmon flakes (used especially in the production of fresh filled pasta to facilitate the preparation of salmon-based fillings while guaranteeing quality and hygiene).

Jelex Seafood will be present at Seafood Expo (Brussels, 6-8 May) and Alimentaria (Barcelona, 31 March - 3 April). Those from the trade interested in learning about Jelex Seafood products can set an appointment by calling +45 20349097.





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felicetti launches “naked” pasta

“Naked” pasta and Pàche Monograno Matt. Two new products brought by Felicetti to Identità Golose 2014, the gastronomy trade fair held in Milan February 9-11. But what, exactly, is naked pasta? “Naked” involves a new concept aimed at highlighting pasta on its own, apart from the sauce, making it the key ingredient of a gourmet dish to be eaten with a knife and fork. Created by chef Davide Scabin, this new concept highlights the value of pasta and provides it with enhanced dignity all its own. Also making its debut at the trade fair was Pàche Monograno Matt, a new shape in the Monograno Felicetti line just slightly smaller than the traditional paccheri from the Campania region and whose name brings to mind Trentino dialect (in which pàca means a pat on the back).

surgital focuses on foreign markets

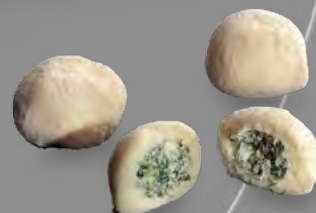
Looking abroad. This is the key to the future of Made in Italy products, according to Surgital, the Romagna-based company that each day produces 135 tons of pasta, 60,000 single-portion ready-to-serve dishes and 8 tons of sauces. Edoardo Bacchini and his wife Renata Tamburini, founders of the company, explain that they are launching major campaigns to promote Italian quality in a range of international markets in which they want to boost their presence. However, they stress that this does not mean the Italian market will be ignored. The company, whose 2013 billings were 60 million euros, currently exports 25% of its production in 50 countries around the world. To develop its internationalization strategy, Surgital made use of the Italian Investment Fund and took advantage of Elite, the integrated services platform of Borsa SpA.





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new provisions regarding the loading/unloading register



by Lino Vicini

The decree of the Ministry of Agricultural, Food and Forestry Policies dated 17 December 2013 and recently published in the Official Journal, defines **the regulations for the keeping of loading/unloading registers of milling products and pasta** with requirements different than those provided for in Presidential Decree 187/2001 when these products are destined for shipment towards European Union countries or other countries which have signed the European Economic Area Agreement. Let's take a look at what changes for manufacturers.



This past 13 February, the Official Journal of the Italian Republic published the decree issued by the Ministry of Agricultural, Food and Forestry Policies approved in concert with the Ministries of Economic Development and Health on 17 December 2013.

The decree specifies in detail the new regulations required to implement the requirements laid out in article 12 of Presidential Decree no. 187 of 9 February 2001¹.

Note that this latter provision calls for the keeping of loading/unloading registers of milling products and pasta with requirements different than those provided for in Presidential Decree 187/2001 when these products are destined for shipment towards European Union countries or other countries which have signed the European Economic Area Agreement.

Italian manufacturers are authorized by law to disregard the severe quality provisions regarding pasta if the products are destined for export.

It is clear that this overriding provision was introduced to avoid potential discrimination against Italian pasta makers in relation to their European competitors.

The latter, in fact, given the well-known principle of free trade within the European Union, are not required to adhere to the provisions established by Italian law regarding pasta manufacture.

Rulings of the Court of Justice and Italian Constitutional Court regarding pasta

The issue of discrimination of companies operating in Italy was already examined and resolved by the Constitutional Court with its ruling no. 443 dated 16-30 December 1997.

In that decision, the Council dealt with the constitutional legitimacy of art. 30 of Italian law 580/1967² regarding the use of ingredients not allowed in Italy in pasta products, but legally permitted in other member countries of the European Union.

Acknowledging that the provisions contained in Law 580/1967 were designed to protect quality-related characteristics of those Italian traditions considered worthy of safeguarding, the Constitutional Court declared the controversial law to be unconstitutional to the extent it did not allow Italian manufacturers to use ingredients legitimately permitted on the basis of EC law within the European Union.

The solution adopted by the Council had already been foreseen in another ruling by the EC Court of Justice (Glocken C-407/85 case 3) which had excluded that the provisions introduced by Law 580/1967 were necessary to respond to such pressing needs as consumer protection, fair trading or safeguarding public health, and therefore sufficient to justify restriction of the free trade of food products in compliance with art. 36 of the EC Treaty.



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A brief summary of the case is useful for understanding the full significance of the European court ruling. A German pasta manufacturer exported his product comprised of a mix of hard and soft wheats to Italy which a retailer in Alto Adige then re-sold on a national level.

When the local health board ordered an administrative fine be paid for the violation of art. 29 of Italian law no. 580 of 4 July 1967, the retailer and manufacturer of the pasta appealed to the Bolzano District Judge which brought the prejudicial question to the EC Court of Justice.

The issue involved the compatibility with EC law of the Italian regulation which forbid the sale of pasta produced using soft wheat or a mixture of soft and hard wheats.

The Court ruled that the Italian law was incompatible with articles 30 and 36 of the EC treaty because it represented a measure with equivalent effect, in clear contrast with the established principle of free trade of goods.

The 1995-97 EC law

Following the decisions of the EC Court of Justice and the Italian Constitutional Court, the Italian legislator responded with the 1995-1997 EC law which modified the existing legal framework.³

The Italian parliament acknowledged the Constitutional Court ruling of the existing contradiction between Italian and EC law.

The solution was to cease to have pasta exporters bound by the strict provision contained in art. 12 of Italian law 580/1967 which expressly prohibited “the sale, storage for sale or use to make bread, pasta, or any other types of foodstuffs, of any types of milling products with characteristics different to those set out in this decree”.

Provisions of Presidential Decree 187/2001

Finally, Presidential Decree no. 187 of 9 February 2001⁴ provided for specific regulations for the control and monitoring by public bodies of pasta products destined for foreign markets whose characteristics did not conform with those provided for by Italian law.

As a result, the production of pasta with characteristics different from those in articles 6, 7 and 8 of Presidential Decree 187/2001 for sale in international markets was permitted on the basis of written notification sent by registered letter with return receipt requested to the Ministry of Agricultural and Forestry Policies.

The Ministerial Decree of 26 April 2002 of the Ministry for Agricultural and Forestry Policies contained the original applicative provisions of art. 12 of Presidential Decree 187/2001.





Specifically, to allow the efficient management of the control system, this provision called for the adoption of specific models aimed at monitoring the amount of pasta exported.

Added to this was the goal of increasing and providing continuity in export-related statistics available in the Ministry's data base, as well as making it possible, through a practical decremental system, to know the exact status of customs operations relative to the authorization of the products in question.

In the original provisions (art. 5 of the Ministerial Decree) individual, basic raw materials with requisites other than those required by Presidential Decree 187/2001, and the materials utilized in the manufacture of milling products and pasta with other characteristics destined for export and not harmful to human health, were required to be entered in a special loading/unloading register containing a series of basic information.

In the loading register, for example, the date of arrival at the pasta factory, the quantity, type of milling product and the name and address of the supplier and information regarding sale and shipment documentation.

Plus, the date of arrival at the pasta factory, the quality, quantity and specific product name of the



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ingredients to be used in the dough, as well as the name and address of suppliers and information regarding purchase and shipment documentation.

The legislative objective in preparing these provisions was clear: to allow for direct and immediate control by monitoring bodies, in particular if the pasta for the foreign market was manufactured concurrently with products destined for the domestic Italian market.

Within this context, further provisions were made for mandatory storage in separate areas, with special signage reading "RAW MATERIALS AND FINISHED PRODUCTS NOT DESTINED FOR THE DOMESTIC MARKET" to be placed on all ingredients and pasta with requirements different from those required for Italy.

New provisions contained in the recent Ministerial Decree of 17 December 2013

Objective (article 1)

Before the new decree, the situation was as described above, but with its issuance, here are the new aspects that have been introduced.

Naturally, the starting-point for the analysis of the Ministerial Decree is the recent Presidential Decree no. 41 of 5 March 2013 previously examined in this magazine (see Pastaria DE no. 2/2013, p. 16 and no. 5/2013 p. 25).

Art. 4 of the Presidential Decree confirms the provision prohibitions contained in the 2001 regulations.

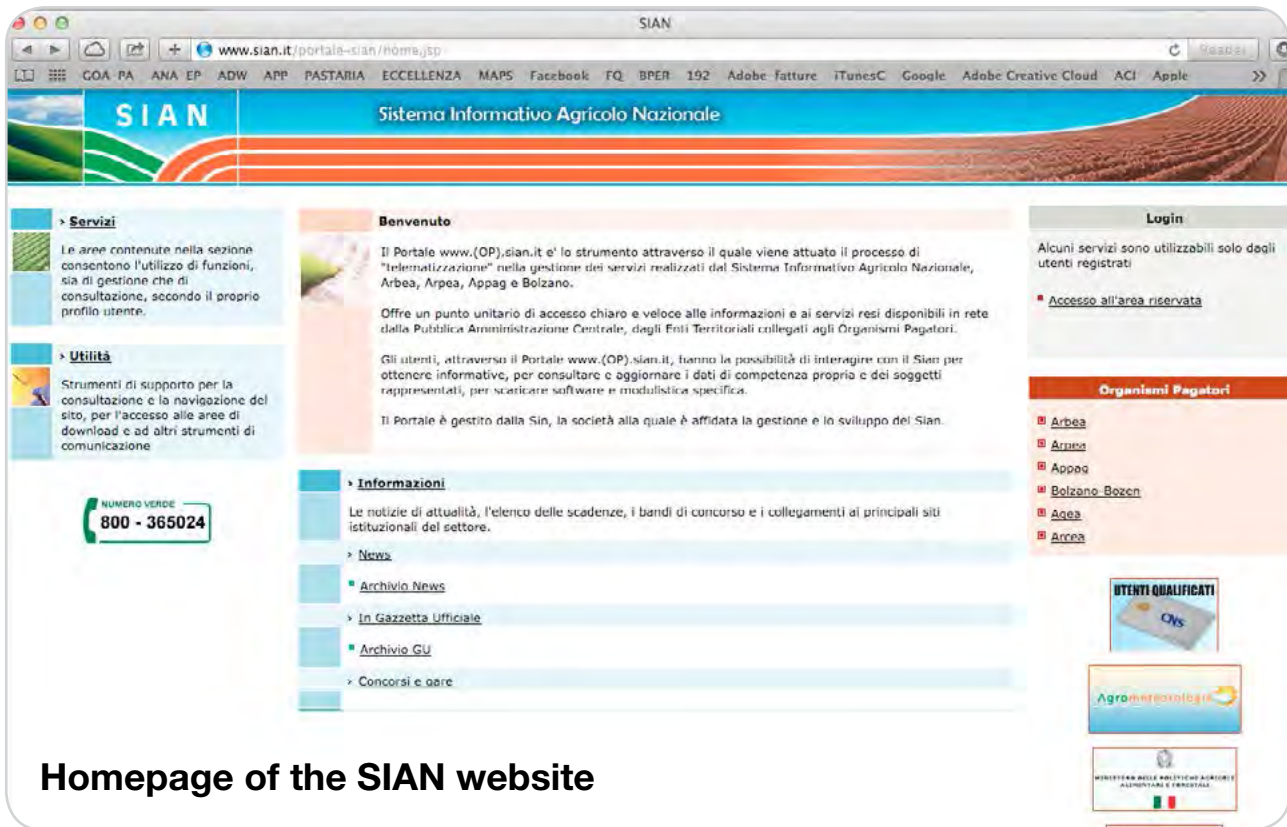
For clarity's sake, this provision reads as follows:

"With the exception of the conditions specified in Article 12, paragraph 1, and Article 48 of Law no. 128 of 24 April 1998, the sale or storage for later sale, even on the manufacturing premises, of pasta with different characteristics to those set out in this Decree is prohibited."

In addition, in terms of the Ministerial Decree providing applicative provisions of the previously-mentioned art. 12, also noted is "the need to define an approach that is uniform and aimed at simplifying the communication process for companies and assure administrators that compatible data are used", as well as "the preferability, for more effective management of the system, to provide for specific telematic transmission methods aimed at monitoring the amounts of milling products and pasta shipped to other EU countries, or other countries which have signed the European Economic Area agreement".

The final objective is that of simplifying communications management procedures currently provided for by law.





Homepage of the SIAN website

Creation of a telematic transmission system to manage communications as provided for in art. 12, paragraph 1 of Presidential Decree 187/2001

Operators interested must request enrollment in the telematic system (SIAN – Sistema Informativo Agricolo Nazionale/National Agricultural Information System) from the portal of the Ministry of Agricultural, Food and Forestry Policies.

Enrollment instructions are contained in Appendix 1 of the Ministerial Decree of 17 December 2013.

Those involved in the production of milling products and pasta as provided for in art. 12 must provide a separate communication for each type of milling product and pasta, at least five working days prior to the start of production to allow the Ministry department responsible to obtain the relevant information.

It also calls for communication of any increases in production for each type of pasta compared with that previously communicated through updating of the original communications, as well as any variation in



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Finally, it states that, no later than 31 January of the following year, manufacturers must provide the Administration with summary data for actual production and quantities exported or shipped as of 31 December, using the same telematic system procedures or operating methods.

Compilation procedure (article 2)

Compilation instructions are provided in Appendix 2 of the Decree in question.

The communication, which may only be compiled in digital format, must include the countries to which the product will be shipped.

Exchange of information (art. 3)

All exchange of information between customs authorities and monitoring authorities will be effected according to the approach of the one-stop customs service created by art. 4, paragraph 57 of Law 350/2004 and subsequent implementational procedures of the Prime Minister's Decree no. 242 of 4 November 2012.

Control procedure (art. 4)

The already-existing regulations in the preceding legislation regarding control procedures are confirmed. Specifically confirmed is the fact that manufacturing of products for foreign markets must be performed to make direct and immediate verification possible by monitoring bodies, in particular if said production takes places concurrently with pasta destined for Italy.

Raw materials and ingredients other than those that may be utilized for domestic products, as well as the finished products (for export) must be labelled in the warehouse using special signage.

The clearly-visible signs must read "RAW MATERIALS AND FINISHED PRODUCTS NOT DESTINED FOR THE DOMESTIC MARKET".

Registri di carico e scarico (art. 5)

The requirement to keep loading and unloading registers is confirmed, and the registers must conform to Appendix 3 of the Decree.

Entered in the registers are the raw materials with requirements other than those prescribed by Presidential Decree 187/2001;



ingredients not authorized for use in pasta for the Italian market;
ingredients intended to be used for production of pasta for export;
finished products obtained in conformity with art. 12 of Presidential Decree 187/2001 and, therefore,
destined for export.

Repealed regulations (art. 6)

The inter-ministerial decrees of 26 April 2002 and 29 November 2002 are specifically repealed.

Concluding Remarks

If the objective of the regulations outlined above is to avoid potential fraud and illicit mixing, as well as simple errors within pasta manufacturing plants that prepare food products not destined for the Italian market alone, the legislated operating procedures could perhaps have been better.

In fact, it could be said that the set of regulations is quite cumbersome and, in some points, decidedly obscure for those unused to the bureaucratic legalese.

As legal experts maintain, legislation should be as simple as possible and comprehensible to anyone.

Clearly, the continuous referral per saltum to past legislation does not assist those involved in interpreting it, or sector operators.

But the basic flaw of the provisions examined here must be seen in the failure to completely rework the body of the law regarding pasta and milling products, including following the rulings of the Court of Justice and the Council.

The legislative choice followed in 2001—approval of a regulation (contained in a presidential decree) with less authority than a law (i.e., law no. 580 of 4 July 1967) that exists alongside and partially modifies but does not totally replace the old legislation from the 1960s—creates a legislative context that is not easy to interpret.

In fact, despite the intervention of the Council and legislative action in 2001, the original legislative framework remains in place, with all its limitations.

In terms of the simplification of the data communication system and entry in loading/unloading registers, the ministerial decree could certainly have been more incisive and with greater impact on the requirements for operators.

The final verdict on the new aspects introduced is that they are definitely lacking overall.

In conclusion, it is singular that, in order to know the obligations it must fulfill, an operator in the pasta sector is forced to be familiar with at least five different sources.





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The Italian regulations, in chronological order, are:

- 1) residual provisions from Law 580/1967;
- 2) art. 48 from Law 128/1998;
- 3) Presidential Decree 187/2001;
- 4) Presidential Decree no. 41 of 5 March 2013;
- 5) Ministerial Decree of 17 December 2013.

As has already occurred in other sectors regarding alimentary law, compilation of a consolidated act encompassing the entire sector would be highly advisable and invaluable, including for eliminating doubt and potential errors by both producers and monitoring bodies.

Given the importance of this area for operators, Pastaria will continue to cover this topic in upcoming issues.

Note

1. Art. 12 (transitional and final provisions) Presidential Decree no. 187 of 9 February 2001 (replaced by art. 5 of Presidential Decree no. 41 of 5 March 2013: "1. In observance of aspects regulated by (EC) regulation No. 852/2004, the manufacture of milling products and pasta with different characteristics to those set out in Chapters I and II of this Presidential Decree is permitted provided that these products are destined for subsequent shipment to other EU countries or other countries who have signed the European Economic Area Agreement or export. The manufacturer shall fulfill the reporting requirements towards the Ministry of Agricultural, Food and Forestry Policies in accordance with the methods of transmission established in a special decree issued by the Ministry of Agricultural, Food and Forestry Policies in concert with the Ministry of Economic Development, the Ministry of Health and the Ministry of Economy and Finance, within one hundred and eighty days of this Presidential Decree coming into force. 2. The raw materials and substances different to those which may be used to manufacture milling products and pasta for the Italian market, which are intended for use in the manufacture of milling products and pasta as referred to in paragraph 1 and the finished products with different requisites from those prescribed, may be stored inside the same premises as those used to store end products, raw materials and substances used in the manufacture of milling products and pasta intended for the Italian market provided that they are clearly marked in the warehouse by means of signs bearing the wording: 'raw materials and/or finished products not destined for the domestic market' or by any other means which makes direct and immediate control by the supervisory bodies possible. 3. The individual, basic raw materials having characteristics different to those prescribed in the regulations in this Decree, as well as substances which have not been authorised for use in the manufacture of milling products and pasta in accordance with this Decree, but which are intended for use in the manufacture of milling products and pasta in accordance with paragraph 1 of this article and the finished products must be recorded in a special loading/unloading register. The characteristics of this register and how it is to be kept are set down in the Ministerial Decree referred to in paragraph 1. 4. Notwithstanding the provisions of Article 48 of Law No. 128 of 24 April 1998, and Article 9 of Presidential Decree No. 502 of 30 November 1998, it is forbidden to import milling products and pasta having characteristics different to those set out in the regulations of



this Decree and the provisions laid down by the administrative bodies envisaged in this Decree. 5. Up until the date in which the provisions contained in the decree issued by the Ministry of Agricultural, Food and Forestry Policies, as referred to in paragraph 1, come into force, with regards to the loading/unloading register, the provisions referred to in the Decree issued by the Ministry of Agriculture and Forestry Policies of 26 April 2002 and subsequent amendments, published in the Official Journal, No. 113 of 16 May 2002 holding the applicative provisions of Article 12, paragraphs 2, 3 and 4 of Presidential Decree No. 187 of 9 February 2001 concerning the revision of the standard on the manufacture and marketing of milling products and pasta shall be applied."

2. Italian law no. 580 dated 4 July 1967, Regulation on the manufacture and marketing of cereals, milling products, bread and pasta, Official Journal no. 189 dated 29 July 1967.

3. Art. 48 of law no. 128 of 24 April 1998 Provisions for fulfilling obligations deriving from Italy's membership of the European Communities (EC law 1995-1997):

"Food Products

1. The provisions concerning the ingredients, composition and labelling of food products referred to in Law no. 580 of 4 July 1967 on the manufacture and marketing of cereals, milling products, bread and pasta, shall not be applied to food products imported and sold on national territory which have been legally manufactured and marketed in other EU Member States or other countries which have signed the European Economic Area agreement. 2. Labelling of products specified in Paragraph 1 must conform to the provisions in directive 79/112/EC of the Council and subsequent amendments. 3. Food products that contain genetically modified organisms in any form or their derivatives, must be clearly identifiable to the consumer through labelling which must clearly indicate that the food product contains genetically modified organisms in full or in part, or their derivatives."

4. Presidential Decree no. 187 of 9 February 2001 (in the Official Journal no. 117 of 22 May) introduced the Regulation for the revision of the standard on the manufacture and marketing of milling products and pasta, in accordance with article 50 of law no. 146 of 22 February 1994 (EC law 1993).

With this provision, numerous articles (6, 7, 8, 9, 10, 11, 12, 13, 28, 29, 30, 31, 32, 33, 34, 35, 36 and 50, paragraph one) of law no. 580 of 4 July 1967 ceased to be in effect.

If you want to know more, read:

Decree of 17 december 2013: for AIDEPI, a significant step forward
(page 46)

Decree of 17 december 2013: what some manufacturers are saying
(page 49)



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decree of 17 december 2013: for aidepi, a significant step forward

by AIDEPI



Luigi Cristiano Laurenza,
secretary of the Pasta group of AIDEPI

For AIDEPI, the publication of the decree of the Ministry of Agricultural, Food and Forestry Policies dated 17 December 2013 represents **a significant step forward in the direction of streamlining export procedures.**

Recently concluded the legislative process that has led to the publication of the much-awaited Decree of 17 December 2013 entitled: "Applicative provisions of article 12 of Presidential Decree no. 187 of 9 February 2001 concerning revision of the law on the manufacturing and marketing of milling products and pasta".



This provision, in turn, is based on Presidential Decree no. 41 of 5 March 2013 and was vigorously championed by AIDEPI (Italian Association of Confectionery and Pasta Industries). The provision modifies a number of important aspects of Presidential Decree 187/2001, better-known in the sector as the "Purity Law".

AIDEPI worked assiduously to obtain the changes that were incorporated into Presidential Decree no. 41 that brought significant results, including: the possibility of mixing the three protected-name pastas; detailing of the calculating analysis parameters of special pastas, assuring that the parameters apply exclusively to the basic raw materials utilized; modification of sterols and ethereal extract in eggs used in egg pasta; the possibility of identifying in storage areas the raw materials and finished products not destined for the domestic market, using "methods that render their control by monitoring bodies immediate and direct" as an alternative to the sole, previous method involving labeling with the message "raw materials and/or finished products not destined for domestic markets"; and elimination of the regime governing authorizations for exports, which is replaced by a simple communication to be made using a telematic transmission system as provided for in the Decree of 17 December 2013.

It is this last point that perhaps represents the aspect of greatest satisfaction for pasta firms that no longer need to wait with baited-breath for MIPAAF authorization before exporting, but can begin production of pasta that does not conform with Presidential Decree 187/2001 if advance notice is given to MIPAAF.

The procedures for sending these communications were the subject of extensive discussion between stakeholder associations, AIDEPI first and foremost, and the administrative bodies most involved, specifically MIPAAF, MISE, ICRQF, the Ministry of Health and Customs Agency—a process which culminated in the recent publication of this Decree.

The provision calls for the creation of a telematic system to manage the communications as provided for in art. 12 of Presidential Decree no. 41 of 5 March 2013, instructions on how the communication form should be compiled and how to compile the loading and unloading registers that have been retained in the new version of Presidential Decree 187/2001, in which information on how to facilitate controls by ICRQF is given.

"AIDEPI," says the Secretary of Italian Pasta Makers, lawyer Luigi Cristiano Laurenza, "believes that a significant step forward has been made towards streamlining export procedures and they are, in fact, much-simplified compared with the past. It is now up to the operators as they utilize the system to evaluate the functionality of the new procedure."

Laurenza continues: "The Association has noted the willingness of the administrative bodies to make any necessary changes along the way."



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decree of 17 december 2013: what **some manufacturers are saying**



Many Italian manufacturers were caught by surprise by the publication of the decree dated 17 December 2013 which defines the procedures for keeping the loading/unloading registers for milling products and pasta with different requirements than those prescribed in DPR 187/2001 destined for foreign countries. Despite the logic behind the measure, which attempts to lessen bureaucratic red tape for exports, **many fear it represents a further increase in the requirements that are already a heavy burden for Italian companies.**



We may have even created a special ministry, but we Italians just don't seem able to make things easier for ourselves. As if the endless administrative, hygiene, fiscal, safety and environmental measures weren't enough to complicate the lives of businesspeople. Now MIPAAF has weighed in, deciding in conformity with article 12 of Decree 187/2001, to introduce a complex system to monitor the amount of milling products and pasta exported to foreign countries. So, new measures are on their way for pasta manufacturers, while the innumerable monitoring bodies will now have other controls to carry out involving the processing of raw materials, the materials utilized and how they are stored.

This only involves a part of the pasta-making population, but was there really a need for such a measure? Or could a less-onerous and -involved way have been found to monitor the production of certain types of pasta destined for the international market? We asked manufacturers and others in this sector who—to our great surprise—were not always informed about the decree.

The sensation is that this decree was passed in silence, in spite of the philosophy that laws should not create new measures and responsibilities for companies.

Many businesspeople we contacted knew nothing of what it contained, or even that it existed. But don't think this oddity is due to a lack of motivation of those involved to keep themselves informed. Anything but. The reaction of those interviewed was one of preoccupation. It was right and correct to take up the law involving pasta and, in particular, special pasta, but this appears to be just another bureaucratic blow against the same old crowd.

"A formal commitment, like this one, which risks impacting heavily on the production of companies, seems to be designed more to block small companies than large ones. While more highly-structured pasta manufacturers have automated systems thanks to which data regarding production and quantities exported can be generated easily, for small pasta-makers such a synthesis is not so immediate. In any case, for everyone, it is yet another commitment that will reduce the time and space for production and, as a result, translate into costs. In addition, the requirement to send a separate communication to the Ministry for each type of milling product and pasta at least five days prior to the start of production shows that government is unfamiliar with how the market works and its timeframes. The market waits for no one, even less-so the red tape of the Italian bureaucracy, especially when selling abroad." These the comments of Vito Ligorio, partner of the Il Mattarello pasta company in San Vito dei Normanni, near Brindisi.

"But if we already have to compile a mountain of HACCP documents, especially regarding product traceability, why are they now requiring this further measure?" asks Caterina Venusti of the Pastificio Venusti in Parma. And, in fact, it is something no one is able to answer. "This decree is just the umpteenth exercise that reduces the time available for productive activities and important things," states Mrs. Venusti. She, like many of those contacted, attempted to get information from her trade association, but it seems



The Evolution of the species





that little is still known about the law, including among those in the sector.

At Canuti Tradizione Italiana pasta manufacturer the position is somewhat different. Since Canuti does not produce the type of special pasta covered by the law, it is not subject to the controls provided for, nor is it required to send the pre- and post-production communications called for. Although aware that it is yet another bureaucratic measure to be added to those that must already be taken into account, the company notes that, in essence, this type of regulation is aimed at safeguarding the consumer and those companies who operate in a conscientious way. Every time a new regulation that imposes a certain behavior or particular measures is introduced, the impact is always difficult. But following an initial period of adaptation, even that requirement which requires time to comply with becomes routine and is done without too much problem. When a company produces special food products, it is only logical that the controls and requirements increase, but this does not always generate organizational or management problems that cannot be overcome in the short-term.

At the Fiorillo pasta company, the decree is also being interpreted in its entirety, taking into consideration the positive aspects, and not just the negative ones. "I would like to think that this measure was created to safeguard 'Made in Italy' in our country and abroad.

The purpose of loading/unloading registers for raw materials is to monitor the product as it arrives and





leaves so that one type of pasta is not sold for another. However, the measures adopted might be too strict and require excessive commitment and attention. The pasta we Italians make is, on average, of very high quality and it would be difficult in Italy—even if one wanted to—to sell a product with lower-quality flours instead of hard wheat semolina, because consumers would notice immediately. Nonetheless, the commitment required does seem excessive, and especially for small pasta manufacturers,” Fiorillo notes. While in large-scale production, the addition of soft wheat flours to semolina, including in dried pasta, could be cost-effective, when smaller quantities are produced, this advantage is negligible or nil, so there is no benefit in economic terms. So, how can we deny what those, like Fiorillo, maintain that perhaps given the measures requested and considering that they are in addition to other requirements already in place, these new ones are excessive? Perhaps a shorter or less-onerous route could have been found to meet the goal of maintaining the high quality of Italian pasta. Assuming, of course, that there was a need.

We would like to thank:

Vito Ligorio of Al mattarello pasta factory (San Vito dei Normanni, Brindisi), Caterina Venusti of Pastificio F.lli Venusti (Parma), Michele Fiorillo of Pastificio Fiorillo (Piscopio, Vibo Valentia), Canuti Tradizione Italiana pasta factory (Rimini).



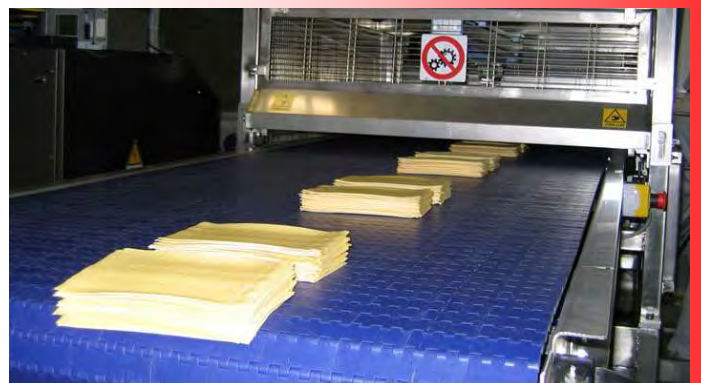
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canuti tradizione italiana



One of Italy's leading quality pasta makers protagonist of a major corporate relaunch. Frozen foods and the HORECA channel the strong points of the new Canuti Tradizione Italiana.





Denis Cecchetti,
CEO of Canuti Tradizione Italiana

The story of Pastificio Canuti—founded in 1950 and a pioneer of frozen fresh pasta in the 1980s—is an all-Italian one, from the very beginning right up to the present day. All-Italian for the places and ways in which this manufacturer was born and grew. For the care and passion it brings to research and production, and for the most recent developments involving the company which have instilled new life into its future prospects. In an Italy in profound economic crisis, even well-structured pasta manufacturers firmly rooted in the market find themselves facing enormous difficulties. But, as often happens in the "Bel Paese", the proverbial ability to have second thoughts—if necessary—has allowed this company to make profound changes in the way it





operates in order to continue to do as well, or even better, than it has from 1950 to the present. And so, the well-established Canuti pasta manufacturing company, known not only for the high quality of its pasta but also the commitment of a family that has run the company for three generations, over the last two years has revamped the company's corporate structure, management, main distribution channel and—as incredible as this may seem—even the quality of its product, raising it to an even higher level.

In this major process of corporate renovation which required two years of work and still cannot be considered finished, the original pasta company has changed its name to Canuti Tradizione Italiana and has made a major investment from every standpoint.

The most sensitive decision implemented by Denis Cecchetti (Sole Director), Gilberto Giovannini (Director of Sales) and Matteo Baldacci (Director of Production) was that of sacrificing the entire fresh pasta division to concentrate all their energy on frozen pasta. The fragmented nature of fresh pasta production, destined for





sale in large retail outlets, involved an extremely high level of wasted energy which diverted from investment in new clients and new countries. Faced with having to reorganize its entire production system, the company chose to concentrate on the quality of frozen products and service to an increasingly-demanding professional clientele. As a result, the direction taken was to reduce the product range by ending production of fresh pasta for the large retail distribution channel in order to guarantee greater research and higher value added of frozen fresh pasta production for the HORECA channel.

In terms of quality, Canuti chose to respect the original spirit of the company's founders by transforming good pasta into an excellent "ingredient" for the most demanding chefs in Italy and throughout the world. As a result, Cecchetti and his staff decided to make a leap in quality by placing the emphasis on even higher-quality raw materials, using a number of top-quality Italian products—protected denomination of origin, but above all specialties, including niche products with close ties to their local areas. Among these, to name only a few, are stone-ground flours, free-range eggs, Parmigiano Reggiano DOP, Bologna IGP Mortadella, sheep of the Val di Funes (Slow Food protected) and Sicilian scampi. In this way, Canuti Tradizione Italiana is investing in the updating of around 200 fresh IQF items, and an enviable ability to respond to specific client requests in terms of shape and custom regional recipes.

The quality of its sheet pasta is guaranteed by the use of a traditional bronze die and slow processing method, despite the over 1,100 tons of pasta produced each year for national HORECA channels (approx. 70%



of its revenues) and over twenty markets in European countries, the United States, Middle East, Singapore and Japan.

Currently, there are five product lines and their names alone indicate a maniacal attention to quality. The first and widest, "Canuti", offers the classics of the Italian pasta tradition; the second, "Le Riscoperte" (The Rediscovered) offers a selection of specialties made from stone-ground flours. "Le A Mano" (The Hand-Made), as the name itself in Italian indicates, are made one-by-one to offer a product of extremely high quality. "Canuti Express", a line of quick-cooking pasta, was designed and created for major restaurants that do not want to use pre-cooked pasta, but require rapid cooking times. In fact, this pasta, although it is fresh and without having been subject to precooking during the manufacturing process, guarantees extremely quick preparation times. The most recent arrival is pasta with Halal certification for the Middle East and Far East markets, but also all those with a significant Muslim presence, such as France and Germany.

But the Canuti Tradizione Italiana revolution does not end here. In less than two years, major investment has also been undertaken on a structural level, with the introduction and use of new equipment and merging of two production areas which, in the past, operated separately. The company has also expanded the number of certifications it holds. In addition to UNI EN ISO 9001:2008 which it has possessed for some time, BRC and IFS were also added at the end of 2013, placing the company at the top of international product safety standards.

The internal organization of personnel was also overhauled radically, also thanks to the cooperation of its employees who, displaying a tremendous willingness to adapt and respond to the challenge placed before them.

In terms of communications, new strategies are in the process of being developed which include, among other things, the construction of a new corporate website.

All this has not only allowed them to maintain the entire portfolio of clients the Canuti family had created over sixty years of business activity, but also expand it, that will translate into well over 7 million euros in revenues in 2014.

Their goals for the future are ambitious. The company aims to increase its presence abroad, while continuing to remain true to Italian tradition and quality which, once again, has proven to be its secret weapon. But it's not as if they need one. Cecchetti and his staff have shown that for us Italians, quality is not a goal to be attained, but a treasure to be safeguarded—always.

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- The cooking time can be set according to the parameters of the recipe;
- Washing and cooling tank for the product;
- Safety devices according to the laws in force;
- Control panel for the control of the cooking and production parameters.



barilla: film, russia and pasta in 3d

Pasta “printed-to-order”, support for the Italian film industry, a new factory in Russia and, finally, plans for the Far East market. The news from Barilla is giving the sector a lot to talk about. The project that seems most innovative is its “pasta in 3D”. It involves a system which will allow selected restaurants (perhaps only those under the Barilla brand) to print pasta to meet individual customer needs. Not just in terms of ingredients, but also shape, which can be chosen and designed directly by the consumer.

Experimentation with this technique is being handled by a Dutch company, TNO of Eindhoven, involved for years in 3D printing, which has now unveiled this secret project that the Parma-based company has been working on for two years. Thanks to this technology, normally utilized with plastics as well as cement, Barilla could supply restaurants with just a basic mix for pasta. Then, equipping them with the necessary equipment and software, the restaurants themselves would create the pasta in a full range of shapes. The first 3D food printers have already been delivered to a number of businesses in Eindhoven for testing, but there are still a number of things to be perfected. In the future, this technology could also be applied in supermarkets, starting, perhaps, in New York.

Other news from Barilla includes the opening of a new factory in Russia in Solnechnogorsk near Moscow. The announcement of the opening was made by AD Claudio Colzani in an interview with the Financial Times, news which has alarmed the trade unions. Russia is, today, the fourth largest pasta consumer country after the United States, Italy and Brazil.

In terms of the Asian market, Barilla has assigned to an agency in Singapore (where the company opened a branch office two years ago) the creative communications for the Asian and Pacific markets that are ready to welcome the Mediterranean Diet and its primary ingredient— pasta. More than China, the company is looking to the vast South-East Asian market.

Another piece of news from the Parma-based multinational is its support for the film, “Un Fantastico Via Vai”, directed by Leonardo Pieraccioni. Its sponsorship was made possible through product placement and the External Tax Credit (ETC), a new tax incentive opportunity to support investment in Italian films.



aidepi, "**made in italy**" and the pasta market



AIDEPI releases **the most recent figures on pasta exports**, reaffirming its position on the question of Made in Italy and indication of the origin of raw materials on the label.



Even leaving aside the media-generated confusion that often arises between falsification—which is really and truly a crime—and what is meant by "Made in Italy", the recent comment of the president of the Italian pasta-makers association (AIDEPI), Riccardo Felicetti, should be noted: "Accusing those high-quality products that have always been an icon of Italian entrepreneurial skill of being Made in Italy fakes is inconceivable."

In the recent debate that has stirred the Italian press on the sensitive question of the indication of the origin of ingredients on the label, a call was made by journalist Roberto La Pira in the pages of his online publication, "Il Fatto Alimentare", in which he invited some of the leading pasta makers in Italy to provide these indications on the label, or else explain why they choose not to, although recognizing the truth of some of the observations pasta makers have always raised against indicating ingredient origins. For example, the fact of using Italian raw materials for the production of pasta does not necessarily mean the product is actually better, or the fact that the amount of hard wheat produced in Italy is absolutely insufficient to cover domestic needs. The website of "Il Fatto Alimentare" says the description "Made in Italy" on pasta packaging is completely legitimate since both the processing of hard wheat semolina and semolina into pasta is performed in Italy and that, therefore, producing pasta using 100% Italian wheat is a choice and not a requirement.

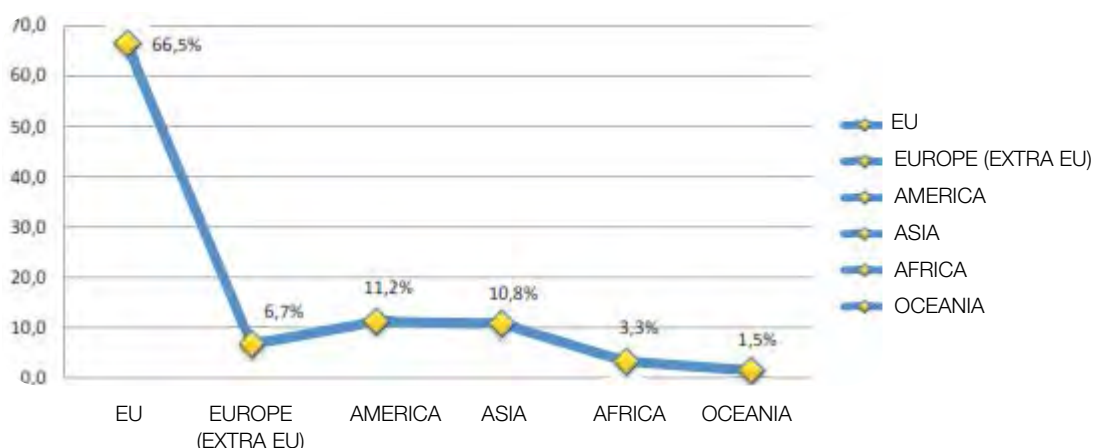
The invitation from "Il Fatto Alimentare" did not fall on deaf ears and many AIDEPI member companies fully explained in a number of letters and using clear examples, the reasons why Italian companies purchase part of the wheat they use from abroad, and the high quality of Italian pasta thanks to the extraordinary ability of pasta makers to select the best grain from around the world.

The companies explicitly declared that the systematic indication of ingredient origin on the label, especially in the face of high production yields, results in very complex compliance difficulties, as well as significant additional costs. In fact, continuous variation in the source of supplies used makes it difficult to keep information on the origin of raw materials in the finished product accurate and up-to-date, due to the new labels that would have to be printed in continuation, and costs related to these changes.

Despite these difficulties, the sector has been asking for some time, including on an association-wide level, what are the best ways to indicate that Italian pasta is made using mixes of the best wheats in the world and is the result of meticulous quality selection. However, this process must proceed taking into consideration the EU-wide harmonization of food product labeling and respect for EU regulations. Especially relevant in this regard will be the applicative measures in EU regulations 1169/2011 on the voluntary and obligatory origin of food products that will clarify how and for which sectors these indications must be carried out in conformity with transparency for consumers, while establishing the rules that will be valid for all those within the EU.



**Geographical distribution of Italian pasta exports. % of total volume
(January-October 2012-2013)**



Source: AIDEPI elaboration based on ISTAT data

Not being able to add the "Made in Italy" label would mean losing an edge in countries that import Italian pasta which is loved throughout the world, as the most recent export statistics show. In fact, from January to October 2013, nearly 1.6 million tons of pasta were exported, a percentage increase on the same period in 2012 of 5.6% for a value of 1.682 million euros, also representing a 4% rise on 2012.

The five major purchasing countries are, in order of importance: Germany with a 18.9% share, followed by France (14.6%), the United Kingdom (13.1%), the United States (7.2%) and Japan (4.1%). These five countries alone account for more than half of Italian pasta exports (58%).

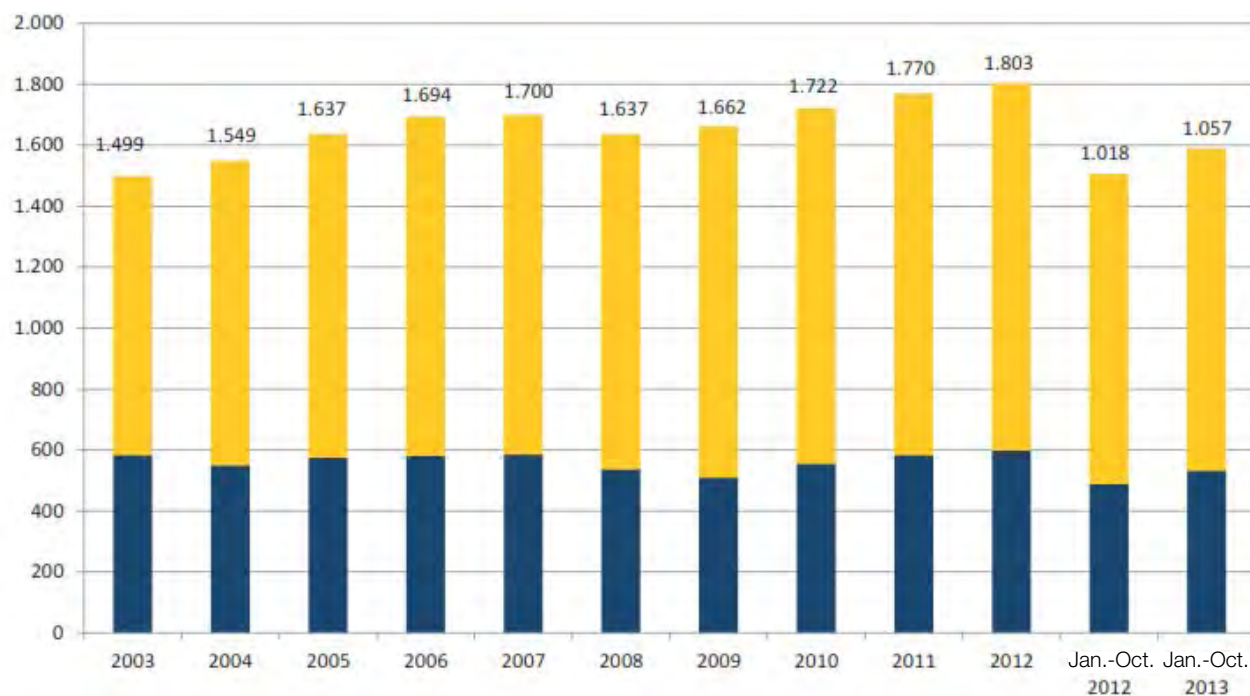
The quality of Italian pasta, combined with its positive image as the basis of the Mediterranean Diet, have decreed the success of this product even in countries with very different cultures and methods of preparation. For example Russia, where Italian pasta exports total more than 40 million euros, with an increase on the previous year of 25.6%.

China has also shown itself to be very interested in Italian pasta, with an increase in imports of 36% and clear potential for exponential growth (also considering the fact that a product with similar characteristics — noodles — is already consumed), as have the United Arab Emirates, with a growth rate of nearly 33% and value of exported pasta of over 8 million euros.

More generally, the entire continent of Africa represents a very interesting market and, in fact, the



Trend and destination of Italian pasta exports, thousands of tons
(2013-2012 and January-October 2012-2013)



Source: AIDEPI elaboration based on ISTAT data

■ to non-European countries

■ to European Union


percentage growth rates in some countries bear this out, for example, Libya, with imports worth about 9.5 million euros and an increase of over 327%.

As can be inferred from these figures, foreign markets represent the most interesting challenge facing Italian manufacturers, while also offering an escape valve for the troubled domestic market.

Therefore, it is more important than ever that the "Italian-ness" of a product that has always been symbolic of our country and one envied the world over, not be placed in doubt.



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scrapping the old way of marketing pasta: **towards a socialing approach?**

by Marino Rossi



A “**socialing-oriented**” company places at the center of its business strategies the actual needs of consumers, systematically improves the quality/price ratio of its products, develops its social and environmental responsibility in the local area it operates and, through intellectual and organizational innovation, contributes to the growth of social capital and the quality of life within its own community.



With the new year have come new trends in what we have always called the world of marketing.

For the moment, they involve the first real appearance of terminology defining concepts that are already quite familiar to those active in this area.

It is an established fact that, unfortunately, marketing is suffering the effects of concerning itself solely with the limited attempt to affect needs and consumption.

The need of businesses for immediate sales at all costs translates into a never-ending series of offers, promotions and token incentives that inundate and overwhelm consumers, often only creating disillusionment or out right rejection.

A part of the population—still a minority but growing—is evolving away from mass consumption to becoming more “responsible” buyers, more attuned to innovation and conscious of the environmental and social impact of their consumer behavior.

This is a bracket which, in Italy, studies show to be about 20% of individuals, defined as “prosumers”. This term, the fusion of “producer” and “consumer”, identifies a user who, emerging from the traditional passive role, takes on a more active type of behavior in the process of approaching, selecting and purchasing goods.

This phenomenon derives from the perception that today’s economy does not serve customers, and that it is the customers, in fact, who serve the economic system which is increasingly removed from the real needs of purchasers.

This phenomenon, which has been underway for years, has recently become more accentuated. Experts such as Paolo Anselmi, Vice President at GfK Eurisko, note that “the crisis we are experiencing has features that, in the perception of consumers, make it very different from those in the past in terms of duration, social impact (as of March 2013, 75% of Italians declared they felt themselves to be directly “touched” by the economic crisis) and uncertainty over how long a ‘recovery’ would take (39% of those interviewed feel, in fact, that we will not emerge from the crisis before 2016). The effects of such a prolonged crisis are not just immediate—they also have a deeper impact, modifying values and consumption models. In addition to immediate, “tactical” answers—such as putting off larger purchases and extreme attention to prices—what also emerges is a gradual rethinking of the traditional, carefree approach to consumption in favor of a new model based on sobriety, responsibility and sustainability. And it is the issue of environmental sustainability which occupies a key position: 36% of Italians declare they are “very attentive” to the environment and 56% “fairly attentive”. The awareness of the contribution each of us can make in providing a solution to the problem is gaining ground. The period we are passing through represents an ethical and cultural shift that is leading towards a new, more aware and more responsible model of consumption, characterized by choosing more “ethical” products and brands. When they purchase a product, 34% of Italians feel it is important that the product reflect ethical, social and environmental criteria, and, in the last twelve months, 47% have decided not to purchase certain products or brands because of their lack



of a sense of environmental or social responsibility. What we are witnessing is an overall reformulation of the “perception” of consumption towards the direction of subjective well-being, where the desire to contribute to collective well-being and safeguarding the common good is becoming increasingly important.

This phenomenon has also been confirmed by other studies. Havas found that 69% of Italians pay attention to the environmental and social effects of purchasing behavior, compared with the European average of 57%, with the level arriving at 84% for the prosumer bracket.

In terms of product traceability, 63% of Italians consider it to be important, rising to 82% among prosumers; similarly for origin, with 67% declaring they are in favor of consuming local products or, at least, those originating in Italy (84% among prosumers).

Finally, it was found that 55% of Italians would accept paying more for products that do not harm the environment or which have social value (75% of prosumers).

The level of Italians who do not like being identified solely as consumers is above the European average, as is the percentage of those who believe they can influence corporate behavior based on their purchasing choices: respectively 77% and 66% of prosumers.

We see, therefore that the trend for the percentage of informed and ethical clients continues non-stop, even if the intent is not always reflected immediately in the facts.

These new models of behavior require companies—including, of course, pasta manufacturers—to change and conform to this new situation. The “socialing” approach was developed to provide a concrete response to the changes underway.

As Andrea Farinet, coordinator of the European Socialing Forum explains, “socialing offers organizations and businesses new ethics-based approaches towards consumers and markets by prioritizing the real needs of people and re-establishing the primacy of human and social relations in the exchange between economic and other players. Socialing represents an evolution in traditional marketing which has lost its significance: too often it means manipulation, seduction and symbolization. Socialing, on the other hand, sets out to re-establish a relationship between companies and consumers based on horizontality, reputation, authenticity and reciprocity.”

A “socialing-oriented” company places at the center of its business strategies the actual needs of consumers, systematically improves the quality/price ratio of its products, develops its social and environmental responsibility in the local area it operates and, through intellectual and organizational innovation, contributes to the growth of social capital and the quality of life within its own community.

The socialing approach was born of the need to “reinterpret” the economic transformations occurring at the close of the last century in light of those in progress at the turn of the new millennium within the current social-political context of the advanced economies in crisis, while making an effort, in particular, to grasp the essence of cultural roots.





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Marketing strategies which, in the past, determined the success of Western businesses, must now be profoundly re-thought from the standpoint of a new approach capable of creating consensus around a participation-based economic model.

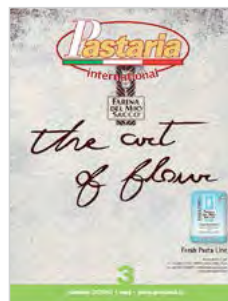
Business activity must, therefore, be inspired by a new type of orientation: the sources of competitive advantage are creativity and innovation and, more generally, everything involved in creating value for the customer.

These advantages can only be obtained by combining and promoting high-level professional talent. The competitive axis rotates around the ability to build relationships, both inside and outside the company, which are differentiated, generally long-term and with a vast and heterogeneous group of players.

Increasingly, the corporate structure must become more open and collaborative, superseding the closed corporate environment. If the market tends to be seen as a system of relationships rather than transactions, the psychological and emotional dimension takes on a predominant role.

Those interacting with the company are not clients whose experience ends with the consumption of the product/service offered, but individuals in which emotion, reason and ethics interact.

At the same time, alongside traditional, commercial-type activity, initiatives indicating the growing awareness of



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the company towards the social and environmental impacts of its activity also multiply.

The ethical commitment companies are increasingly willing to take on promotes the social legitimization process, increasingly important for reaching economic goals.

Socialing is a cultural and managerial horizon that is part of this mosaic of the old, encrusted behaviors and new value systems.

The point of departure is offered by the current scenario of profound crisis and changing models of advanced economies. In the wake of this evolution which has produced a consumer who is more aware, informed and critical of an overly supply-focused market economy, we could see a new way of doing business and an improved relationship with the environment.

A socially-responsible company becomes an economic player which, through socialing, contributes to the overall improvement of the life of the community in which it operates.

This occurs thanks both to the strengthening of its local ties, as well as the proliferation of opportunities and means of exchange between the various players. Within a context of widespread difficulty, the duration and quality of relations with the market depend on the efficacy of the social communications and business policies involving its goods and services.

Of course, this does not mean that pasta manufactures must abandon completely their current marketing policies and strategies, but it is time for our sector to also reflect seriously on current trends and equip themselves early with those tools most suitable for and coherent with this new way of approaching the market.



grano armando lands in holland

Grano Armando has arrived in Holland. And it has arrived “en masse”. Pastificio De Matteis, proprietor of the brand, has signed an exclusive distribution agreement with the largest supermarket chain in The Netherlands, Albert Heijn, which distributes top-quality products in over 800 retail stores. This pasta from the Campania region represents the lead product of a series of Italian food items to be sold in the chain and whose wholesomeness and quality are featured in a commercial. Also especially popular with the Dutch public was the zero impact packaging of “Grano Armando”. This brand, headquartered in Irpinia and founded about a year-and-a-half ago, features the quality of pasta produced using prime wheat cultivated by Italian farmers who adhere to the Armando supply chain agreement.

savuré, the “pastificio con cucina” takes its kitchen on the road

First Turin. Then Milan, London, Paris, Brussels, Berlin and Munich. These are the destinations of the “Savuré Tour”, the “pasta manufacturer with kitchen that is launching the concept of ‘fast casual dining’ — an evolution in fast food and street food,” explains entrepreneur Riccardo Andreoni, “combined with the highest in quality.” The project was launched recently in Turin where 16 different types of pasta which could be sauced in 14 different ways were offered. Customers can decide whether to purchase and cook them at home, choose the “ready-to-eat” take-away package, or consume one of the six regular dishes or three “daily specials” directly on the premises. The pasta dishes offered are traditional ones from throughout Italy, many of which are made from their own flour mix, Macinato Savuré: a combination of durum wheat from Apulia and soft wheat from Piedmont.





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Major recognition for the Pavan Group for commercial reliability

Cribis Dun & Brandstreet, a world leader in the credit information systems and business information sector, assigns a rating of 1 to Pavan for reliability in trade relations.

This prize, awarded to less than 6% of the companies analyzed, is the synthetic indicator of the size and the riskiness of a company. It is awarded on the basis of analysis of payment transactions, cash flows, payment trends and in general the financial soundness of the company.

Even in market comparison Pavan is an exception: the average rating for this sector, based on the analysis of about 1600 companies, is valued at level 3, while in the recent observation period (24 months), the value for Pavan has remained stable at level 1 (the highest).

This recognition further represents the reliability of the Pavan Group, increasing the confidence of suppliers, customers and stakeholders in establishing or strengthening mutually profitable and lasting relationships. (Press release)



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pasta in germany



Positive results are shown by the latest **data on pasta trends in the Germany**. Prospects are looking good for gluten-free pasta, whole wheat pasta and organic pasta.

Pasta experiences 3% growth in value terms and 1% growth in volume terms in 2013, according to Euromonitor International. Aside from the most established staples of potatoes and bread, pasta is the next most popular source of carbohydrates for meals in Germany, far ahead of more ethnic alternatives such as rice, noodles and couscous.

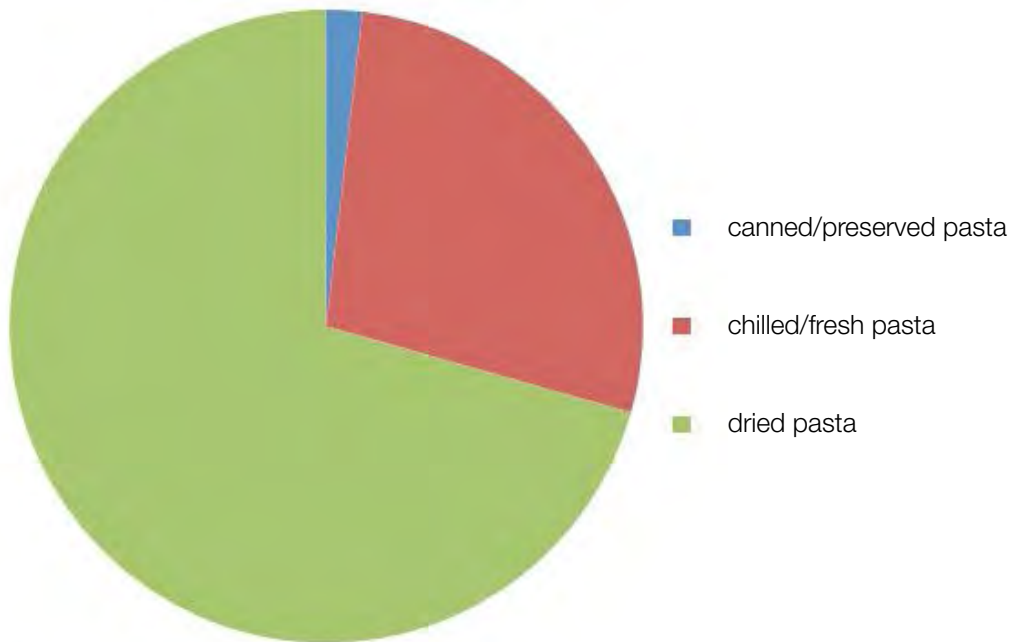
Sales of pasta benefit from its perceived convenience and healthy image. Chilled/fresh pasta posts the fastest growth in value terms as these products are considered to be the healthiest.

However, dried pasta is the most popular type of pasta in Germany, perceived as a convenient format with a long shelf life.

Private label reigned supreme in Germany throughout the review period. A lot of private label sales come from discounters' private label products. With German consumers' general preference for shopping in discounters and pasta's high volume sales, discounters have a good offering of private label pasta products in Germany.



Pasta in Germany. Retail value sales (2013)



In addition, private label is also gradually gaining more presence in supermarkets in 2013.

In order to compete with the low price strategies of discounters, with their private label products, pasta brands from manufacturers are placing more emphasis on their authenticity and regionality in 2013. German consumers appreciate brands showing either the Italian heritage of pasta products or the traditional origin and German manufacturing aspect.

The positive volume and constant value growth of pasta in Germany will mainly be driven by the steady showing of the most popular product, dried pasta, in the forecast period. Despite the maturity of the product, the healthier image of pasta compared to some other carbohydrate sources is likely to ensure slight volume growth during the forecast period. Slight price increases will also push up constant value growth ahead of volume growth, with the premiumisation trend through even healthier offerings of the products as well as potential price increases from rising prices of the ingredients.

As pasta in general is perceived as natural and healthy, the potential growth for even healthier variants within pasta, such as whole wheat, gluten-free or organic pasta is quite promising. Whole wheat pasta is predicted to profit from the increasing preference of consumers for healthier solutions, especially with increasing consumer knowledge of the benefits of whole wheat carbohydrate products on the whole.



goodness and goodwill: charity initiative supported by **ghigi**

Not only is it good for body and soul, but pasta can also “do” good. This was shown by the “Pasta della bontà” initiative through which a number of groups combined forces in support of the Lega del Filo d’Oro, a non-profit association providing assistance to the deaf and blind and others with multiple sensorial handicaps all over Italy. The project, in collaboration with Coldiretti, the Italian farmers association, and Ghigi pasta manufacturers, involved promoting the purchase of a kit of pasta, the proceeds of which would be donated to the charity. Partner in the program was the Fondazione Campagna Amica Coldiretti which invited the public to purchase the pasta kit (three 500 g packs of fusilli, penne and tortiglioni) in the stands found in the “Campagna Amica” farmers’ markets. Together with the pasta, “donors” also received a mini-recipe booklet with three recipes from celebrities Renzo Arbore, Marisa Laurito and Teresa Mannino. Also contributing were Terranostra holiday farms which included the “Pasta della Bontà” on their menus, and various multinationals made the initiative available to employees in their corporate headquarters. These initiatives were also accompanied by a competition on the web, the “Ricetta della bontà” recipe competition. First Prize: a cooking course at the Boscolo Etoile Academy in Tuscany.

pastificio gentile in milan and paris

The Pastificio Gentile recently took part in two major food and wine events. Specifically at the end of January and beginning of February when this Gragnano-based company took part first in “Cultur.AI” in the French capital, and subsequently in “Autoctoni – Anteprema per l’Expo”, held in Milan. In Paris, Gentile was chosen by the creator of Consortium Paris, Mauro Bochicchio, to represent Italian quality and defend and promote traditional local products and the short supply chain, together with farmers, producers, chefs and special guests. The event was held in the UNESCO building. In Milan, the event, organized by Ais Milano in conjunction with Luxurywines at the Westin Palace Hotel, was dedicated to tastings as a preview of Expo 2015.



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Elisa and Elena Martelli of Martelli pasta factory (Lari, Pisa, Italy) read Pastaria Quick News

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