

# professional PASTA



*The international magazine for Pasta Producers*

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ALIMENTARY PASTA**

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# The World is Changing: Pasta is Going to Be the Food Model of the Future

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Chances are pasta is going to make it. Most especially abroad, on the back of increased market shares and penetration in modernising countries as well as of its unscathed appeal in Italy, where the average per capita consumption is and remains the highest in the world (on average 26 kg per year between 2006 and 2009). Over the last decade, the Italian pasta industry, as shown by a survey carried out

by Nomisma, has distinguished itself for an exponential growth in production and turnover. From 1997 to 2007, the value of Made-in-Italy alimentary pasta grew from €2.5bn in 1997 to €6.1bn in 2007 (i.e. +144%) and gained momentum most especially starting from 2003. While this performance arose in particular out of the exceptional readiness of foreign markets to receive our products, also Italian initiative in



The maestro pastaio Giovanni Fabbri with his historical "implements" displayed at PastaTrend: here he is illustrating the artisanal pasta-making procedure to the Deputy Chairman of the EU Commission for the Rights of Women, Barbara Matera, to the Chairman of Cogeca, Paolo Bruni and to Marisa Laurito, Art Director of the Great Pasta Exhibition.





In 2009, pasta exports came to €1.8bn, accounting for 9% of Italian food exports in value terms.

9% of the value of Italian food exports. The trend for the future is therefore a promising one. And a major contribution to this also comes from PastaTrend, the first Exhibition entirely dedicated to the durum wheat and pasta industry that ran in Bologna from 24 to 27 April 2010, gathering 150 exhibitors, over 22,000 visitors and 329 Italian and foreign journalists. A unique opportunity that has favoured the coming together of buyers and professional players from 38 countries (and by the way many of these countries have confirmed purchase orders).

The potential of the tam tam of PastaTrend will continue at Expo Shanghai 2010, given that the Pasta Exhibition has been selected by the Emilia Romagna Region to represent the exhibition industry dedicated to food in this important world kermesse. Currently, according to the study carried out by Nomisma based on Un-Comtrade data, the German market is the one that absorbs the largest share of Italian exports (12.4%), followed by France (10.7%), the US (10.6%), the UK (9%), Japan (5.4%) and Canada (4.9%). However, there are several countries that might boost the amount of imported Italian pasta. Just think that Italy, in the ranking of the largest world consumers of pasta, is followed by Venezuela, with 13 kg per capita, Tunisia, with 11.7 kg, Greece (10 kg), Switzerland (9.4) and Sweden (9). Also, many other countries at all latitudes, are going through a deep change in food habits, which is related to the emergence of social classes with different consumer trends: this will probably be a major driver for exports of the very broad

6%. Worldwide, dry non-egg pasta accounts for approximately half of all international trade of alimentary pasta. A further 25% relates to cooked and prepared pasta (for ready meals), while a smaller proportion includes egg pasta neither cooked nor prepared (for ready meals), stuffed pasta and cous cous.

Italy is the largest player in this industry, with a share of 42% of international trade, which comes as no surprise if one considers the century-old legacy that Italy boasts with this specialty. However, some competitors are showing up. China, for example, follows Italy in terms of International trade (8%), with this trade being concentrated, however, almost exclusively in the segment of ready pasta meals and cooked pasta (China has a share of 22%, while Italy, for this category of SKUs stands at 8%). Regarding the type of pasta products in which Italy has a position of excellence, i.e. dry non-egg pasta, the main competitors are Turkey and the USA (with 4% and 3% respectively).

From 2004 to 2008, the Italian pasta industry, which comprises 6,000 enterprises (most of which are artisanal enterprises) and 30,000 workers, has been the real engine of exports, with a 60% increase (overperforming the industry by 6% as a whole in the same period across the world). Importantly, this industry plays a major role as part of the milling industry (almost 200 mills in Italy process the raw material, i.e. durum wheat) and a broad section of national agriculture, which is capable of producing, as happened in 2008, prior to the collapse of the price of cereals after their quick rally, over 5 million tons of durum wheat.