

**ATLANTE**  
— FOOD OF THE WORLD —

**GUIDE TO:**

**AMBIENT  
PASTA**



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## A HUNGER FOR AUTHENTIC PASTA

A hunger for authentic pasta Pasta is the quintessential expression of Italy's food culture and there's no doubt it has won the hearts of UK consumers too. Spag bol may be an Anglicised family favourite, but Brits are also hungry for authentic Italian pasta in which quality, taste and interesting shapes are key.

**In 2020, the UK retail market for ambient, or dried, pasta was worth more than £500m and had grown 15% by value year on year.**

Atlante prides itself on sourcing the best Italian products for export markets, and our pasta suppliers are 100% Italian. Some of these are based in Gragnano, home of the Protected Geographical Indication (PGI) protected Pasta Di Gragnano. This guide looks at pasta production and the pasta supply chain, how Atlante works with its customers and producer partners, opportunities and challenges in the UK ambient pasta market.



## WHY WORK WITH ATLANTE?

We're motivated by passion for our work and the ability to innovate, brainstorming side by side with our **partners to create winning products that interpret market trends and satisfy customer needs.**

Atlante is unique as we are neither an agent nor broker. We see ourselves as a value-adding link between retailers and producers. We do not represent producers and, being totally independent, use our expertise to identify the producers best suited to meet a customer's standards, requirements and expectations.

Our customers receive a **tailor-made, timesaving and cost-efficient package** of products and supporting services. The experience we have gained from working with highly professional, structured and demanding organizations, such as a leading UK supermarket chain, is an invaluable asset when it comes to assessing the strengths and weaknesses of producers.

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Pasta dough is squeezed through different 'dies', to create various shapes. Dies can be made from steel and coated with teflon. A Teflon die produces a smoother & brighter-looking pasta while a bronze die, is used for premium pasta, gives a more coarse, traditional finish that helps the sauce stick to the pasta.

# AMBIENT PASTA PRODUCTION

**Step 1: Mill durum wheat to make durum wheat semolina flour.**

- The term "durum" is from the Latin "durum" meaning hard; as it has a high degree of resistance to the milling process.
- Durum wheat is high in protein and gluten giving the pasta texture, flavour and structure.
- Durum wheat is the 2nd most cultivated wheat in the world but is only about 5-8% of total wheat production.

**Step 2: Add water to make a dough.**



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# AMBIENT PASTA PRODUCTION

## Step 3: Extrude the dough through the die.

- The dough is pushed through a die (or cutter template) at high pressure
- The dies are large circular, perforated, metal plates/ discs that shape the pasta; made from either bronze or Teflon.
- A bronze die gives the pasta a rougher texture and is often considered to give a more premium product.
- The Teflon die • gives the standard shop-bought pasta texture. These are more common and usually slightly cheaper as the Teflon die will last longer than the bronze die.

## Step 4: Dry the pasta

- The drying process is a science and is a mixture of temperature , time and humidity ☁



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# AMBIENT PASTA PRODUCTION

## Two simple ingredients

Ambient pasta is made with a mixture of durum wheat semolina and water. Once kneaded, the resulting dough is extruded through a 'die' to shape it.

Of the hundreds of different pasta shapes, the most popular in the UK include **fusilli, penne and spaghetti**. After being extruded the pasta is slowly dried in special ovens. This takes several hours as excessive heat would cause the pasta to turn dark and increase the likelihood of hairline cracks forming, which would cause it to break when placed in boiling water. At the end of the drying process, the pasta is shelf-stable, requires no sterilisation and has a shelf life of up to three years. In contrast to ambient pasta, fresh pasta typically contains eggs and does not undergo a drying process. It is pasteurised and, with a much shorter life than ambient pasta, must be kept refrigerated.



## OUR PRODUCTION PARTNERS

All Atlante partner producers are vetted and onboarded according to strict sustainable, ethical, technical, quality and safety parameters. The key criteria are that production sites are BRC certified, SMETA audited and work to SEDEX standards.

Our producers demonstrate reliability, capacity and experience with large retail customers (preferably international). All the producers Atlante works with have been manufacturing pasta for decades and there is little that can be taught to them in terms of how to make good pasta. What can often be improved is the overall efficiency and safety of the production process.

Atlante's input has helped improve producers' efficiency, safety and hygiene standards while increasing customers' awareness of the key attributes of high-quality pasta.



## WHEAT FOR QUALITY PASTA

While much of the durum wheat used for pasta is grown in Italy, the country's production does not cover all its demand and a varying amount of durum wheat is imported from abroad, dependent on the local crop.

**The most important sourcing market is Canada, responsible for more than 40% of the world's durum wheat exports.**

Like any crop, durum wheat is susceptible to the weather and 2021 proved to be a particularly difficult year, with a third of Canada's durum wheat harvest destroyed by the July heat wave. To help us evaluate and take mitigating action in the event of such adverse weather, Atlante has developed relationships with mills and grain dealers.



## WHEAT FOR QUALITY PASTA

Whilst working with our contacts in the industry and tracking the AGER index cannot totally insulate Atlante from the vagaries of adverse weather, draught or other phenomena, it puts us in a good place to evaluate and adopt mitigating actions when needed to provide the optimum solution for our customers.

**We track durum wheat semolina prices on the AGER grain index of the Bologna stock exchange. Indexes reflect market prices and give an indication of trends and, combined with industry insights, are a useful tool to help guide sourcing strategies.**

# AMBIENT PASTA SUPPLY CHAIN



1

Durum wheat is harvested in June/July in Europe and in August/September in North America.



2

Once harvested, durum wheat is stocked by farmers/traders, who supply it to mills.



3

Mills process the durum wheat by grinding it to transform it into semolina which is coarse flour.



4

Semolina is supplied to pasta producers. Some have their own mills, shortening the supply chain.

Not all durum wheat is the same. According to Italian law, pasta can only be made from durum wheat semolina.<sup>1</sup>

The key element in determining the quality of wheat is its gluten content. Gluten is the wheat's protein and the higher the content, the higher the elasticity and resistance to bite the pasta.

The minimum protein content set by Italian law for durum wheat semolina is 10.5%, but premium pasta brands hardly ever fall below the 13% protein threshold.

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1. Soft wheat flour can only be used for egg pasta. The use of soft wheat for non-egg pasta is permitted for own-label products destined for export and it is subject to specific authorisations: most pasta producers will neither use nor stock soft wheat flour in their production sites.

# ATLANTE'S GUIDANCE FROM ITALY TO THE UK

1

## Understand

We work with customers to develop a brief incorporating product quality, volumes, supply chain and ethical considerations.

2

## Find

We look at our existing producers and consider all of the potential producers who could meet the brief.

3

## Assess

We study the capabilities, strengths and weaknesses of the producers for achieving the objectives in the brief.

4

## Develop

We work with the producer to develop products to the sample stage, or develop projects to the business case stage.

10

## Review

We complete a post-implementation review to identify issues and future improvements.



5

## Select

We benchmark producer capability and then select suitable producers or projects to propose to the customer.

9

## Launch

We provide dedicated resource to support a successful product launch at point of change.

8

## Forecast

We collaborate with the customer to identify a joint forecast and order profile.

7

## Manage

We manage the project at all stages, from processing to packaging through to launch.

6

## Cost

We work with the customer and the producer to submit carefully considered and delivered costs.

# SHAPES MORE THAN MEETS THE EYE

Valentines Pasta



Easter Pasta



Crown Pasta



Football Pasta



Halloween Pasta



Christmas Pasta



# AMBIENT PASTA PRODUCT DEVELOPMENT

Passion and extensive experience enables Atlante to source exciting brand and own label pasta products in a range of shapes, tiers, sizes, packaging formats and recipes:



## Shapes

We supply long and short shapes from classics such as penne to the more unusual casarecce or mezzi rigatoni.

## Tiers

We can brief, develop, supply and manage across all product tiers, from entry to premium.

## Sizes

We produce pack sizes for retail ownlabel ranges including medium, large and extra large.

## Packaging

Packaging can be designed and supplied in formats including bags and boxes in a range of materials.

## Recipes

Recipes can be developed to cater for specific dietary demands such as free-from or high-fibre.

## Ingredients

Specialist pasta can be developed using grains including wholewheat, buckwheat, red lentil, green pea and brown rice.



## DIFFERENT PASTA SHAPES

Anyone trying to list all the pasta shapes produced in Italy would face a daunting challenge. Ambient pasta is usually described as either being 'pasta lunga' (long) or 'pasta corta' (short). Specific pasta types are best suited for specific sauces. Twist pasta shapes such as fusilli, trofie, strozzapreti, casarecce and gemelli suit lighter, smoother sauces like pesto that will cling to the twists, whereas long ribbon pasta shapes such as tagliatelle, pappardelle, fettuccine, mafaldine are best with rich, meaty sauces.

Approximately **70% of sales come from three shapes - fusilli, spaghetti and penne** - in various pack sizes (500g, 1kg, 3kg) and using various ingredients (semolato, core white semolina, wholewheat, organic, spelt, highfibre etc). A retailer's premium range allows for more adventurousness and features shapes such as conchiglioni (large shells ideal for pasta bakes), casarecce (short twists) or mezzi rigatoni (short rigatoni tubes).



## SPECIAL DIETS

Atlante supplies gluten-free pasta for retailer own label and under our Atlante brand Free-from pasta is made from a combination of yellow maize, white maize and wholegrain rice.

A 100% maize pasta is also supplied under the Atlante brand. Among the innovative products supplied by Atlante are legume-based pastas. Rich in protein, naturally gluten-free, tasty, healthy and versatile, the Red Lentil Penne and Green Pea Fusilli have been part of the retailer's private-label assortment ever since and have become a favourite with shoppers.

# UK AMBIENT PASTA MARKET

## UK Ambient Pasta Market Snapshot

Retail market value\*

# £500m

Value growth 2020\*

# +15%

The market is dominated by private label and, when it comes to brands, the leading ones are:

- Napolina
- De Cecco
- Barilla

\* Source: The Grocer Pasta & Pasta Sauces Category Report 2020



## PANDEMIC BOOM

Pasta consumption soared in 2020 during the covid pandemic. It is too early to say whether this will leave an increased appetite for pasta going forward, driving volumes long-term.

## HEALTHY EATING

This trend has many different connotations, with organic and free-from areas of increasing focus.



# CHALLENGES & OPPORTUNITIES

## KEY CHALLENGE Falling Prices

Although the pandemic drove a rise in Pasta sales, it's likely sales will remain stable.

Some consumers recognise quality and will pay for it others choose what costs less. In 2015 the average price of a pack of pasta was 90p since then now Aldi and Lidl are extremely popular, the value of the market is impacted without this being counterbalanced by an expansion of the market.

## KEY OPPORTUNITY Greater differentiation

Different pasta shapes bring opportunities to this category as the ranges offered by major UK retailers are all quite similar.

Most retailer ranges are focused on the more well-known shapes.

Removing some of the most obvious redundancies and substituting them with more 'exotic' regional shapes such as Apulian Orecchiette, Sardinian Gnocchetti or Long Curly Fusilli could add distinctiveness to a range, stimulate consumers' curiosity and, ultimately, bring back value.

**THANK YOU**

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