



NATIONAL PASTA
ASSOCIATION

2025 ANNUAL MEETING

March 16-18 | Omni Amelia Island Resort, FL

Welcome Back!





**Thank you To Our Sponsor For
Today's General Session**





Annual Meeting Agenda

Monday, March 17, 2025

Event	Time	Presenter(s)
State of the Industry	8:00am – 8:10am	Nora Stabert, Winland Foods
Regulatory Update	8:10am – 8:50am	Veronica Colas, Hogan Lovells
Culinary Trends – Consumers	8:50am – 9:30am	Chef Rosario, NPA & Suzy Badaracco, Culinary Tides
Break	9:30am – 9:45am	
1x1 Meetings	9:45am – 12:00pm	Kellen Staff
Lunch On Your Own	12:00pm – 12:30pm	
Golf Tournament	1:00pm – 5:00pm	Sam Stabert (Golf Chair)
Pickleball Tournament	1:00pm – 3:00pm	Kellen Staff
19 th Hole Event	5:00pm – 6:00pm	
Dinner On Your Own		

Kellen representatives are available to answer any questions



Annual Meeting Agenda

Tuesday, March 18, 2025

Event	Time	Presenter(s) & Organization
Looking to the Future: Innovation in Manufacturing and Food Safety	8:30am – 9:30am	Fatemah Zare, Northern Crops Institute
Break	9:30am – 10:00am	
Member Session & Billion Meals Update	10:00am – 10:15am	
Sustainable Packaging & Regulations	10:15am – 11:00am	Stefano Giusti, Policarta, Giovanni Frosini, Ricciarelli, & Lon Pschigoda, Inspired Fiber
Eat Pasta, Lose Weight? Healthy Diet and Innovating Foods for a GLP-1 World	11:00am – 12:00pm	Colleen Zammer, Bay State Milling
Lunch On Your Own	12:00pm – 12:30pm	
Bocce Tournament	12:30pm – 5:00pm	Kellen Staff
Closing Reception & Dinner	6:30pm	

Kellen representatives are available to answer any questions



October Celebration Of WPD & Largest NPA Event



Partnered with
Pastaria on media
coverage



120+ Attendees
From 7 Countries



53 Member
Organizations



3 New Member
Organizations



5 Guest
Organizations

Billion Meals Challenge:
the pasta community
leading the fight against hunger

Editorial team



**Shaping the future of
pasta: an interview with
Nora Stabert, president
of the National Pasta Association**

Editorial team



**A Miller's perspective
on World Pasta Day**

Editorial team



**Navigating Brazil's
pasta market: insights
and future outlook**

Editorial team



**A bright future for
pasta: Carl Zuanelli's
vision**

Editorial team



Upcoming International Events



**Pastaria Festival
Joins Ipack-Ima for
2025 Edition**
May 28-29, 2025
Fiera Milano Rho
Milan, Italy

World Pasta Day 2025 in Istanbul

Join the Pasta
Industry
October 23-26



Hosted by TMSD

Welcome to our New Members

- Pastabilities Pasta Company (Knoxville, TN)

Their mission is to make the best ***fresh, premium pasta*** you can find locally and support survivors of domestic violence by providing employment opportunities and resources to empower them to rebuild their lives and succeed.



- Rummo USA (New York, NY)

The history of Rummo starts in 1846 when Antonio Rummo began the art of milling wheat and soon after started to produce pasta. Today in its 6th generation, the Rummo's family have perfected and ***patented a method of making pasta, Lenta Lavorazione***® (meaning Slow Processing).



- US Durum Products (Lancaster, PA)

US Durum grows their ***couscous product*** offering into a symphony of delectable couscous, short-cut pasta, quinoa, rice, and Mediterranean blends.



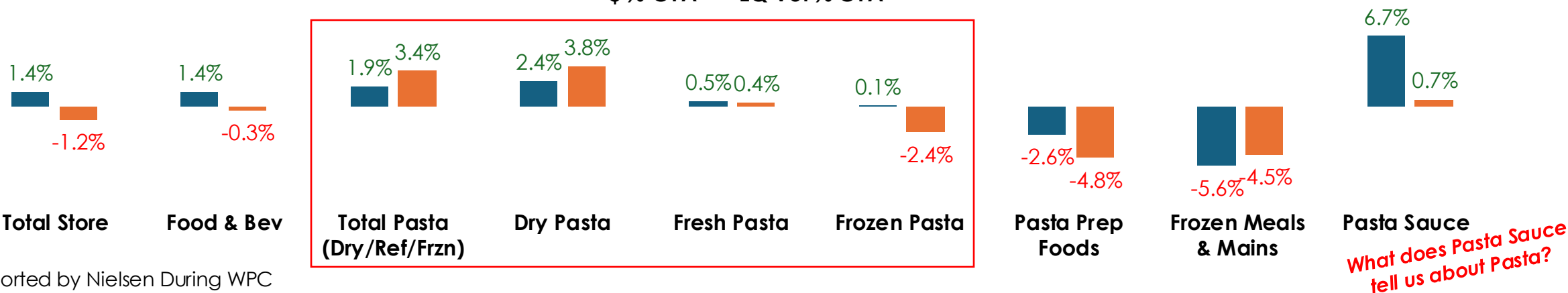


Industry Update

Growing Category Across \$ And Volume – Outpacing Total Store And F&B, Driven By Dry Pasta

NIQ Dollar & Volume Performance Comparison: L52W vs. Year Ago

■ \$ % CYA ■ EQ Vol % CYA



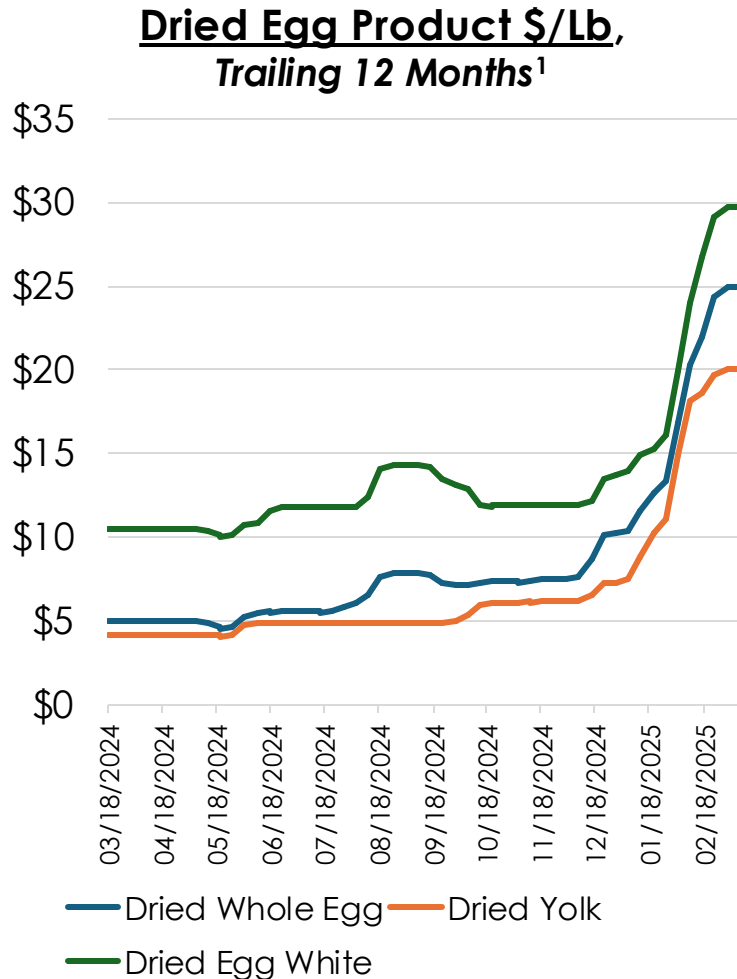
PLMA Rank Report (Edible), CY2024

Product	Private Label				National Brand				All National & Private Brands			
	\$ Sales	\$ YoY	Unit Sales	Unit YoY	\$ Sales	\$ YoY	Unit Sales	Unit YoY	\$ Sales	\$ YoY	Unit Sales	Unit YoY
Pasta	\$1,021M	6.2%	713M	8.6%	\$2,218M	0.7%	1,061M	1.8%	\$3,238M	2.4%	1,774M	4.4%
Noodles	\$101M	0.8%	53M	7.3%	\$248M	-2.9%	81M	-5.8%	\$349M	-1.9%	134M	-1.0%
Spaghetti / Macaroni / Pasta	\$920M	6.9%	660M	8.7%	\$1,969M	1.2%	981M	2.5%	\$2,890M	2.9%	1,640M	4.9%
Dry Mac & Cheese Mixes	\$279M	8.4%	186M	4.5%	\$1,285M	-1.2%	454M	-3.3%	\$1,565M	0.4%	641M	-1.2%
Pasta – Refrigerated	\$140M	5.2%	25M	5.4%	\$468M	0.9%	80M	0.7%	\$609M	1.9%	105M	1.8%
Pasta – Frozen	\$177M	7.5%	39M	3.5%	\$317M	-0.3%	69M	-2.6%	\$493M	2.3%	107M	-0.5%

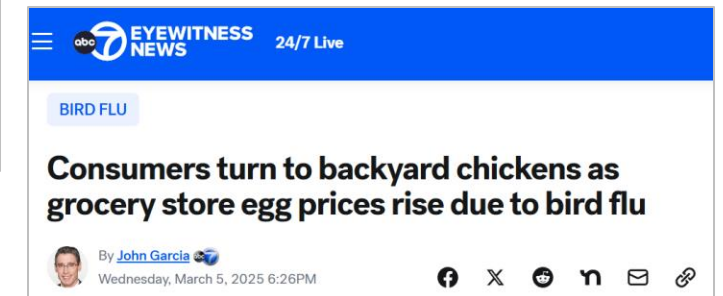
Source: 1. NIQ RMS Total U.S. xAOC, 52 w/e 9/7/2024 vs YA. Total Store = All Depts ex Bulk Bin, Floral, Gen Merch. Total Pasta = Dry + Refrigerated + Frozen, 2. PLMA Rank Report (Edible), CY2024.

Industry Update: Eggs

HPAI Driving Record Egg Prices– Key Input For Manufacturers



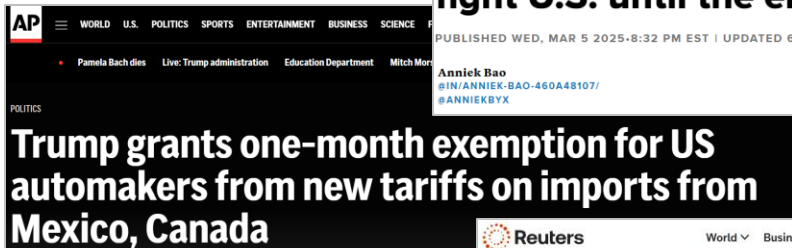
Source: 1. Urner Barry



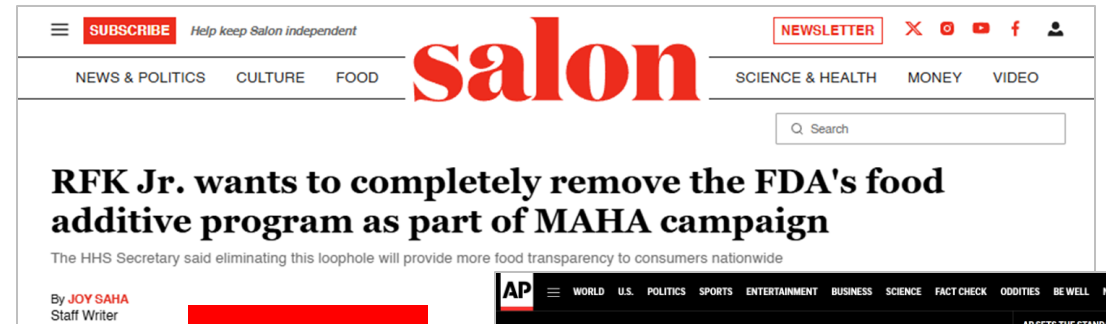
Industry Update: Regulatory

Hogan Lovells Will Update
On Regulatory
Environment Next!

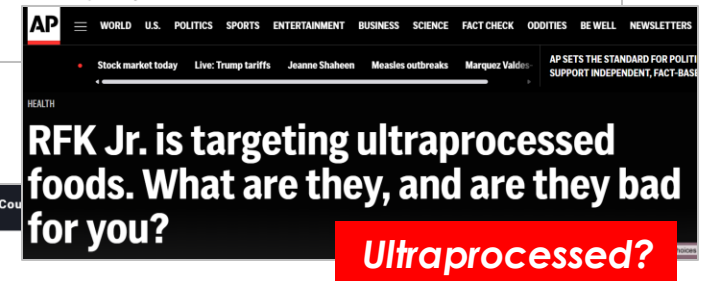
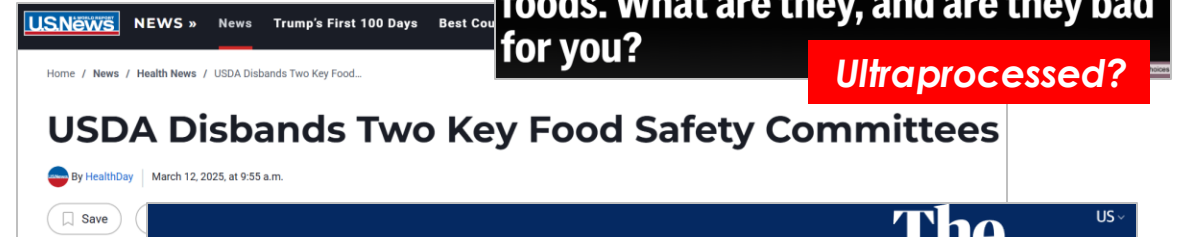
Global Supply Chains Preparing To Be Affected By Tariff Uncertainty



Admin Dynamics May Influence Pasta Industry (e.g., Consumer Category Sentiment, Formulations)



Red No. 3?



Ultraprocessed?



Industry Update: Trends

Trend Backdrop Favorable For Pasta Growth And Innovation

Supply Chain Impacts On Product



- Expected tariff impacts on **raw material costs**
- Focus on maintaining **stable supply** by sourcing more **locally**
- **Immigration impacts on labor**



Global Flavors Driving Innovation



- Increasingly diverse population paves way for **flavor mashups**
- Desire for new / authentic **cultural experiences**
- **Social media** influence / virality – **Travel**-influenced



Packaging As Differentiation



- Opportunity to set a company apart / create brand loyalty
- **Sustainability** (e.g., recyclable, reusable)
- **Convenience** (e.g., microwavable pouches)
- **Premiumization** driven by “little treat” culture



Food As Medicine



- Rise of GLP-1 medications changing consumer diet requirements
- Focus on nutrient intake (e.g., protein, net carbs)



We'll hear more about packaging innovations and winning in the GLP-1 World on Tuesday!

Industry Update: Climate

Sustainability – Genuine Commitments Or Keeping With The Trend?

AgFunderNews

Consumers have heard of regenerative agriculture. What will convince them to actually buy it?

February 21, 2025 | Jennifer

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Electro-Agriculture: A Novel Method Allowing Plants to Grow in the Dark

MARCY KREITER | OCTOBER 31, 2024



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Naturally Confused: Natural, Organic Terms Puzzle 40% of Consumers

KELLY BEATON | FEBRUARY 28, 2025



AGRICULTURE DIVE

Deep Dive Topics

Q&A

How food companies can accelerate the regenerative agriculture transition

Major CPGs and ingredients companies will need to act now if they want to meet their 2030 targets, says HowGood CEO Alexander Gillett.

Published Oct. 30, 2024

NYU Stern

Wall Street Journal: Food Companies Show How Sustainability Investments Can Reap Positive ROI

Sustainability investments aimed at decarbonization, protecting nature, and contributing to risk mitigation strategies often generate positive ROI.

Jun 25, 2024



The Food Institute

Sustainability, Innovation Take Center Stage at Gulfood 2025

The Gulfood 2025 event in Dubai emphasized the urgent need for sustainable global food systems. The event also showcased innovative...



Nation's
Restaurant News

REGISTER

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Operations Technology Segments Finance Menu Trends Insights Multimedia Resources

Waste Not, Want Not: How restaurants are tackling food waste

Innovative ways restaurants are saving money and the environment



Jose Chaves

February 20, 2025

6 Min Read

Nation's
Restaurant News

NPA Committees

NPA Committees Driving Critical Workstreams – Participation And Input Encouraged

Stakeholder Engagement Committee



Chair:
Michael Goodman

Membership Committee



Chair:
Tom Quinn

Regulatory & Technical Affairs Committee



Chairs:
Tom Quinn
Alexis Freier-Johnson

Research & Education Committee



Chair:
Renee Mellican

Finance Committee



Chair:
Jim Meyer

Responsibilities:

- Strategic marketing plan
- Engage media outlets, lead PR, social

- Member retention & recruitment
- Philanthropic efforts
- Annual Meeting

- U.S. legislative & regulatory monitoring / response
- Industry coalitions

- Educational webinars
- Nutrition research & technical programs

- NPA financials
- NPA budget

Board of Directors

Executive Committee Slate 2025-2026

Nora Stabert
Winland Foods

Chair

Esteban Abascal
La Moderna/Interamerican Foods
Corporation

Vice Chair

James Meyer
Italgrani USA

Treasurer

Melissa Tendick
Barilla Americas

Secretary

Sponsors



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Gold



Silver





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ASSOCIATION**

Thank You & Enjoy the Meeting!