



**NATIONAL PASTA
ASSOCIATION**

2026 Annual Meeting

PLANT to **Plate**

March 15-17, 2026

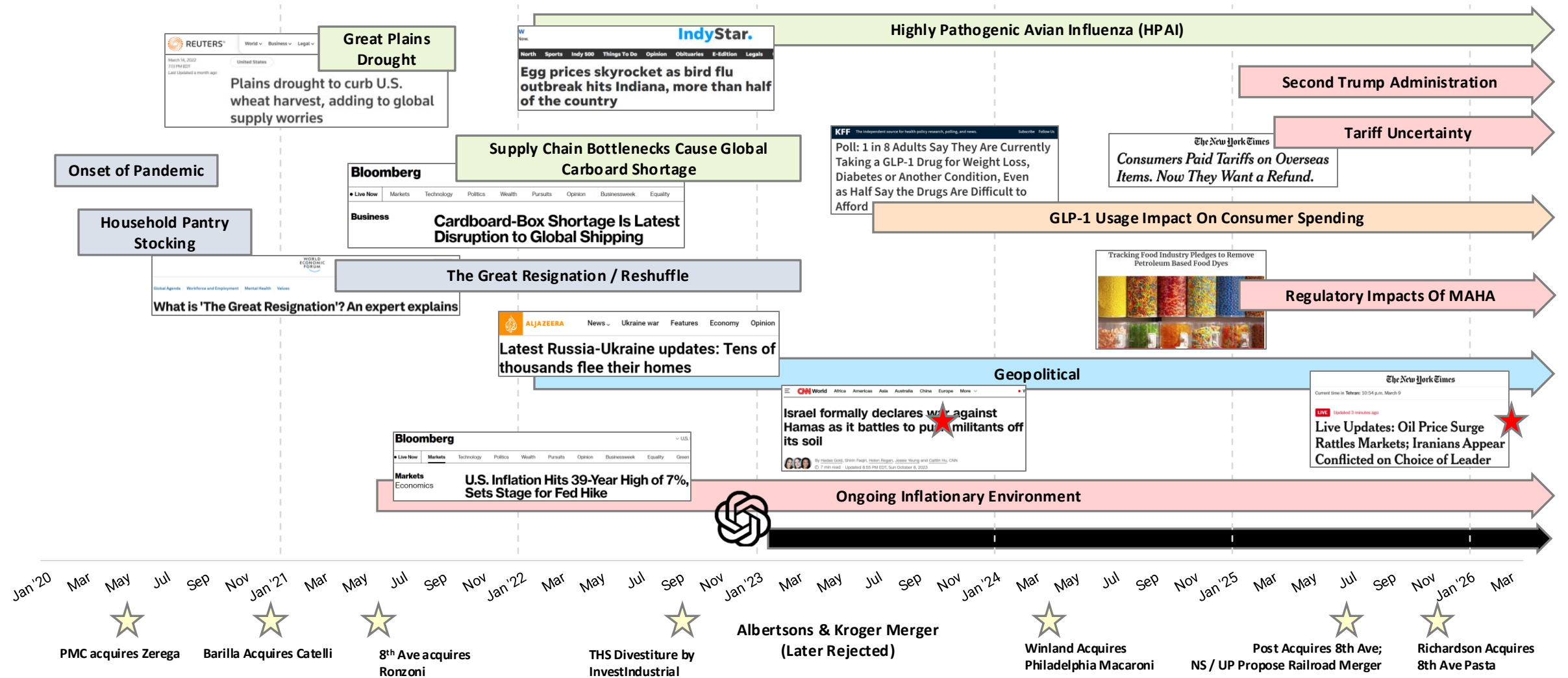
The Westin Savannah Harbor • Savannah, Georgia



Thoughts On The Industry

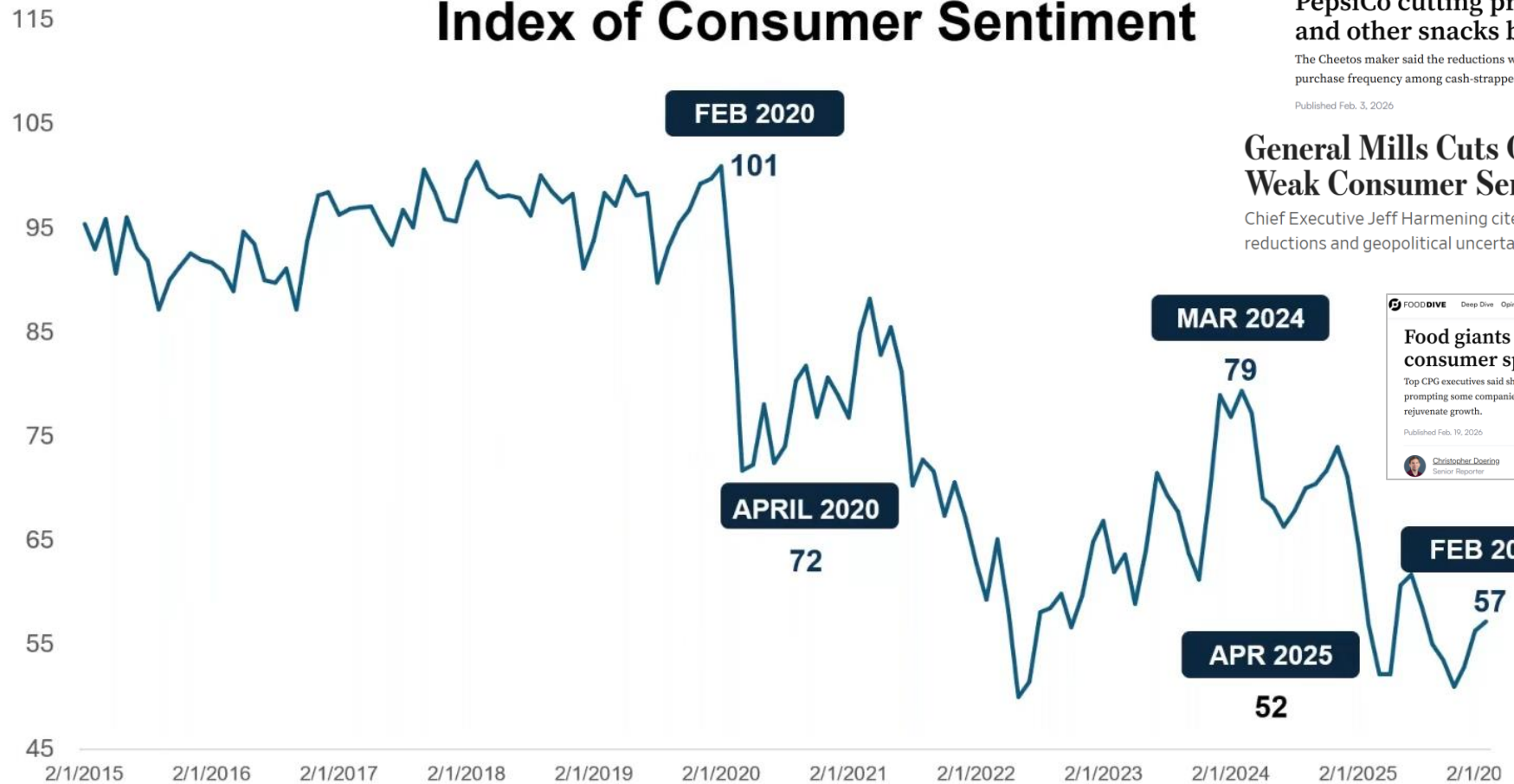
Pasta's Return To "Normal" Still Feels Highly Dynamic

2020 – 2026 Market Dynamics



Evolving Food & Beverage Landscape

Index of Consumer Sentiment



PepsiCo cutting prices on Doritos and other snacks by up to 15%

The Cheetos maker said the reductions will "improve competitiveness" and boost purchase frequency among cash-strapped consumers.

Published Feb. 3, 2026

General Mills Cuts Outlook Due to Weak Consumer Sentiment

Chief Executive Jeff Harmening cited inflation, SNAP benefits reductions and geopolitical uncertainty for consumer stress

FOOD DIVE Deep Dive Opinion Library Events Press Releases Topics

Food giants cast a sour mood on consumer spending in 2026

Top CPG executives said shoppers haven't returned at the rates they expected, prompting some companies to roll back prices and prioritize innovation to rejuvenate growth.

Published Feb. 19, 2026

Christopher Doering
Senior Reporter

Share License Add us on Google

Economy

Economic uncertainty weighing on mind of the consumer

Economic Update

Alex Chausovsky –
Business Strategy
Advisor

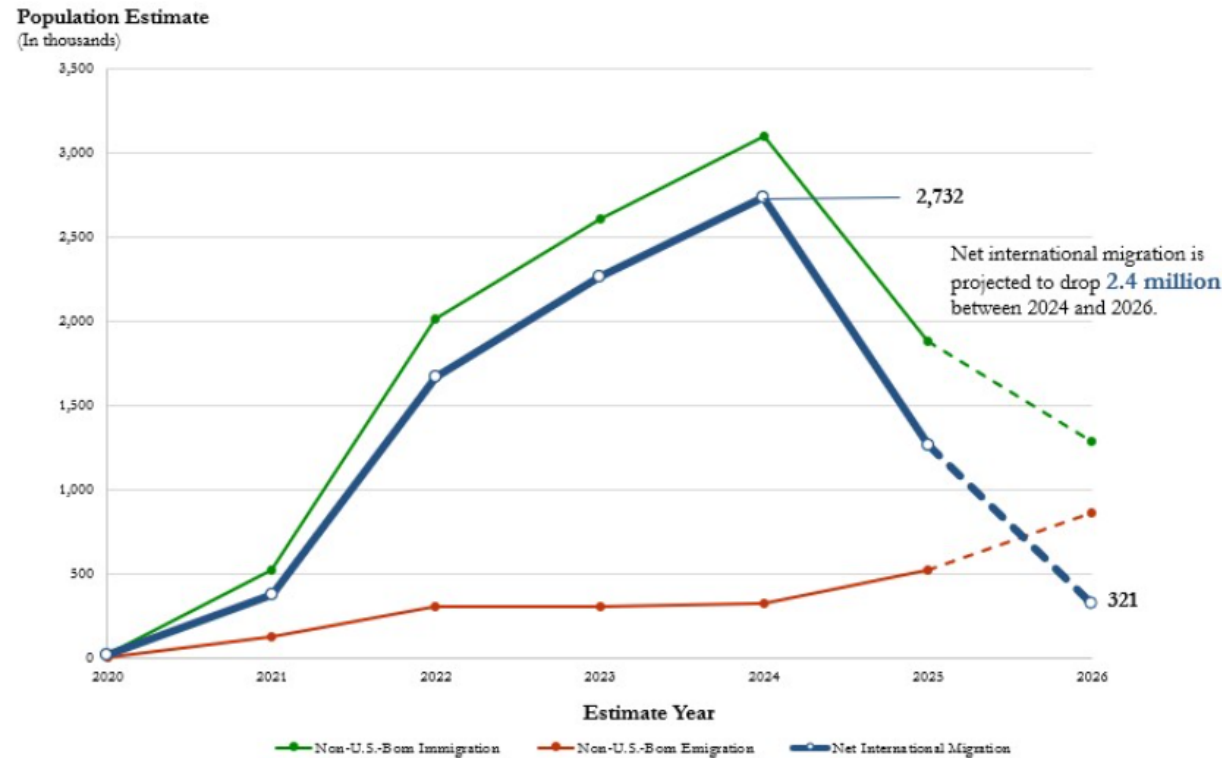
Source: University of Michigan

Dedicated Agenda:

Evolving Food & Beverage Landscape

NIM Decrease in Immigration & Increase in Emigration

Figure 1. Estimates of Net International Migration Components: 2020 to 2026



Note: The dashed line from 2025 to 2026 indicates a projection.
Source: U.S. Census Bureau, Vintage 2025 Population Estimates.

Source: Census, NYTimes, Econofact

Falling US Birth Rates



- Half of all 30-year-old women are childless as women delay motherhood
- Sharp declines in the birthrate among women in their 20s. At the same time, women in their early 30s (30 to 34) are now the group with the highest birthrate

Demographics

Population trends with potential to impact workforce and GDP


Economic Update

Alex Chausovsky –
Business Strategy
Advisor

Dedicated Agenda:

Evolving Food & Beverage Landscape

GLP-1S



Weight loss drugs in use today with potential to grow in penetration

Dedicated Agenda:

Consumer Impacts

Emily Boyd –
Nielsen IQ

- GLP-1s are in use today and expected to grow

 **The Washington Post** Sign in

Health Health Care Medical Mysteries Science We

Why it's easier and cheaper for you to buy GLP-1s

Patients paying cash and strong competition have brought down prices for GLP-1s, a rarity in the pharmaceutical industry.

March 12, 2026


What is GLP-1 Microdosing?

An endocrinologist explains the off-label practice of “microdosing,” how it works, and the potential health risks.

4 Min Read • Published February 20, 2026



- It is expected that GLP-1s will have an impact on food, but how is still up for debate?

 **Reuters** World Business Markets Sustainability Legal More

Lindt says weight-loss drugs users are eating more chocolate, not less

By John Revill and Danny Callaghan

March 10, 2026 4:11 AM EDT · Updated March 10, 2026



Source: Food Institute, JP Morgan, FoodNavigator, Reuters

Evolving Food & Beverage Landscape

Regulatory / MAHA



Dietary guidelines, food ingredient bans, UPFs and more...

Legislative Update

Veronica Colas – Hogan Lovells

Dedicated Agenda:

Consumers turning to naturally sourced colors



KALSEC

Tracking Food Industry Pledges to Remove Petroleum Based Food Dyes




A National Effort to Make America Healthy Again

Harvard Health Publishing
HARVARD MEDICAL SCHOOL

Common Conditions Staying Healthy Resources

What are ultra-processed foods and are they bad for our health?



IFT IFT.org

RFK Jr. Defends New Dietary Guidelines for Americans at Meat Conference

Robert F. Kennedy Jr. defended the newly released Dietary Guidelines for Americans, including an "inverted pyramid" model, during remarks at...



Protein, Dairy & Healthy Fats

Vegetables & Fruits

Whole Grains

Evolving Food & Beverage Landscape

Supply Chain



Industry focus centering on supply chain

Geopolitical Impact On Supply Chain

 Reuters

Iran war deprives US farmers of affordable fertilizer as spring planting looms

1 day ago



 The New York Times

Despite Trump's Claims, Grocery Prices Are Rising

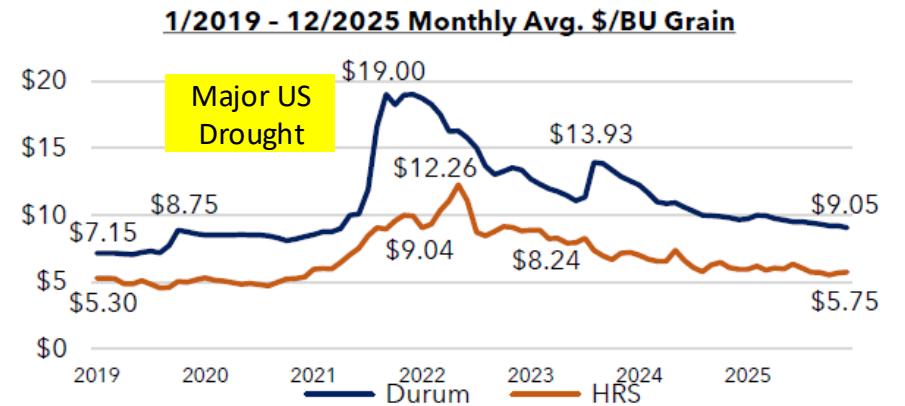
Weather, supply, tariffs, labor and changing consumer habits continue to drive up the cost of groceries. President Trump falsely claims...

Jan 14, 2026



Key Inputs Critical Industry Lifeblood

Durum (Sosland) & Hard Red Spring (MGEX)



Dedicated Agenda:

Durum Update & Topics in Sustainability

James Peterson – ND
Wheat Commission;
David Boehm – (NCI,
Moderator)

UPDATE

Evolving Food & Beverage Landscape

Consumers turning to naturally sourced colors



KALSEC

Tracking Food Industry Pledges to Remove Petroleum Based Food Dyes



A National Effort to Make America Healthy Again

Harvard Health Publishing HARVARD MEDICAL SCHOOL

Common Conditions Staying Healthy Resources

What are ultra-processed foods and are they bad for our health?

Regulatory / MAHA

Dietary guidelines, food ingredient bans, UPFs and more...

Legislative Update

Veronica Colas – Hogan Lovells

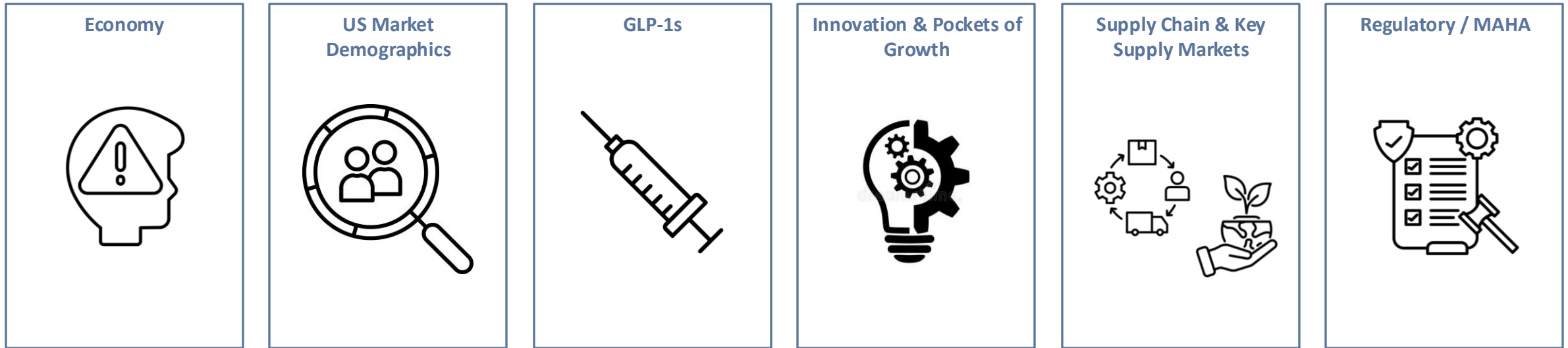
NPA supporting Grain Foods Foundation XXX Effort

TBU....

In addition, the NPA board Hill Day initiative in process to advocate for the industry and protect against serious potential impacts from on on-going regulatory activity

Dedicated Agenda:

Macro Dynamics Front Of Mind For Industry



Economic Update

Consumer Impacts

Executive 1x1s

Durum Update & Topics
in Sustainability Panel

Legislative Update

Alex Chausovsky – Business Strategy
Advisor

Emily Boyd – Nielsen IQ

James Peterson – ND Wheat
Commission;
David Boehm – Northern Crop
Institute (Moderator)

Veronica Colas – Hogan
Lovells

What does this mean for our industry?

Dedicated Agenda:

Stable Industry With Pockets Of Growth

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
Dry Pasta	\$1,043M	0.7%	724M	0.1%	\$2,246M	1.4%	1,066M	1.0%	\$3,288M	1.1%	1,790M	0.6%
Noodles	\$105M	3.4%	54M	-0.6%	\$253M	1.6%	80M	-0.9%	\$358M	2.1%	134M	-0.8%
Macaroni / Pasta	\$937M	0.4%	670M	0.2%	\$1,993M	1.3%	987M	1.1%	\$2,930M	1.0%	1,656M	0.7%
Single Serve Dinners	\$194M	-4.4%	106M	-3.1%	\$2,546M	-1.5%	962M	-3.8%	\$2,740M	-1.7%	1,068M	-3.7%
Prepared Pasta Dishes	\$22M	-13.2%	17M	-19.3%	\$564M	-3.0%	348M	-5.4%	\$586M	-3.4%	365M	-6.1%
Dry Packaged Dinner Mixes	\$304M	-4.0%	202M	-2.8%	\$2,080M	0.5%	888M	2.2%	\$2,385M	-0.1%	1,090M	1.2%
Dry Mac & Cheese Mixes	\$271M	-4.0%	183M	-2.8%	\$1,302M	2.0%	472M	4.7%	\$1,573M	0.9%	655M	2.5%
Pasta – Refrigerated	\$163M	11.6%	29M	9.7%	\$469M	0.1%	81M	1.5%	\$632M	2.8%	110M	3.5%
Pasta – Frozen	\$196M	6.0%	40M	1.8%	\$321M	1.9%	67M	-0.9%	\$517M	3.4%	108M	0.1%

Source: PLMA Rank Report, TTM February 2026