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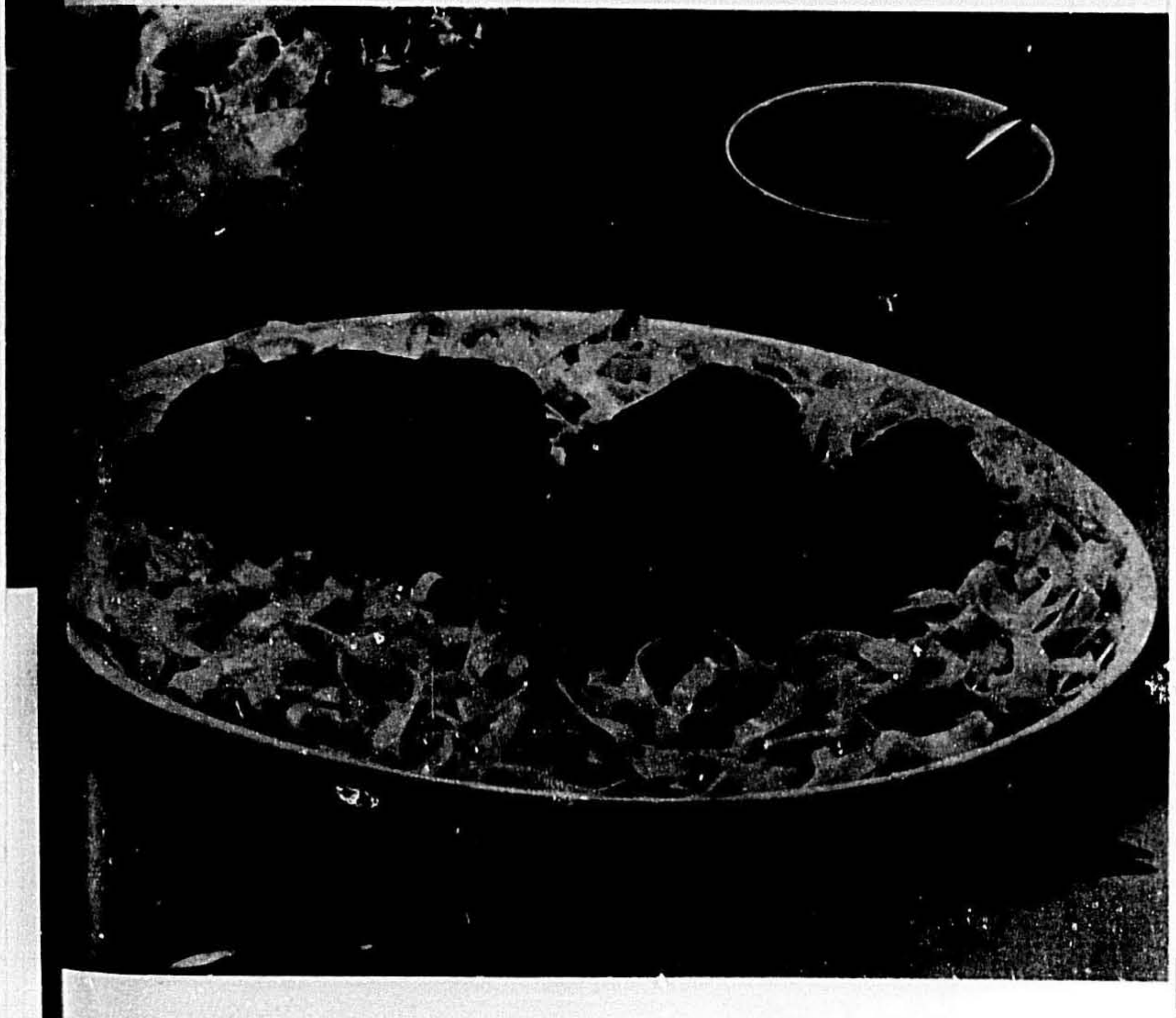

Noodles Saffron Perk Up Winter Menus

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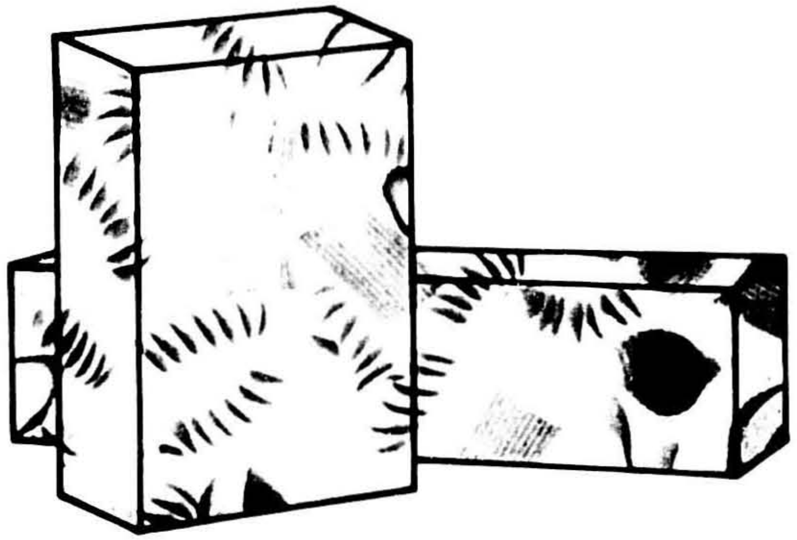

The Macaroni Journal

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February
1982

Officers

[illegible]

In This Issue:

[illegible]

Directors

[illegible]

National Pasta Association Selects New Logo

[illegible]

WINNERS AND LOSERS

1981 was a bummer [illegible]

Imports on Rise

[illegible]

Winners and Losers

(Continued from page 3)

This is not a new phenomenon. After the rust epidemics in the 1950's imports took advantage of the lack of quality raw material. From 1952 to 1954 Italian imports doubled from under 1,000,000 lbs. to over 2,000,000 lbs. What is new this time is the documentation of subsidies by the Common Market, not only in the case of pasta but flour as well. And the problem is one hundred times larger in volume.

The National Pasta Association through its Washington counsel has filed a petition with the U.S. Trade Representative complaining of this unfair competition. The press has picked up the controversy and the tide seems to be running our way.

Poor Milling Year

The durum millers had a poor year. Mill grind through the first ten months of 1981 stood at 23,038,000 bushels compared to 28,432,000 a year ago, a ten percent decline. However, durum milling capacity is increasing with the latest announcement being Peavey's new project at Tolleson, Arizona with a 3,000 cwt. daily capacity for durum products.

Joe Watson, general manager of Arizona Grain Inc., predicted at the Durum Forum that Arizona durum acreage would be down in 1982 if the price were under $4 per bushel. "Water costs too much and growers will turn back to cotton," he said.

Top grade durum has been bringing $4.75 in Minneapolis since mid-August but that includes freight from the interior of North Dakota and not too much coming in was top quality. So the farmer is in a pinch with his prices down as much as $3 a bushel since the first of the year and his costs up — particularly interest rates.

There may be diversion of acreage from wheat to more sunflowers and beans if relationships do not improve by planting time.

Eggs Steady

Egg output in 1981 will be about the same as 1980. Unfavorable profit margins have caused producers to reduce the number of replacement pullets, but producers have held on to their old hens longer. Prices didn't change much. The low point for Central Nest Runs was $11.10 to $12.30 in early May; the high $15 to $16.80 in mid-November. Frozen whole eggs were cheap as 39¢ in early May; as high as 56¢ in November. Dried yolks were $1.66 in May; $2.36 in November.

Corrugated Flat

Corrugated industry shipments for the first three quarters of 1981 have been virtually flat according to the Fibre Box Association. Thomas J. Muldoon, Executive Vice President, stated: "We just limped along with each month and each quarter being about the same as the period before. But with volume for the first three quarters up more than 3%, we really shouldn't knock it."

Pasta sales have not done as well. They were up about 2.5% for the first ten months of 1981, with most of that gain in grocery and industrial sales. Sales to government and food service were down.

Revolutionary Changes

The industry made revolutionary decisions at the annual meeting at La Costa. They changed the name of the Association from National Macaroni Manufacturers Association to National Pasta Association to broaden its scope and potential. It adopted a strategic five-year plan and set up a new organization structure with thirteen committees and five councils. These councils will hold deliberations at the Winter Meeting at the Breakers, Palm Beach, Florida, February 28-March 3, setting up budgets and programs that will be finalized for the next fiscal year beginning September (or possibly October — this is to be discussed).

The purpose of the National Pasta Association is

- to serve all phases of the industry by promoting the development and use of pasta and related products for the benefit of consumers; and
- to serve pasta manufacturers and related industries by providing programs and services that will enhance their efficiency and effectiveness.

General Objectives:

- Consumer Affairs . . . to promote the increased sale and use of pasta and related products, to provide consumer education concerning the value, nutritional and other aspects of pasta, and to maintain good trade relations.
- Government Affairs . . . represent the pasta industry before the executive, legislative, and judicial branches of government and to monitor, analyze, and disseminate legislative and regulatory information.
- Technical Affairs . . . to develop and support activities designed to improve the technical, standards, research and nutritional aspects related to all phases of the pasta industry.
- Internal Affairs . . . to attract and retain members, to effectively manage the communication, information, and meetings of the Association and to develop education and other programs focused on the operational aspects of the pasta industry.
- Industry Advisory . . . to coordinate activities with and receive input and guidance from producers, processors, and end-product manufacturers on industry-wide issues and concerns.

A doubled dues schedule should enable us to meet these objectives and turn the pasta sales curve upwards.

PASTA PROMOTION

Look at what pasta product promotional fees have purchased since the LaCosta Convention. Just think what the publicity can be when input is doubled!

Stressing the theme "Eat Light with Pasta", coverage extends from magazines where we have had our share of cover stories to color pages and weekly food sections in newspapers across the country. Television and radio are into the act for pasta publicity, the story is being told through leaflets distributed in supermarkets, trade publications are passing the word, and the foodservice field is getting more and more play as the pasta story gets around in specialized magazines for that field and interest in "A Pasta Foodservice Manual" grows.

Cover Stories

We were the cover story in the August Weight Watchers Magazine with the heading "Our Cold Pasta Salads: Low-Cost, Slimming, Elegant." The story title: "Cold Pasta Classics: Beyond Macaroni Salad" heads copy that reads "In fancy gourmet shops

(Continued on page 6)

At North Dakota Mill, there are many factors that make it one of the top mills in the nation. The world's finest durum wheat is milled with the most modern milling equipment. Superior laboratory and testing facilities assure you of quality control. And, one of the greatest contributing factors is teamwork. Everyone at North Dakota Mill works together to insure the highest level of quality production.

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Because at North Dakota Mill, we deliver teamwork.

Shown below are three of the North Dakota Mill people working together on some common goals. Left to right: 'Skip' Peterson, Leo Cantwell and Howard Berg.

the durum people

NDM

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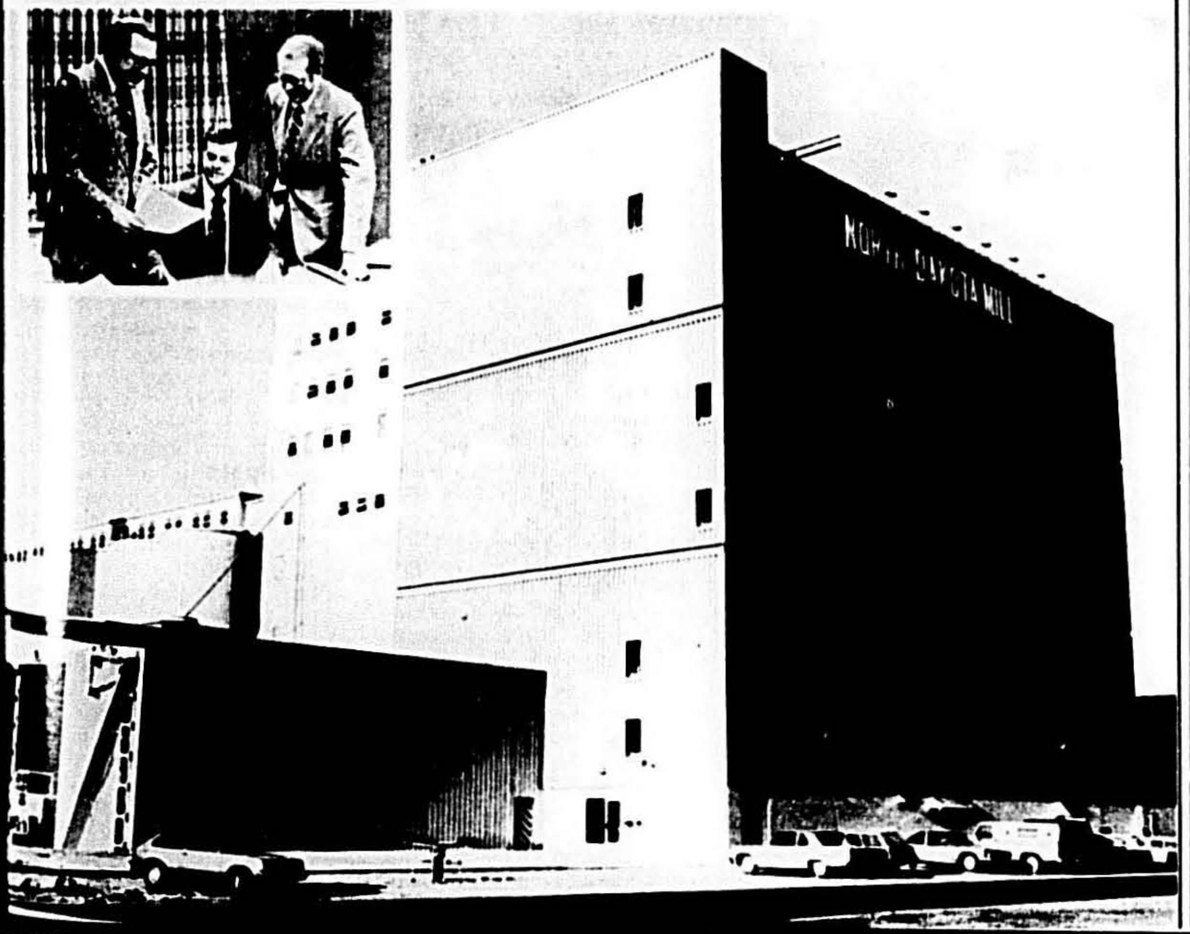
We Deliver Teamwork.



Pasta Promotion

(Continued from page 4)

these elegant cold pasta salads might cost as much as $8.00 a pound. But you can prepare slimming-yet satisfying meals for pennies a plate." A double page color spread showed three pictures and recommended 10 recipes. That same month we were also the cover story for Family Circle which told of "16 Full-color Recipe Cards for All-Time Favorite Foods." Linguini Primavera was shown in color on the cover. "Easy Main-Dish Summer Salads" titled a story that opened with a full-page color photo of Chicken and Rotelle Salad with Pesto Dressing. Circulation for these two magazines is more than 8 million.

We hit the cover again in September with Good Housekeeping's story on the Big Roast Cookbook where pasta was featured in a double page color photo of Northern Italian Meat Sauce. In the August issue pasta appeared in the 30-minute entree feature that stated: "Family fare at pennies a serving: tender bow-tie pasta drenched in a creamy tuna sauce delicately flavored with pimiento." Good Housekeeping's circulation is 5 million. We were also featured in two August issues of Woman's World magazine, and Family Circle recommended green noodles with tomato sauce in a color photo and recipe in a story on "Fabulous Meals that are Good for you."

Color Pages

The thrust of publicity in Newspaper color pages was pasta salads, but the Ft. Myers News Press in August quoted Robert M. Green in a "A Pasta Primer" about consumption, nutrition, manufacture, and shapes varieties. It has a circulation of 60,000. In August the Buffalo News asked: "What's all the excitement about pasta these days?" Certainly the starchy stuff is this year's "in" food. Cold pasta, hot pasta, pasta with fresh tomato sauce, pasta with vegetables — the list could go on forever. What's more, it probably does. Titled "Playing Up Pasta (That's Using Your Noodle!)" the story was illustrated with a full-page color photo by Five-Cheese Spaghetti and featured three additional recipes. Circulation is 221,687. The Los Angeles Times in August pointed up ease of preparation, low calorie and economy advantages of pasta in entertaining menus with three photos and six recipes. Circulation is 1 million. Macaroni and vegetables were featured in Atlanta, Dallas, Boston, Houston. The Birmingham News in October asked "Who Says You Can't Cook Fast Foods at Home?" Macaroni and Cheese was featured. Grit has been a steady promoter of pasta products and in October it ran two stories: Egg Noodle Chowders Rate High in Taste" and "Greek Cuisine for Your Dining Pleasure" featuring Greek-style chicken and spaghetti with photo and recipe. Circulation is 879,908.

The general trend of newspaper food page submissions has been that pasta is good hot or cold, that pasta mixes well with vegetables, that there is no need to give up pasta if you are dieting — "Eat Light with Pasta."

Foodservice Field

As emphasis has been increasing in the foodservice field, so have placements in important foodservice magazines. An article in Restaurants and Institutions featured Pasta Shrimp Salad that showed how versatile pasta can be mixed with frozen food. Fast Service Magazine played up Pasta's adaptability to microwave cooking. A full page was given to pasta ideas extracted from our new recipe card set that includes microwave directions. Copy emphasized pasta's low cost, low calorie advantages, flavor and versatility. How pasta dishes can be prepared in advance and reheated in the microwave, greatly increasing operating speed, was emphasized in this major trade publication with a circulation of 50,000 covering 233,386,500 meals per day.

In a case history done at Fiorella's Restaurant, New York City, Food Service Marketing in November highlighted Pasta Paella as a main course item in full color. The chef at the pasta station there makes pasta to order as it is touted as a menu item with great versatility that can command a high ticket at a low food cost. Circulation of this magazine is 106,689 covering 32 million meals per day.

Look for pasta features early in 1982 in Foodservice Marketing, Cooking for Profit, and Restaurant Hospitality.

Another feature of the foodservice arm of product promotion was attendance at the International Foodservice Editorial Council Conference in Williamsburg, VA where editorial relations were created and reinforced for presenting story ideas for 1982 placements. Much interest was expressed for use of pasta as a low-cost, low calorie food item.

Since the meeting in LaCosta 33 requests for the 6-card recipe sets from schools and institutions have been filled, and 132 orders for A Pasta Food-service Manual received. In addition, the availability of the manual has been featured in Cooking for Profit, Fast Service, Canadian Hotel & Restaurant, Restaurant Businesses, and Lodging and Foodservice News.

Special Projects

Special Projects included Pastaville II which was headlined in a major UPI story with potential circulation of 30 million: "City in Wheat Belt Plans Pastalympics." At the 15th annual Family Reunion, September 16, pasta manufacturers hosted magazine editors representing women's interest, romance, ethnic, youth and sports publications as well as editors of newspaper syndicates and cooking school directors. "Eat Light with Pasta", newly published industry leaflet, was incorporated in the press kit and descriptive release with a story describing the menu and foods served, announcement of the name change to the National Pasta Association.

In Canada

Canadian product promotion has included magazine and newspaper coverage as well as regular radio spots. A long sought placement was a spread in Epicure Magazine for July and August. Newspapers with a total circulation of 10 million carried articles ranging from carbohydrate loading with pasta by a marathon runner to cooking tips from a Chicago restaurant and advice on pasta quiche for seniors. CHNS radio, Halifax, discussed the following topics: dessert pasta; pasta on a diet; budget stretching with pasta; pasta in international cuisine; pasta in the microwave. A weekly telephone interview included these topics for September: Labor Day Special (labor saving pasta recipes with fresh vegetables); Back to School Pasta; The Big Game (how professional athletes prepare); Fast Food Pasta (cheaper than eating at a "greasy

(Continued on page 8)

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In Canada

(Continued from page 6)

spoon"); School Lunches. The Canadian branch of Burson-Marsteller filled 138 requests for brochures in July and August.

National Pasta Week

Publicity efforts culminated in media placements across the board for National Pasta Week, October 1-10. Total circulation for magazines was 16 million. Tops among the features was a cover story in Good Housekeeping: "Casserole Cookbook — 50 Delicious One-Dish Meals." Circulation is 5 million. Lady's Circle for October also had a cover story "Penny Savers — Delicious 3-Course Dinners for only 50¢." The copy in part: With wise planning, careful shopping, and a return to the basics of cooking from scratch rather than using prepared foods, you will still be able to give your family meals that are low in cost, yet rate high in variety, nutrition, and taste. Circulation: 200,000. The headline in Mademoiselle that month was a double page spread: "High-Energy Eating Pasta Power." Featured was the fact that pasta is no more fattening than foods high in protein, and that pasta has fewer than half the calories of fatty foods such as butter, margarine, or fried foods. McCalls featured hungarian goulash with poppyseed noodles as part of its cover story on beef dishes while vegetables with pasta were in Parents Magazine in the form of lasagne roll-ups.

Color Pages

Newspaper color pages featured everything from National Pasta Week itself to noodles with eggplant, macaroni and turkey, chicken with noodles and vegetables. Newspaper Syndicate coverage in October had a total circulation of 68 million, and pasta and Pasta Week were featured in Amalgamated Publisher, Associated Press, Birmingham World, King Features, and Newspaper Enterprise Association.

TV Kit

Our "Eat Light with Pasta" television kit was requested by 90 stations. Contents of the kit-on-air prop were a trivet with wheat motif, script, recipe leaflet, four slides series, packages of elbow macaroni, spaghetti, and egg noodles. In addition, 26 radio stations, to date, have reported using pasta material. 90,300 "Eat Light with Pasta" leaflets were supplied to supermarket chains and independents, and trade publications carried announcements of National Pasta Week.

Perk Up Winter Menus

Count on macaroni products to help add variety to winter meals. There are egg noodles in various width from very fine to extra wide, plus fancy shapes.

Stuffed Beef Roll with Saffron Noodles
(Makes 6 servings, about 477 calories per serving)

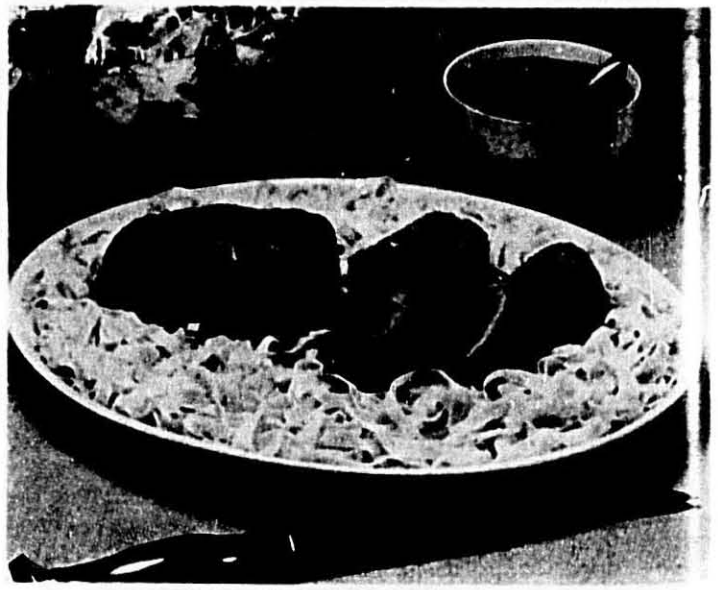
½ cup chopped celery
⅓ cup chopped green pepper
¼ cup chopped onion
1 tablespoon butter or margarine
1 can (3 ounces) chopped broiled mushrooms
1½ pounds ground beef round
2 tablespoons grated Parmesan cheese
2 tablespoons dry bread crumbs
¼ taspoon each: salt, pepper, garlic salt
1 egg slightly beaten
1 pimiento, cut in strips
1 tablespoon salt
¼ teaspoon saffron stamens
3 quarts boiling water
8 ounces medium egg noodles (about 4 cups)
Brown Mushroom Gravy* (optional)

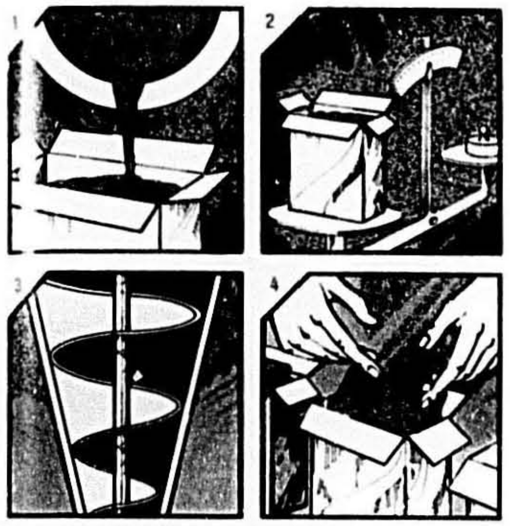
Cook celery, green pepper and on n in butter 3 minutes. Drain mushroo s reserve liquid for gravy. Add mu h rooms to vegetables; set aside. Mix gether meat, cheese, crumbs, ¼ t spoon salt, pepper, garlic salt and e g, blend well. On transparent plastic fi n, pat meat mixture into 10 x 8 x ½-i ch rectangle. Spoon vegetables across c n ter, lengthwise; add pimiento st s. With the aid of plastic film roll m t mixture over filling into 7 x 3½ x 2 inch roll. Chill, "seam" side d n about 1 hour. Bake in lightly butte ed shallow baking pan in 375° (moderate) oven 1 hour or until tests done.

Meanwhile, add 1 tablespoon salt and saffron to rapidly boiling water. Gradually add noodles so that water continues to boil. Cook uncovered, stirring occasionally, until tender. Drain in colander.

Serve sliced meat roll on saffron noodles with Brown Mushroom Gravy, if desired.

*To prepare **Brown Mushroom Gravy:** (Makes about 1⅔ cups) Remove excess fat from roasting pan; stir reserved mushroom liquid into pan drippings. Pour into measuring cup, add liquid from additional can (3 ounces) chopped broiled mushrooms. Add water to measure 1½ cups; gradually stir about ¼ cup of the liquid into 1 tablespoon flour to form a smooth past. Add remaining liquid and mushrooms. Brin gto boil, stirring constantly; boil 1 minute. Season to taste.





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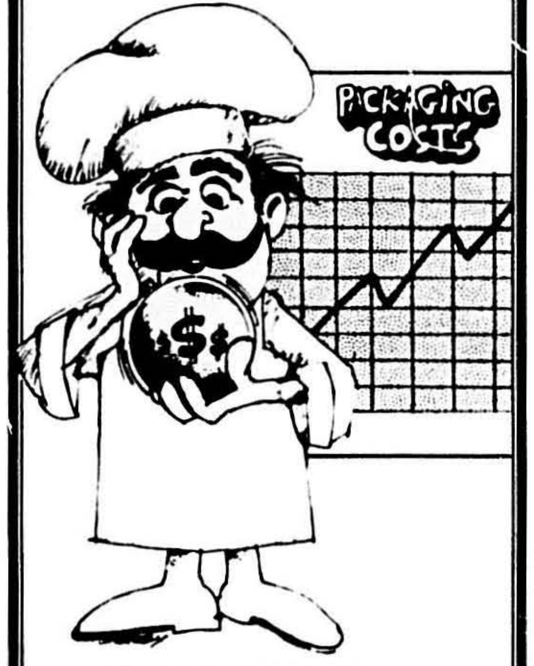

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Using Your Noodle

"Okay, now let's get it right. This is rotini and this anelli and this is mezzani . . . "

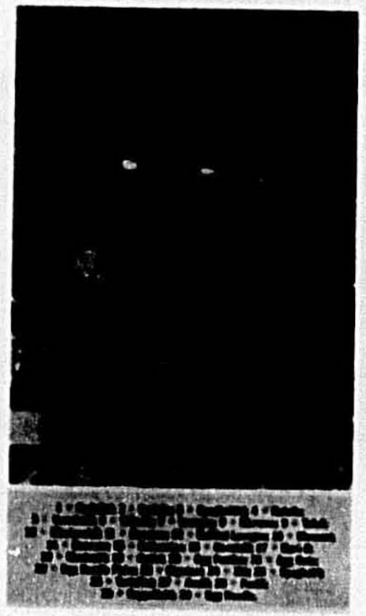
Deborah Vajda, associate editor of TWA Ambassador in-flight magazine, writes in the December issue:

Ever since Americans learned the word hors d'ocuvre we've been having fads in food. The Seventies brought quiche, croissants, baguettes and sparkling water. Now that we can pronounce Perrier we've been showered with a confetti of pastas: tortellini, rotini, anelli, mezzani, boccone and more. Whether you buy pasta ready-made or make your own in an oh so *alla moda* pasta machine, there are a few things you simply must know.

Authentic pasta is made from semolina or durum, which are both coarse, hardy wheat products. In Italy, pasta is served very fresh and is the first course of every meal. "Pasta is not a recipe. Is a craft," says Italian cuisiniere Marcella Hazan. "For hand-made pasta the amount of eggs determines everything. You make for six people? Use three eggs and see how much flour is absorbed." According to chef Wayne Skjelstad of Pronto Ristorante in Minneapolis, when cooking pasta, there are three things you absolutely should never do. First, if the noodles are handmade, don't let them get too dry and brittle before cooking them. Second, never put the noodles into anything but rapidly boiling water. If the water is not hot enough they will sink to the bottom and stick together in a lump. Third, **don't** put oil in the cooking water. The reason: the noodles become coated with oil and the sauce won't adhere to them.

Which Sauce

What sauces go with which pastas? Anything goes. If you're serving a sauce with meat, a shell-shaped noodle is good so that you can scoop up the meat. When it comes to choosing a pasta, except for noodles made with spinach or tomato, they all taste pretty much the same; the various names just give you a clue to their shapes: spaghetti is derived from the Italian **spago,** meaning string; **rotella,** circular noodles with spokes, comes from rotella, the word for a small wheel; and a **farfalla,** or butterfly inspired the elegant bowtie shaped noodles called farfallini.



Pasta Poster available from Push Pin Studios, Inc., 67 Irving Place, New York 10003.

In case you've been following another American culinary rage — dieting — don't rule out pasta altogether. A cup of noodles cooked ten minutes — **al dente,** literally "to the tooth" — contains approximately 216 calories. The same cup cooked twenty minutes has only 155. The sauce is where you add calories.

But why not indulge? It's about time we learn to stop repenting what's pasta.

Light and Hearty

Restaurant Business magazine for November has an article "Light and Hearty" by Kathleen M. Kenny.

She says: "Hearty foods have always been considered the menu standard, but now many popular restaurants throughout the country are introducing new items that appeal to those seeking lighter fare — in the Restaurant Business test kitchen we enjoyed experimenting with the concept of light and hearty foods. We tried using several of the same basic ingredients — pasta, beef, and seafood — and prepared them in many different ways. From these foods flow numerous preparation possibilities, both robust and delicate in nature."

Illustrated in the story for pasta is pasta primavera with a pesto sauce as a light dish. Other light dishes includ pasta with a light clam sauce, veg- table lasagne, pasta tossed in garl and olive oil, and a collection of pas salads which seem to be the curre trend.

On the hearty side there are exa ples of many robust and plentif sauces such as Bolognese, hot sausa and tomato, meatballs, creamy vo- gole (clam), and lasagne. Pasta is inexpensive and can be abundant on the plate without increasing the food costs.

Swiss Cookbook

Verband Schweizerischer Teigwarenfabriganten (Swiss Macaroni Manufacturers Association) has just printed a new cook book of 52 pages, "Die Hornli-Fibel."

Beautifully illustrated the booklet gives historical background, information on manufacturing, a glossary of sizes and shapes, cooking instructions, accompaniments such as herbs and vegetables, and some twenty-four mouth watering recipes.

The booklet sells for 2.50 Swiss francs.

Premium Offer

Creamette Co., a subsidiary of B- den, Columbus, Ohio, is offering n- talgia-theme macaroni and spaghe i tins to consumers. One tin may be h d for three proofs-of-purchase a d $2.99, or both tins for $3.99. Tea- off pads with order froms are availab e at store displays.

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Q arterly Durum Report

he Crop Reporting Board on Octo r 1 forecasted production of U.S. dı m wheat at 182 million bushels (4 6 million metric tons), up 68 percc from last year, but 3 percent belo the September 1 forecast. Yields ar expected to average 32.2 bushels pe acre compared with 22.4 bushels in 980 and 27.1 bushels in 1979. The du m wheat harvest was completed we ahead of normal in all producing [illegible] In North Dakota, 97 percent of the acreage was combined by mid-September compared with 69 percent last year. Conditions for the completion of harvest were good with a minimal amount of sprout damage. Durum wheat offered in the spot market was mostly of poor quality and the high quality durum was in good demand. Spot offerings containing under 75 percent hard kernels, grading amber, were discounted 20-25 cents per bushel. Spot offerings under 60 percent hard kernels, grading durum, were discounted 50 cents per bushel.

Stocks

According to the Crop Reporting Board, U.S. durum wheat stocks in all positions as of October 1, 1981 totaled 187 million bushels (5.10 million metric tons), which was 52 percent greater than last year's 123 million (3.34 million metric tons). Farm holdings accounted for 78 percent of the total or 146 million bushels (3.97 million metric tons) and off-farm stocks accounted for the remaining 22 percent or 41 million (1.13 million metric tons). La year farm holdings totaled 88.5 mi n bushels (2.41 million metric tor and off-farm stocks were 34.4 mi n (936 thousand metric tons). Di pearance of durum wheat during e June-September period totaled 54 million bushels (1.49 million metric ns) compared with 46.5 million (1. million metric tons) during the sa period one year ago.

Ex orts

U S. exports of durum wheat during he first quarter of the crop year tota d 684.2 thousand metric tons, whi h was an increase of 109.1 thousand in comparison with the previous year s 575.1 thousand. The increase in U.S. stocks, lower prices and reduced crops in the Mediterranean area stimulated foreign trade. The largest importers were Italy with a total of 281.8 thousand metric tons and the Netherlands with a total of 100.5 thousand, or a total of 382.3 thousand which accounted for over one-half of the total imports for the period. Durum exports out of Duluth/Superior since the opening of the shipping season through November 13, 1981 totaled 30.7 million bushels (836.8 thousand metric tons) compared wtih 34.6 million (941.9 thousand metric tons) during the same period last year.

Durum Trade Will Expand

North Dakota State Wheat Commission says world durum trade will expand in 1981-82. Minneapolis cash durum prices are currently following a range of $4.20-4.75 for =1 Hard Amber Durum, and are at their lowest point since the spring of 1979. A 70 percent increase in U.S. production (a record crop) this year and the additional pressure of a much larger Canadian crop are the major factors which brought prices rapidly downward from the November, 1980 range of $6.50-8.15 for =1 Hard Amber Durum at Minneapolis. U.S. carryover stocks next May 31 are expected to be as large as the entire 1980 U.S. durum crop.

The bright side of this otherwise gloomy situation is that durum imports from the U.S. and Canada by four Mediterranean area countries, Italy, Algeria, Tunisia, and Morocco, are expected to increase to 107 million bushels from last year's total of 78 million bushels. These four nations have accounted for half of world durum imports over the past 10 years. Additional imports by France, Spain, and other Mediterranean nations could push the area's total durum demand to 130 million bushels.

As a result U.S. durum exports are expected to rebound from last year's 59 million bushel export level to 80 million bushels in 1981-82. U.S. durum sales for the first five months (June-October) of the current marketing year were up 33 percent from quantities committed for the same period a year ago. Heavy U.S. and Canadian year end stocks are likely to keep durum prices from improving substantially for some time barring drastic reductions in 1982 production.

Arizona Durum Acreage Down

The U.S. Wheat Associates Newsletter states that due to depressed durum markets Arizona producers will seed only 150,000 acres in 1982 compared to 250,000 in 1981, a 40 percent decrease in acreage. The switch will be to barley, hard red winter wheat and alfalfa.

In Canada

Durum wheat, according to Canadian statistics based on September 15th findings increased to 3,850,000 acres producing 102.6 million bushels compared to 3,100,000 acres grown in 1980 which produced 71.4 million bushels. The yield per acre was 26.6 bushels compared to last year's 23.0 bushels per acre. The visible supply of durum in licensed storage and in transit on October 28, 1981 totaled 765.8 thousand metric tons compared to 841.3 thousand one year ago. Canadian exports of durum in the June-September period were increased to 824.3 thousand metric tons. Algeria, Italy and the U.S.S.R. were the major importers taking a total of 695.1 thousand metric tons.

Export Coalition Formed

Amid a growing concern that processed U.S. agricultural goods are not keeping pace with bulk farm commodity sales in the world market, a group of food processors announced in New York recently the formation of the Export Processing Industry Coalition.

Robert C. Liebenow, president of the Corn Refiners Association, in announcing the formation of the coalition, cited a 70 percent decline in the proportion of refined wheat flour compared to exported bulk wheat. In 1970, he said, 11.8 percent of U.S. wheat exports were in the form of wheat flour; in 1980, only 3.2 percent of wheat exports were in the form of flour.

But, Liebenow added, processed wheat creates more jobs and adds more to the tax base of the U.S. than exports of unrefined wheat. If even 10 percent of the wheat exported from the U.S. in 1980 were in the form of processed flour, it could create up to $5.6 billion more business activity in

Export Coalition

(Continued from page 13)

the country, provide as many as 122,400 new jobs, and increase personal income by as much as $1.3 billion, according to his calculations.

Liebenow expressed growing concern that processed foods are being shut out of traditional markets around the world at the same time that U.S. producers are facing subsidized export competition from several major agricultural exporters. He cited proposals within the European Community to limit the import of value-added feed ingredients, such as corn gluten feed, in order to stimulate higher domestic grain production. He also pointed to the EC common agricultural policy in subsidizing domestic production and exports of farm goods.

The Export Processing Industry Coalition (EPIC) is comprised of the industrial Union Department of the AFL-CIO, the Corn Refiners Association, the Millers' National Federation, and the National Soybean Processors Association. Eleven international unions are also associated with the new interest group.

Cargill View on Exports

U.S. grain exports should continue to grow, but the pace of grain export expansion in the 1980s may be slower than the demand explosion of the 1970s, the chairman of Cargill said.

"As the momentum of demand picks up, I think U.S. exports will rise from this year's 5.1 billion bushels to 6.3 or 6.4 billion bushels by 1985," Whitney MacMillan told the American Society of Farm Managers and Rural Appraisers.

MacMillan said this year's record grain crops indicate that the United States can expand its grain production capacity to meet larger import needs.

"But to realize our capacity," he said, "we must build additional markets overseas. That challenge will be more difficult than it was in the 1970s for a variety of reasons."

A major concern related to the contined growth of U.S. grain exports involves the Eastern bloc countries and China, MacMillan said.

"These countries were a major — perhaps the major — growth market for U.S. grain exports in the 1970s," MacMillan said. "That growth came about because their domestic grain production failed to match the rising expectations of their consumers.

"While that trend should continue in the 1980s, the pace of growth for this market should be slower. Many of these countries are pressing up against their physical capacity to handle imports," the Cargill chief executive said.

Handling capacity will increase in the Eastern European countries as they invest in additional storage and distribution capabilities, MacMillan said, "but the easy gains in this market are now largely behind us."

Because of hard-currrency problems caused by lagging exports to the West, MacMillan said, many Eastern European countries are encountering the additional problem of limited ability to pay for imports.

Many developing countries also contributed to the rapid growth of grain-import demand during the 70s, MacMillan said.

"But while many of these rapidly developing less developed countries will sustain their strong economic growth into the 1980s, others face rising energy import costs that drain off much of their foreign exchange," he pointed out.

Another concern, said MacMillan, is that the declining value of the dollar during much of the 1970s has been reversed, and the dollar promises to be significantly stronger in the 1980s.

"This will push up the local currency costs of U.S. grain imports and provide a partial brake on burgeoning demand in the developing countries," he said.

More Competition

An additional challenge, MacMillan said, is that competition to serve import demand also will strengthen in the 1980s.

"Our competitiors — largely left out of the export growth of the 1970s — are now finally gearing up to serve this demand," he said. "Canada has embarked on an investment program designed to expand its grain exports 50 percent by 1985. Argentina has already boosted its grain output 50 percent."

A new competitor is the European Community (EC), MacMillan said, adding that "as long as the EC continues its high grain price supports and protectionist variable levies on grain imports, this trend will continue."

Turning to political uncertainties, MacMillan said that the partial Soviet grain embargo cut the U.S. share of that market from 75 percent to around 35 percent today and helped create additional competition that will be long lasting.

MacMillan said that because U.S. food exports account for less than 5 percent of world food use, they simply are too small a share to exploit successfully for sustained diplomatic advantage.

"While these dawning realities make use of food as a weapon less likely, we cannot rule out a future embargo," he said. "Whether it occurs is largely beyond our control or ability to predict."

Causes for Optimism

MacMillan also cited causes for optimism about the 1980s.

"We continue to have surplus production, transportation and export elevator capacity," he said. "While our competitiors are scrambling to catch up with the demand growth they missed in the 1970s, the United States is poised and ready to serve foreign demand."

Another factor, he said, is that the world's population continues to grow by 80 million people each year.

"Even at current consumption levels, this adds 25 million tons of new demand each year," MacMillan said.

"Moreover, I think we can be cautiously optimistic that economic policies in the United States and elsewhere are getting back on the right track. Restoring healthy, non-inflationary growth will be a longer, more difficult task than was thought six months ago. But we seem to be headed that way," he said.

Italian Durum Down

In Italy, 1981 wheat production was estimated at 8.5 million tonnes, against nearly 9.2 million last year, with durum placed at 3.3 million tons, 10% less than 1980 record of 3.7 million. Durum imports for August 1980-July 1981 totaled 656,000 tons, including 154,000 tonnes from the U.S. and most of the remainder from Canada. For current marketing year, imports could reach 800,000 tonnes, depending mainly on that country's exports of wheat flour, semolina and pasta.

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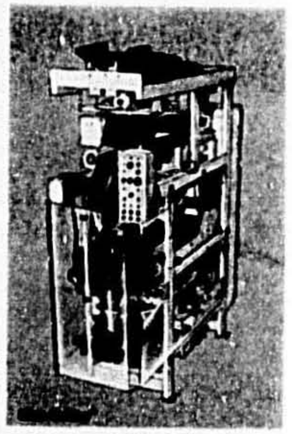

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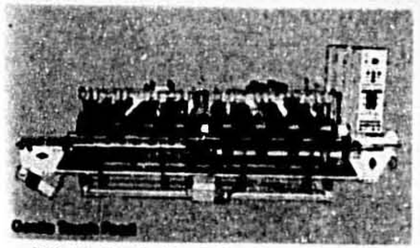

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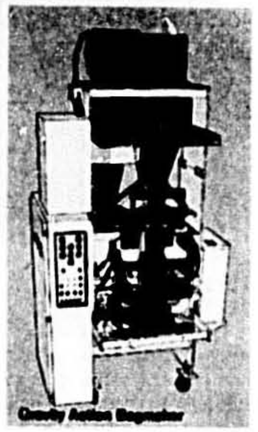

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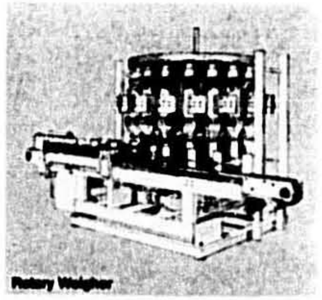

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Foremost-McKesson Opens Pasta Research and Development Laboratory

Foremost - McKesson announced the opening of a million-dollar pasta research and development laboratory at its Research Center in Dublin, California. The laboratory, one of the nation's few major facilities designed specifically to develop and test new pasta products, includes a pilot plant to test commercial production.

Activities at the new laboratory will include the development of new pasta products and line extensions, the evaluation of ingredients and blends of raw materials.

Scientific probes, gauges and computers will permit pasta researchers to control every step of product development, measure the result and change variables (drying time, temperature, mixing rates and volumes) to alter final product.

The principal purpose of the new laboratory is to support C. F. Mueller Co. pasta products, a division of the Foremost-McKesson Grocery Products Division. Mueller, which produces a full line of macaroni, rigatoni, spaghetti and other pastas, is sold in 22 eastern and midwestern states and accounts for about 25 percent of the pasta sales in the areas it serves.

Increasing investments in pasta and related starch-based products is a key element in Foremost-McKesson Foods Group's strategy for increased revenues and profits over the next four years.

The Foods Groups's goal is an increase from fiscal 1981 revenues of $994 million with an operating profit of $45 million to revenues of $1.5 billion and an operating profit of $75 million by 1985. This objective represents a four-year compound growth rate of 11 percent in revenues and 14 percent in operating profit.

"Our grocery products business, which represents our third most profitable division, is anchored in the 20 percent share Mueller's enjoys in the $703 million dry pasta market," says Bill Markus, president of the Foods Group. "Substantial product development efforts continue in grocery products, with the focus on improved dry pasta products, and new side-dish and main-dish pasta products."

Experimental Pasta — Pasta Researcher Juan Lopez snips strands of experimental spaghetti at Foremost-McKesson's new million-dollar pasta laboratory which was opened December 3 in Dublin, California.

Markus says the need and appeal of convenience foods to the working family, coupled with a trend toward food that provides energy and nutrition, has made pasta increasingly popular.

"Pasta products are being afforded a new vitality as a supply of good nutrition and energy," says Markus. In contrast to the popular belief that pasta is a fattening food, more and more people are getting the true image of pasta as a good tasting supply of complex carbohydrates for energy with practically no fat content.

The Research Center

The Foremost-McKesson Research Center is a 45,000-square-foot food development lab that offers capabilities ranging from the initial feasibility analysis of developing a product through final product tasting that tests consumer response.

The lab is comprised of six service areas: Product Development, Process Development, Analytical Lab Testing, Sensory Evaluation, Quality Assurance and Library Services.

Consumer demand is always changing. One key to meeting that demand is the development of new products. The Research Center has **Product Development** services in beverage production, frozen food and dessert development, bakery goods, confections, wines and spirits, dairy products and a wide variety of food ingredients. A new product can be a duplication of an already existing product, a completely new idea or a new form, shape or flavor of an existing product.

Once a new product idea is developed it must be turned into a marketable item. The **Process Development** group helps make the transition from the laboratory bench top to the production plant by developing efficient and effective production systems. The Research Center provides both consulting and specific unit processes that make the leap from pilot development to production plant a smooth one.

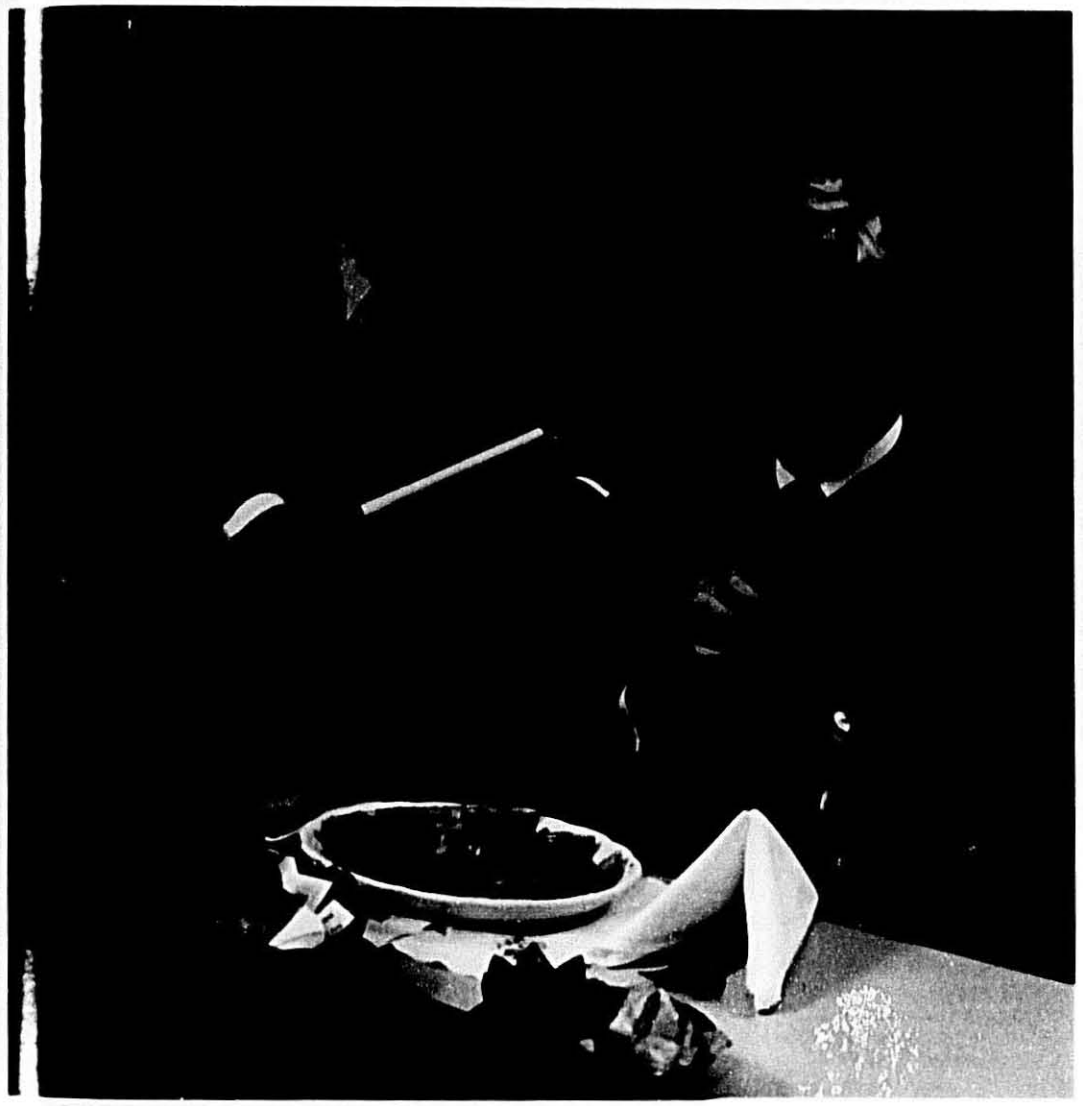
The discriminating consumer and the government are equally concerned about what goes into a product. The Research Center's **Analytical Labs** can provide the complete composition of a product including nutritional analysis to test for vitamins, minerals and other composites. This is especially useful for ongoing testing programs to assure compliance with FDA regulations. Other testing capabilities are water analysis, fats and oil analyses and toxic material analysis.

All the mechanical testing in the world doesn't help if your product can't pass the ultimate test — the palate of the consumer. The **Sensory Evaluation** area has a trained panel which provides detailed word descriptions of products or differences between products. These are specific, objective evaluations as they apply to not only taste but texture, appearance, even aftertaste. Each panel member is trained for more than a year and has developed special descriptive vocabulary skills to identify and characterize complex sensory mixtures. In addition the Research Center also runs preference/acceptability testing using consumer panels drawn from a group of about 3,000 people.

Once an item is developed, tested and produced in large quantities, it is crucial that the product is identical each and every time. The **Quality Assurance** program is designed to ensure product uniformity. This consistency of output includes not only the product but the nutrition label, the control of container fill and the quality of packaging, warehousing and shipping.

Lastly, the fast-changing nature of the food industry, matched with modification of federal regulations, require an up-to-date resource for informa-

(Continued on page 18)



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Research Laboratory

(Continued from page 16)

tion. The **Library Services** area is recognized as one of the finest sources of food nutrition information on the West Coast. It contains more than 5,500 books and bound journals. Each month more than 200 periodicals are received and a complete collection of government documents are indexed and filed. Membership in the Special Libraries Association provides access and loan privileges to a tremendous range of industry, association and academic libraries.

Some Pasta Facts

Americans love pasta in all shapes and sizes. In 1981, the National Pasta Association estimates, Americans spent over a billion dollars on pasta products. Most of these products are produced in the U.S. by American manufacturers who started feeding the American pasta appetite in earnest during World War I, when American companies picked up the slack after Italian imports were cut off.

Some other facts about pasta:

- The average American eats about 8½ lbs. of pasta per year. Total domestic consumption was 2.0 billion lbs. in 1980.
- Today, 86% of the homemakers in America use macaroni, spaghetti and noodle products, reports **Progressive Grocer** magazine.
- Total dry pasta sales in 1980 was $703 million.
- Spaghetti sales reached $291 million; egg noodles sales totaled $121 million.
- The U.S. ranks 4th in the world in per capita pasta consumption.
- There are more than 150 varieties of pasta available in the U.S. This includes 13 varieties of sea shells, two sizes of alphabets, and pasta shaped like rings, stars, crowns, hearts, clubs, spades, diamonds, triangles and curls, as well as macaroni, spaghetti and egg noodles.

Pasta products, in general, contain approximately 73% to 75% of carbohydrates. Carbohydrates not only is the primary fuel of the body, but also is involved in important portions of its functional machinery.

Barbara Moreland

Buitoni Foods Announces Changes in Marketing Personnel Assignments

The following management changes within the retail and food service marketing areas have been made at Buitoni Foods, according to an announcement by William P. Smolka, Buitoni Vice President — Marketing and Sales.

Tom Heffron, previously Buitoni marketing manager for pasta products, assumes responsibility for all Buitoni retail dry products, including pasta, prepared foods and sauces.

Ed Serban assumes marketing manager responsibilities for Buitoni's Food Service Division. Previously, Mr. Serban was Buitoni Marketing Manager — Prepared Foods.

According to Mr. Smolka, Buitoni Foods' corporate philosophy is to periodically rotate areas of responsibilities among its executives as a means of strengthening Buitoni's marketing performance and as a method of offering new growth for individuals by broadening their base of experience.

Barbara Moreland has joined Buitoni Foods Corporation as Sales Promotion Manager, Mr. Smolka announced.

Prior to joining Buitoni, Ms. Moreland was Sales Promotion Manager at The Pillsbury Company, where she began her professional career. Ms. Moreland has devoted her fifteen-year career to various aspects of the promotion field.

In making the announcement, Mr. Smolka stated, "We look forward to the talents Barbara Moreland brings to this important area and for sales promotion to become an increasingly important and visible part of Buitoni's marketing mix."

Ms. Moreland is a graduate of the University of Minnesota, where she earned her B.S. degree in home economics.

Buitoni Foods Corporation manufactures and markets a full line of quality Italian dry pasta products, sauces, pizzas and frozen entrees.

Record Earnings for RHM

Pre-tax profits of Ranks Hovis McDougall Limited in the 1981 fiscal year increased 40% over the previous year to a new record high, due in large part to improved results from the grocery, packaged cakes and overseas operations. The latter for the major U.K. flour miller and baking company include such diverse interests as a major position in pasta manufacturing in the U.S. and a bread baking operation in France.

RHM's profits for the fiscal year, the 53 weeks ended Sept. 5, 1981, were right in line with the forecast made several weeks ago when British Sugar Corporation, in a "dawn raid" on the London Stock Exchange, acquired a 14.7% interest in RHM shares. In a move that is often described in London financial circles as a quite daring counter-attack, RHM acquired 10.5% of British Sugar's shares. Since 40% of British Sugar is owned by S. and W. Berisford, a commodities broker, and Berisford is opposed to the RHM acquisition, the interpretation is that RHM has effectively blocked the possibility of a takeover move by British Sugar.

In a look to the future of the company, Peter Reynolds, chairman of RHM, said:

"Over the past year we have continued to improve the efficiency of our U.K. operations and to expand our very successful overseas interests. We have also taken energetic steps to improve our financial strength as the consolidated balance sheet will show.

"It is too early to make any profits forecast for the current financial year, but, despite very competitive conditions, our current trading is just ahead of last year.

"We expect to benefit from our continuing program of modernization, the recent successful launches of new products in the U.K. and the continued growth and expansion of our overseas businesses."

Lancaster Colony Report

Lancaster Colony Corporation, headquartered in Columbus, Ohio, operates manufacturing and marketing divisions within four major products groups: glass and pottery, rubber and plastic, metal cookware and specialty foods.

Consumer products encompass extension lines of gift, florist and tabletop glassware, car mats and other auto accessories, cookware, specialty foods, rubber and plastic housewares, pottery, candles, and recreational balls.

Commercial products include foods, glassware, cookware, candles, stoneware, plastics and matting that have been selected, adapted or developed for the commercial market.

Industrial products include automotive original equipment car mats, splash guards and other custom molded rubber and plastic components, glass bulbs for cathode ray tubes and lighting components.

Lancaster Colony Corporation, with annual sales of $308,000,000, assets of $182,000,000 and shareholders' equity of $81,000,000, has over 5,000,000 shares of stock outstanding.

Specialty Foods

Marzetti, the largest unit in the specialty foods group, has grown to more than seven times its sales volume in 1969, the date of its acquisition which marked Lancaster Colony's entry into specialty foods.

Further growth is underway. Marzetti advertising has been expanded and focused on Chicago and other markets in the Midwest. Product distribution is heavily concentrated in midwestern states but some items, particularly the original slaw dressing, are carried by nationwide chains. A manufacturing and warehousing facility was recently purchased in the Atlanta area to increase volume in southern states. By early 1982, this operation is expected to serve both retail and food service customers as a regional sales, production and distribution facility.

The first Marzetti Salads Unlimited salad bar opened this past year near Cincinnati and a second unit will start operations soon in Columbus. Initial results indicate that the company has a significant opportunity in self-service salad buffets featuring Marzetti dressings, and plans have been launched to open additional units. Future salad buffets will be located primarily in new Sun Belt shopping malls with patio-style restaurants and common seating areas.

During the past year, Allen Milk, manufacturer of refrigerated chip dips, dairy snacks and desserts, was acquired to complement the Marzetti products. Allen Milk has been a good acquisition and is contributing to the company's overall performance. A premium line of chip dips in eight flavors plus a pimiento spread is currently being introduced under the Marzetti label.

Following the close of the 1981 fiscal year, Inn Maid premium egg noodles were added to the family of specialty foods. These retail products are distributed primarily in Ohio and Indiana.

Frozen foods continue to contribute to the group's success. Mountain Top ready-to-bake pies and New York partially baked bread, acquired in recent years, have also been expanding retail distribution. Both operations are placing increased emphasis on the food service market for the coming year.

While the company continues to look for acquisitions which fit Lancaster Colony's proven specialty/convenience food marketing ability, the group's growth is primarily generated internally. Specialty foods accounted for 14 percent of fiscal 1981 sales and remains a strong growth opportunity for the company.

Pillsbury Executive Survey

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Pillsbury Reporter
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How do corporate executives feel about their jobs?

In August 1980, **The Wall Street Journal** and the Gallup organization posed that question to executive officers of the 1,300 largest U.S. corporations.

The survey asked about the executives' lives; how much time they devoted to their jobs, versus families, how they feel about the hours involved and what ways they have of getting away from it all.

The **Reporter** decided to see how Pillsbury executives compared with those in **The Wall Street Journal** survey. In July, the 135 officers at the vice president level and above were asked to complete a questionnaire about their personal and professional lives.

Among the 51 percent of surveys returned, the **Reporter** found that life at the top, or on the way to the top, requires a capacity for long hours, relocation, stress and recognition.

Long Hours

The 40 hour work week for Pillsbury executives is nonexistent according to the survey results. Fifty-nine percent of those responding said they worked between 50-59 hours a week, with 29 percent working between 60-69 hours, 10 percent work less than 50 hours per week and three percent said they worked 70 hours or more per week.

What's more, these hours often didn't include evenings and weekend meetings and time spent keeping up on correspondence and reading business publications.

On their way to the top the vast majority of Pillsbury executives have relocated, many several times. Thirty-six percent of those who responded to the survey indicated they had relocated two or three times, 23 percent had relocated six or more times during their careers, 16 percent had moved only once, 14 percent had moved four or five times and seven percent had never moved.

Family Relationship

As a result of the long hours and frequent moves, have family relationship suffered? A whopping 82 percent of those responding to the survey said yes. Eight percent said no and one percent said they didn't know.

Those who said yes pointed to time as the major contributor to the domestic situation. Typical responses included those who said an executive had to compromise and learn to make it work. "I have to learn to work as hard at my personal life as I do at my business life," said one executive. Another executive said: "Once one has been in an executive position for several years I forsee less sacrifice."

(Continued on page 22)

Peavey

Sales Offices

Pillsbury Survey

(Continued from page 19)

Another said: "You have to keep the family happy in order to really succeed."

Stress

Columns have been written on the relationship between stress and its affect on mental and physical health, yet Pillsbury executives seemed not to be bothered by stress as 72 percent answered no to that question. Those who have been affected by stress cite physical problems like high blood pressure, ulcers and general fatigue, which leaves them susceptible to colds and flu.

Exercise was the number one response to how executives personally cope with stress and job pressure, with 45 percent of those responding selecting it. Thirty-one percent said they took time off from their jobs to relieve stress and 17 percent developed hobbies. Others said, "I share the frustrations on the job with my spouse." I look for the light at the end of the tunnel and hope it's not an approaching train" and "I have strong family interests and have a tremendously active personal life outside the office that helps me to better cope with the job's demands." One executive even said that more work was the best relief for stress, saying: "Time off only increases stress."

Easing Pressures

The survey asked how the pressures of the job could be eased and the answers varied. Many pointed to better staffing and organization as the answer, but most said better communication could help alleviate the pressures of the job.

Some executives offered suggestions of their own on how pressures could be eased on the job. They included: "Fewer non-productive meetings and task forces. I believe better staffing, organization and communications are needed at Pillsbury," "Upper management makes too many short term decisions versus executing long term plans," "Less silly politics would be helpful" and "Pressure is fundamental to the responsibility, you must accept it and cope with it and not agonize over problems beyond human control."

Climbing the ladder of success is not an overnight accomplishment for most people. It takes time and planning. When asked if they were pleased with the overall direction of their careers, Pillsbury executives overwhelmingly said yes, with 91 percent responding affirmatively. Five percent said no and three percent said they didn't know. One executive commented: "As much as I complain about the system, it does seem to work. The cream does rise to the top in this company. Time and grade are not essential as sustained creative output."

When asked how they think their lives would change if they reached their career goals, Pillsbury executives said it would mean more time away from family, more stress, more involvement in community affairs, but most importantly more fulfillment. Other responses to the question included: "When I reach my career goal I will seriously start to develop a strong successor," "One needs to be realistic about career goals — too much ambition may be unhealthy — not everyone can reach the summit," "I don't expect to be fully satisfied with business success, there's always more to consider" and lastly "I expect greater wealth."

How About Retirement?

With the emphasis placed on their jobs, many would say Pillsbury executives are workaholics. If so, then how do they feel about retirement?

The percentages were close, with 12 percent saying they were eager for retirement, 16 percent saying they were apprehensive and 19 percent saying they were both. Five percent of those responding said they didn't know.

Comments about retirement included: "I would prefer a 'second career' to retirement," "I like my work, but am not afraid to change" and "I have to start thinking about the financial implications."

What did the **Reporter** learn from the survey? It learned that Pillsbury executives overall are very happy with their careers, that they accept the long hours and stresses as part of the job and that they expect these factors to increase as their responsibilities do.

At the present time, most macaroni and egg noodle products are enriched to comply with the Federal Standards of Identity that were promulgated in 1945. Data available show that, at the present time, 80% of our production is enriched.

Authentically International IPACK-IMA '82

The exhibition will house over a thousand exhibitors.

The lists of exhibitors who have completed their requests for space at IPACK-IMA '82 (international exhibition packing and packaging, mechanical handling, food-processing industrial machinery) reveals that even before the opening date of the coming Exhibition — scheduled to take place **from March 19th - 24th in the pavilions of the Milan Trade Fair** on an area of 150,000 square metres — over one thousand firms have already decided to take part. The number of applications is, at this juncture, 20% more than for the previous edition.

It is already possible to state that there will be exhibitors from 21 nations, representing 4 continents: Europe, America, Asia and Australia.

The most numerous contingents of foreign exhibitors, in order of importance, will be from West Germany. the United States, France, Switzerland, Holland, Japan and Belgium. This will certainly provide opportunities for very useful technical comparisons.

It is a generally recognized fact that IPACK-IMA has the merit of creating a background for discussion between the leading names in the trade as well as offering technical stimulus of indisputed value and of condensing geographical areas (the Mediterranean basin and the developing or emerging countries) where agro-food production progress in particular, industrial in general and commercial is conditioned by the availability and use on a wide scale of a whole range of plant engineering concentrated on the processing and marketing of consumer products, protected and preserved in suitable packs.

It is well known that the production on display at IPACK-IMA represents an ideal single line of industrial processing which, starting with the processing of the original foodstuff, by means of highly specialized machines and using very advanced technologies, eventually reaches the different stages of packing and packaging and winds up with a series of mechanical means for all the storage operations.

For information it is advisable to apply to the exhibition secretariat at Via Ravizza, 62, Milan, telex 332134.

Peavey Company Growth

Flour Milling

During the decade of the 1970's, total U.S. flour production increased 10 percent, keeping pace with a 10 percent increase in population. A per capita consumption increase in the U.S. of more than 6 percent, from 113 to 120 pounds per year, offset a 6 percent decline in U.S. flour exports.

In that same period, Peavey substantially strengthened its position in flour milling as Peavey's annual flour volume increased 24 percent and Peavey's share of total U.S. flour production increased 12.5 percent.

Peavey's nine flour mills produce a wide range of specialty products which are marketed both bulk and bagged to high-volume bakery customers, as well as variety of bakeries with specialized needs. Peavey has the leading share of the semolina and durum flour market, which consists primarily of pasta manufacturers.

In its most recent fiscal year ended July 31, 1981, Peavey again increased its flour milling market share with a 4 percent volume increase versus a total industry gain of 3 percent.

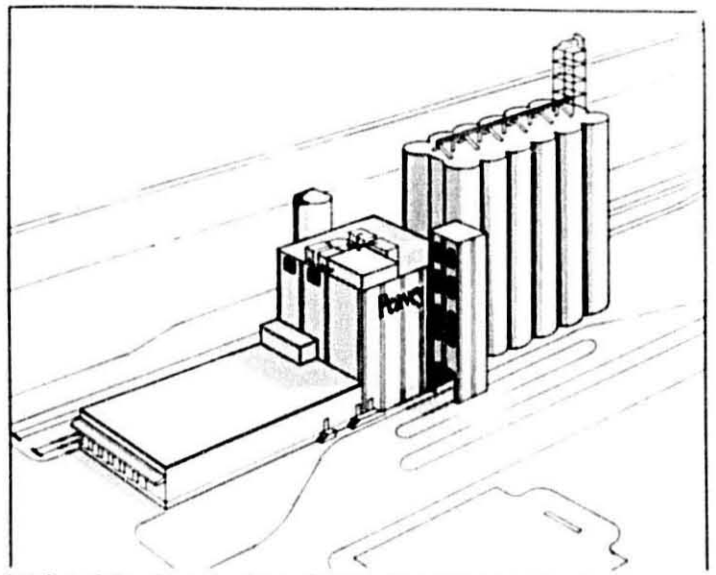
Agriculture

During the decade of the 1970's, the United States increased grain production more than 50 percent and increased grain exports more than two and one-half times. In that same period, Peavy grain merchandising volume, to both domestic and export markets, increased more than four times, grain transport capabilities quadrupled and commodity brokerage revenues were up approximately ten times.

Peavey operates grain export facilities near New Orleans and at Superior, Wisconsin. The Company has plans to construct a third grain export facility at Kalama, Washington, on the Columbia River. Total Peavey grain merchandising volume, worldwide, exceeds 600 million bushels annually.

Specialty Retailing

In 1974, the year Peavey's Retail Group was formed, sales were $50 million through 95 farm stores, fabric stores and building supply centers. In the past seven years, internal growth and acquisitions have about equally accounted for sales growth to $227 million through 225 farm stores, fabric stores and building supply centers.



Artist's rendering shows new Peavey Company flour milling complex under construction at Tolleson, Arizona, outside Phoenix. Shown are warehouse at left; five-story mill containing bakery flour and durum milling units, center; and 500,000 bushel wheat storage elevator at right.

Tolleson Will Be Peavey's 10th Major Flour Mill

The new Peavey flour milling complex at Tolleson, Arizona, will be the Company's tenth major flour mill. Other Peavey mills are located in Denver and Commerce City, Colorado; Alton; Illinois; Hastings, Minnesota; Billings, Montana; Buffalo, New New York; Ogden and Salt Lake City, Utah; and Superior, Wisconsin.

The five-story Tolleson operation will house a 5,000 hundredweight daily capacity mill to grind hard winter wheat to bakery flour and a 3,000 hundredweight daily capacity durum mill to produce semolina and durum flour for pasta manufacturers.

The two mills will have an energy efficient environmental control system to maintain humidity at as much as 45 percent, much higher than the local climate.

Wheat for the bakery flour mill will come from Arizona and other wheat-producing states. The durum mill will primarily utilize durum from Arizona producers.

Paul N. Hickert is Peavey's project coordinator for the Tolleson mill.

The construction of a new mill at Tolleson caps a several year period in which Peavey Company invested substantially in flour mill modernization and expansion. When completed, Peavey's Tolleson mill will join a group of flour milling operations as modern and efficient as any in the industry.

In addition to having a 10 percent share of U.S. flour production, Peavey produces the widest range of specialty flours; is the largest producer of semolina and durum flour of the pasta industry and is one of the largest suppliers of private label consumer flour sold through supermarkets. The new Tolleson mill will enable Peavey to increase its market share in the faster growing population area of the Southwest.

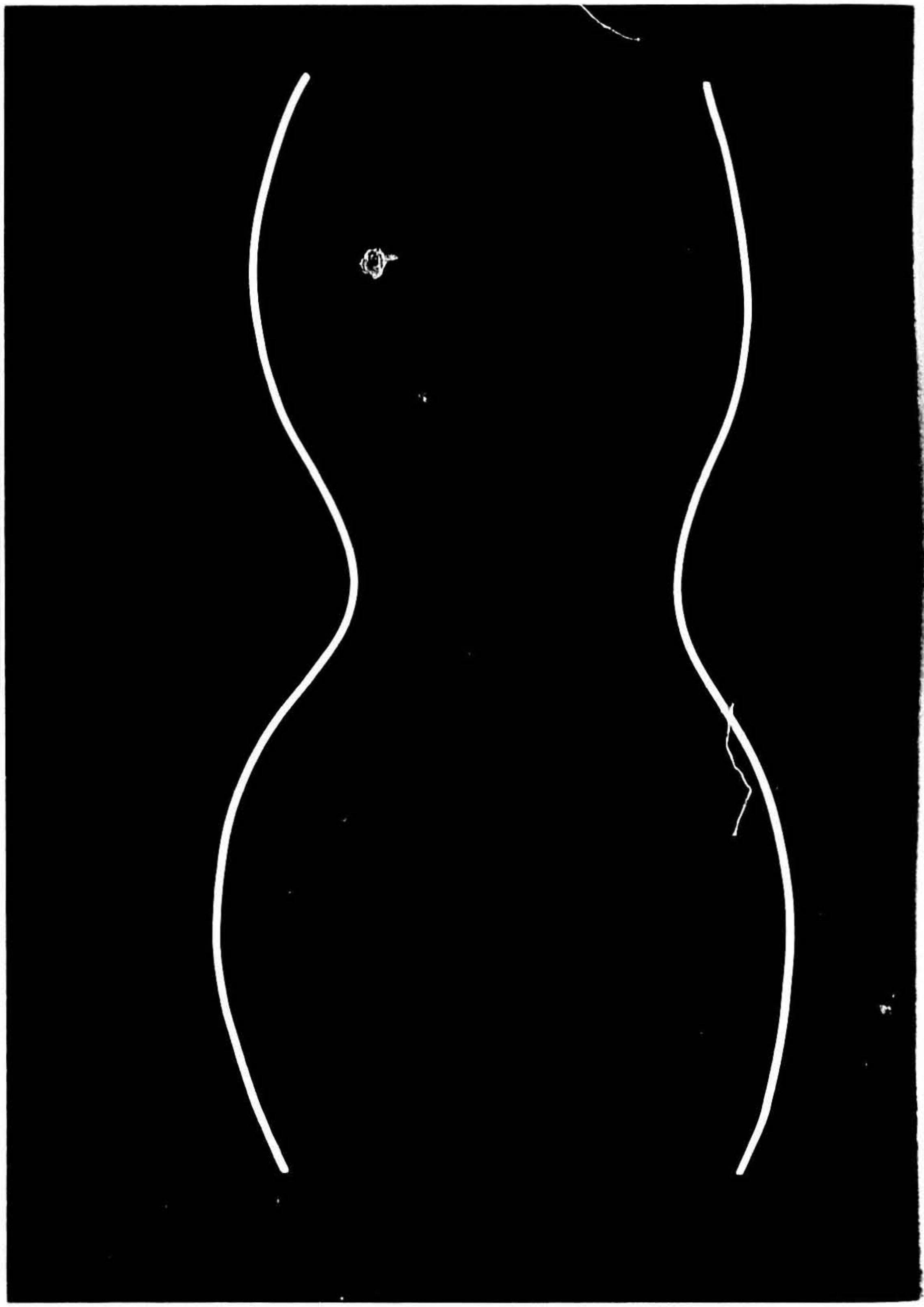
Younglove Construction Company of Sioux City, Iowa is the major contractor for the Tolleson project.

Dividend Increased

The board of directors of Peavey Company approved a 1½¢ hike in the quarterly dividend on the common stock, effective with the dividend payable Jan. 15 to shareholders of record on Jan. 4.

The new dividend of 28½¢ per share indicates an annual rate of $1.20, up from the current annual dividend of $1.14.

The board also declared the regular dividend of $1.50 per share on the two classes of preferred stock, also payable Jan. 15.



Pasta draws a fine line

Most everything about
pasta is positive.

Pastas – let's tell it like it is.

ADM

ADM also supplies quality shortening, [illegible] sweeteners,
[illegible] soy proteins, dough conditioners and vital wheat gluten
for the pasta and baking industry.

Robert M. Howard

New Day Dawning For Farmers

The traditional ups and downs of agribusiness are due to give way to a more consistent prosperity, predicts a businessman with wide contacts in farming.

James D. Fetrow, manager of U.S. agronomic operations for Asgrow Seed Company in Kalamazoo, Mich., attributes current difficulties in agriculture to a transition from 40 years of surplus—an era that ended in 1972. Farmers, he says, are suffering from high interest rates, inadequate financing, bad weather and poor management.

Despite his optimism for the future, he acknowledges that farmers have a long row to hoe. Although the burden of regulation will be lighter, he says, "there will be a wholesale reduction in the federal budget as it affects those who can afford to pay their own way."

Energy costs will have a heavy impact, and there could be dramatic rises in fertilizer prices. "Anhydrous ammonia could quadruple in price if natural gas is fully decontrolled," Fetrow says.

But he expects American agriculture to rise to the challenge. "For the first time in many years," he says, "we see the average age of farmers dropping, which indicates more young people are going back to the farm."

International Multifoods Appointments

Robert M. Howard, vice-president and general manager of the Industrial Foods Division of International Multifoods Corp., has been elected an executive vice-president of the company. In a related action, Paul A. Taylor has been elected to succeed Mr. Howard as vice-president and general manager of the division.

Operations of the Industrial Foods Division, Multifoods' largest, include production of bakery flour, durum flour and bakery mixes and grain merchandizing.

Mr. Howard, 58, in the newly-created position will be responsible for Robin Hood Multifoods, a Canadian subsidiary, as well as for the Industrial Foods Division. He will report to Darrell M. Runke, president and chief executive officer of Multifoods.

A native of Minneapolis, Mr. Howard joined Multifoods as an engineer upon graduation from the University of Minneosta in 1947. He transferred to Buffalo, N.Y., as a division manager in 1950, and returned to Minneapolis as a mechanical engineer two years later.

Mr. Howard was named manager of bulk flour engineering in 1955, director of engineering in 1957, eastern region production manager in 1961 and manager of marketing planning in 1968. He became vice-president and gneral manager of the Industrial Foods Division in 1969. A director and member of the executive committee of the Millers' National Federation, Mr. Howard also is chairman of the Durum Wheat Institute. He is a member of the board of trustees for the Children's Health Center in Minneapolis.

Mr. Taylor, 42, has been a vice president in the Industrial Foods Division since 1979. A native of Berwyn, Ill., he joined the Industrial Foods Division in 1962 following graduation in 1961 from the University of Minnesota.

He was named marketing planning manager of the Consumer Products Division in 1969 and became general managr for Kaukauna cheese in 1971. He was named a Consumer Products Division vice-president in 1974.

Paul A. Taylor

Sharing the Economic Burden

Although Americans, on average, are spending about 17% of their family budgets on food — down from about 20% some 15 years ago—low-income families (those with incomes under $5000) may spend as much as 40% of their family budgets on food, while people with incomes over $20,000 may spend less than 10% on food, according to Michigan State University nutritionist Carolyn Lackey.

She said that families should expect to pay between 10-15% more for food this year than last — and that includes just the prices for food put in the grocery cart — not the cost of paper products or other items.

How many people are in the family and how old they are have a big influence on how much a family will spend for food a week, Lackey pointed out. A young couple will consume more calories and spend more money on food than an older couple, and a young family with preschoolers will spend much less than a family with teenagers.

Energy Cents

Many furnace technicians put adjustment of the bonnet or plenum thermostat on oil and gas-fired heaters at the top of their list of cost-effective energy-saving measures. This thermostat turns off the fan which forces warm air through the duct system. On most heaters the thermostat is set at 120 degrees or higher, resulting in a loss of efficiency and money. If you reset it to just five degrees above the desired room temperature you can save almost $10 per year.

Other important maintenance items: clean filters, thermostat accuracy, freon level on air conditioners. Of course, turning down the house thermostat is still the best energy-saving adjustment.

Physical Distribution Managers

How can today's physical distribution manager — or the manager's top management — tell whether he or she is performing at an acceptable professional level? Historically, such managers were measured by how much money they could save, but today the criteria are different.

"Profiles in PDM," a bimonthly newsletter published by Hunt Personnel, Ltd., New York, lists and discusses 10 performance standards which it feels are more suitable to the times and the importance of physical distribution management as a major corporate function. They are as follows:

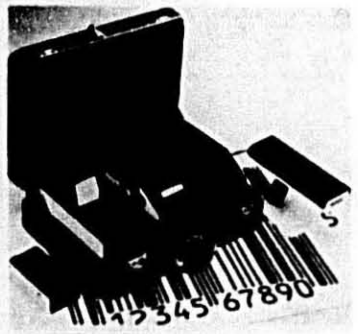
1. Awareness of inventory status
2. 80% freight consolidations achieved
3. Costs measured annually (or more often)
4. At least one productivity study under way at all times
5. Capacity utilization measured constantly
6. Level of knowledge of regulatory developments
7. Degree of input to corporate marketing plans
8. Continuing schedule of field (outside) contacts
9. Measurable participation in leadership roles in professional activities
10. To see the broad global applications of pdm, beyond the immediate corporate organization.

Hunt, which specializes in personnel for the distribution field and has offices in New York and Chicago, makes the newsletter available without charge to interested persons. Copies may be obtained from Hunt Personnel, Ltd. at 342 Madison Avenue, New York, NY 10017. 212-687-9140.

UPC Verification

A laser Universal Product Code verification system has been developed by Metrologic Instruments, Inc., for use by package printers, designers and manufacturers. Completely portable, the MS140 assures the user of UPC symbol accuracy.

The MS140 Verifier system is marketed as a complete package with capability for either simple read/display functions or comprehensive statistical printouts of bar code tolerances. The system, with everything needed for multi-level usage, sells for $4,330.



UPC Verifier Systems

All components of the system are lightweight and portable and are fitted into a standard briefcase for ease of transport around a printing or manufacturing facility, or to a customer location.

The scanner uses a laser and optics chain virtually identical to those used in supermarkets and has a wide scan capability which is reliable on all types of surfaces and substrata.

It is possible to use the MS140 in a variety of ways:

1. The head can either be used on table top or hand held while the printer and controller remain in the case.
2. The controller can be worn with a shoulder strap and the head carried by the pistol grip so that an operator can move freely about a printing or manufacturing plant.
3. All components can be removed from the case and placed on a table and bar codes passed under the scanner downport as it stands on the table top.

The MS140 controller is a sophisticated micro-computer with an alphanumeric keyboard and a 32 character display.

The MS140 Verifier includes the following components: Micro-computer/controller with shoulder strap, laser scanner head with removable pistol grip handle, head stand, 115 V AC power pack, 24 V NiCd battery pack, printer, verifier software and fitted standard size brief case.

Guidelines for Direct-Store-Delivery

The Food Marketing Institute and the Grocery Manufacturers of America have published joint voluntary guidelines aimed at standardizing direct-store-delivery (DSD) procedures and bringing order to the proliferation of delivery invoices used by vendors and retailers. The patchwork of systems reportedly has hampered store operations and productivity.

Although none of the DSD protocols are binding on the food industry, their acceptance seems likely since associations representing virtually every industry component have endorsed the guidelines. These groups include FMI, GMA, the National Association of Retail Grocers, the National Association of Convenience Stores, the National Food Distribution Association, the National Food Association, the Biscuit and Cracker Manufacturers' Association, the Food Store Distributors Council and the Potato Chip/Snack Food Association.

The guidelines permit all sides to put delivery-invoice data into electronic form, facilitating the use of computers and high-speed communication equipment, thereby cutting costs and improving productivity.

Benefits

FMI and GMA said the guidelines should promote benefits in the check-in of items; billing for goods; reduction of paperwork, and stocking and price marking products.

The key to bringing about these benefits is a 19-point plan agreed to by the task force, which has been at work on this since 1979. As detailed in a recently published pamphlet on the system, these points state:

"Each delivery invoice should represent a single customer delivery. Product sequence on the delivery invoice should be consistent and facilitate prompt and accurate check-in. Product identification should be clearly visible for all units being delivered. Retailer(s) should be given prior notice when an item identification, size, price or other essential information changes."

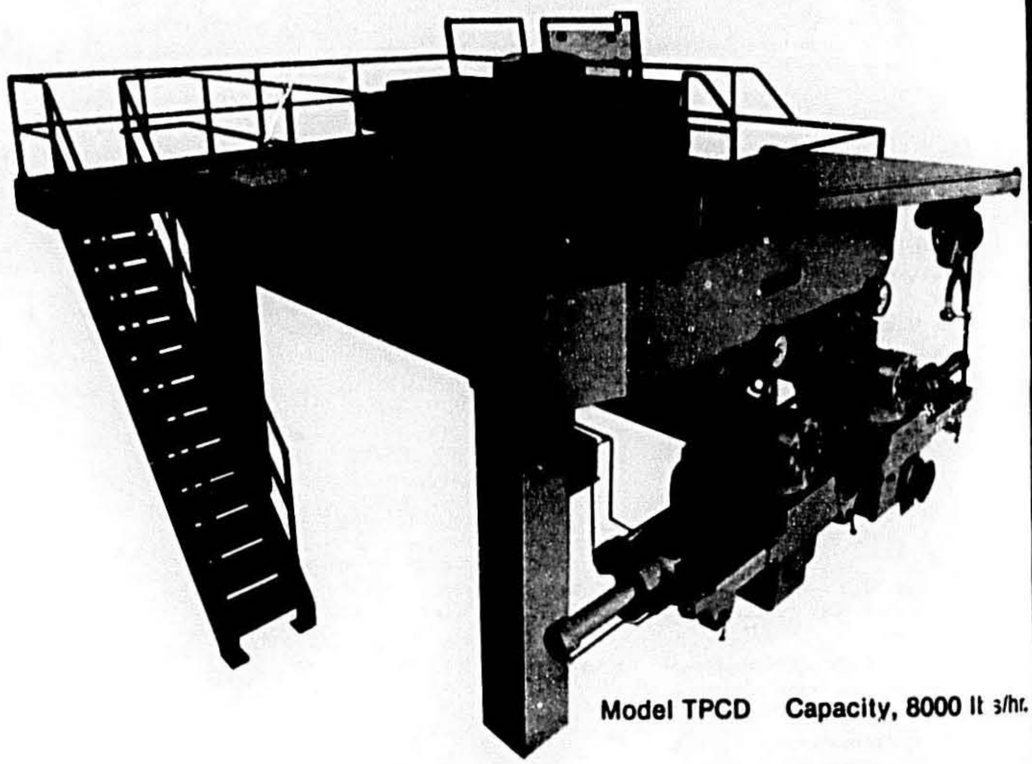
Use of UPC

The plan recommends use of the Universal Product Code for product

(Continued on page 30)

BUHLER-MIAG® EXTRUDERS . . .

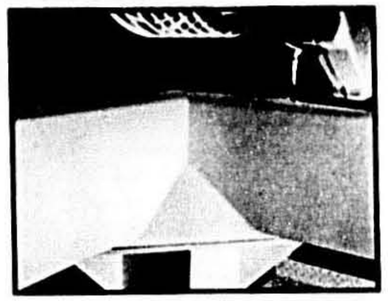
Performance You Can Depend On!



Model TPCD Capacity, 8000 lbs/hr.

anitary Design

- Structural Members completely enclosed; can't collect dust or dirt.
- Motors and Drives are open, away from product area and easy to service.
- Drive Guards are completely enclosed in oil baths for chain drives. Belt Drive Guards are open at bottom, to prevent dust and dirt accumulation.
- One-piece Unique Trough Design has smooth rounded corners for easy cleaning. Product hangup on mixer walls is virtually eliminated.
- Outboard Bearings on mixer shafts absolutely prevent product contamination by lubricant. Seals may be replaced without removing bearings or shafts.



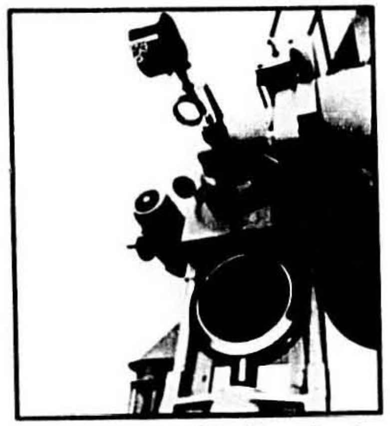
Press base and belt guard reflect the clean, efficient design and attention to detail in every Buhler-Miag press. Base is sturdy and easily accessible. All joints have smooth welds for easy cleaning.

asy Supervision and Operation

- Mixer Cover has plexiglass window for easy inspection.
- Variable Speed Drive with remote control for accurate capacity adjustment.
- Time-Saving Hydraulic Die Change Device.

ugged Construction

- Time-Proven Design assures long, trouble-free extruder life.
- Reliable U.S.-built Drive Components selected for low noise operation.



Head for round dies: 15¾" (400 mm) diameter, with hydraulic die change device (Single screw extruder).

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Top-grade quality is yours from BUHLER-MIAG equipment. Your customer recognizes and deserves it. Can ou afford to give him less?

Eight Models — Capacities from 50 to 16,000 lbs./hr.

Model	Lbs./hr. Capacity
TPLE (Single Screw) Lab Extruder	50- 300
TPAE (Single Screw)	660- 1,320
TPAD (Double Screw)	1,320- 2,640
TPBE (Single Screw)	1,000- 2,000
TPBD (Double Screw)	2,000- 4,000
TPCE (Single Screw)	2,000- 4,000
TPCD (Double Screw)	4,000- 8,000
TPCV (Four Screw)	8,000-16,000

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Direct-Store Delivery

(Continued from page 27)

identification. "When different delivery union and retail selling unit UPC codes exist for a product, the UPC number on the delivery invoice should be the delivery unit UPC code. Unless otherwise indicated, all UPC codes will be presumed to be from number system zero."

Other points: "Product description should uniquely identify the product and be the same on delivery-unit and delivery invoice. Easily understood abbreviations may be used. Brand or company identification should be on every line. Size should appear on the delivery unit as well as the delivery invoice. It should indicate the quantity contents of the retail selling unit. The pack should be identified on the delivery unit as well as the delivery invoice. It should indicate the number of retail selling units contained in the delivery unit."

The plan also notes: "A column should be provided on the delivery invoice so that the retail selling price can be inserted; "Off-invoice" price adjustments and/or allowances should be identified by item. They may be shown either in a clearly identified column or as a separate line on the delivery invoice. Prices and 'off-invoice' allowances should be extended and totaled on the delivery invoice."

DSD Guidelines

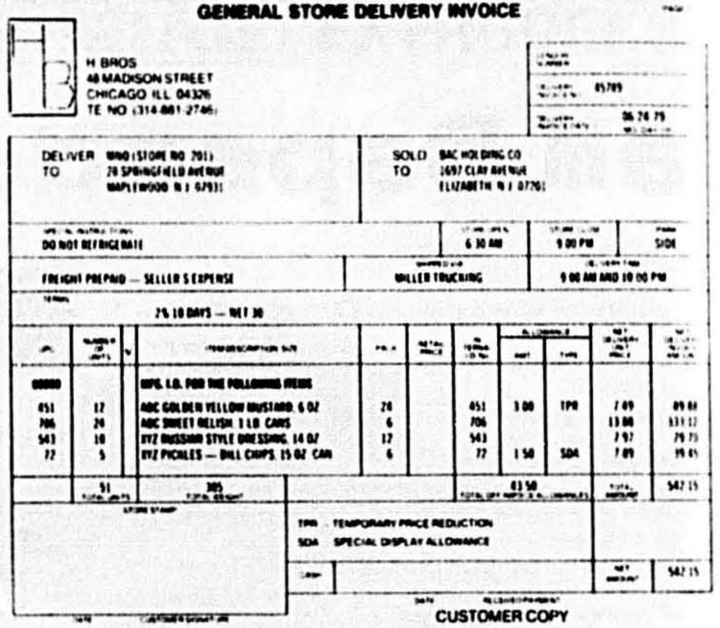
The protocols, which are not binding on any firm, state deposits on both delivered and returned containers should be identified by item and treated as separate transactions. All "rules" for UPC identification should be followed.

"Each document involved in the delivery process should be uniquely identified by number." Also: "The delivery date marked on the delivery invoice should coincide with the date on which the retailer takes possession of the product." The final six DSD guidelines are as follows:

— "The same guidelines for product identification, pricing, allowances, etc., which apply to printed items also apply to handwritten items.

— "Optional information may be included on the delivery invoice. This information, however, should be kept to a minimum and be included only when absolutely essential.

SAMPLE
GENERAL STORE DELIVERY INVOICE



H BROS
48 MADISON STREET
CHICAGO ILL 04326
TE NO (314-881-2746)

05789

06 24 79

DELIVER TO
WAO (STORE NO 701)
28 SPRINGFIELD AVENUE
MAPLEWOOD N J 07931

SOLD TO
BAC HOLDING CO
1697 CLAY AVENUE
ELIZABETH N J 07701

DO NOT REFRIGERATE

6 30 AM

9 00 PM

SIDE

FREIGHT PREPAID — SELLER'S EXPENSE

MILLER TRUCKING

9 00 AM AND 10 00 PM

2% 10 DAYS — NET 30

00000			MFG. I.D. FOR THE FOLLOWING ITEMS							
451	12		ABC GOLDEN YELLOW MUSTARD, 6 OZ	28		451	1 00	TPR	7 49	89 88
706	24		ABC SWEET RELISH 1 LB CANS	6		706			13 88	333 12
543	10		XYZ RUSSIAN STYLE DRESSING 14 OZ	12		543			7 97	79 70
77	5		XYZ PICKLES — DILL CHIPS 15 OZ CAN	6		77	1 50	SDA	7 89	39 45

51

305

41 50

547 15

TPR TEMPORARY PRICE REDUCTION
SDA SPECIAL DISPLAY ALLOWANCE

547 15

CUSTOMER COPY

— "The physical size of the delivery invoice should be compatible with normal paper-handling systems (maximum size 8.5 x 14 ins.). Also, it should be large enough to allow the presentation of the necessary information in a clear, easily understandable format.

— "There should be separate documents for credit delivery invoices, all clearly identified. "The same guidlines for information content and format which apply to debit delivery invoices should apply also to credit invoices.

— "An original of the delivery invoice should be left at the store with the delivery.

— "The reverse side of the delivery invoice may be used for vendor statements concerning terms, conditions, handling, compliance, etc."

Sample Formats

Putting the guidelines into usable form, the task force developed, eight sample formats covering general practices, such as a direct-store-delivery invoice and a beverage-delivery invoice.

The prototype direct-store-delivery invoice, for example, provides for 22 types of entries, ranging from the firm's name and address to vendor number and including entries for total units, UPC unit code, retail price and customer signature.

The prototypes also cover such areas as general store delivery, preprint container credit, viable weight delivery, service merchandiser delivery and manually prepared delivery invoices.

Supermarket Sales in 1980 Off

The supermarket industry posted "negative growth" in 1980 after adjusting for inflation, according to a Food Marketing Institute study.

FMI, in its Annual Financial Review, reported total supermarket sales in 1980 had risen $16 billion, reaching an all-time high of $116.9 billion. However, after these sales were adjusted to account for inflation, the $67.1 billion posted for "real" sales in 1979 slumped to $65.6 billion last year. This was the first decline in "real" sales since the first report was compiled in 1971.

During 1980 inflation, as measured by the Consumer Price Index, rose to a $13.5% rate. Retail food prices, meanwhile, increased 8%.

Inflation reduced growth of supermarkets' net income, FMI said. While net income rose $161 million, to $1.59 billion in 1980, real income after inflation fell from $656 million in 1979, to $643 million.

(Continued on page 32)

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ASEECO offers much more than high quality, automated equipment. ASEECO is also a service company whose years of international processing experience can provide you with:

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- Electrical Engineering and Control Panel Design
- Machinery Selection and Procurement
- Evaluation of Sub-Contracts and Bids
- Erection and Installation of Machinery
- Plant "Start-Up" and Final Adjustment
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- Service After Sale

PRODUCT TESTING:

To ensure the proper application and design of ASEECO products, a research and development facility is maintained to conduct actual on-product tests to determine handling characteristics and to obtain data for the design of spacialized process machinery.

TURN-KEY PROJECTS:

In addition to the design, engineering and supply of equipment, ASEECO will, if desired, assist in commissioning a process facility on stream. This service includes the preparation of operating and maintenance manuals, the training of operating personnel, conducting trial and test runs and the supervision of initial operations.

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ASEECO is prepared to assist clients in obtaining comprehensive project financing. This assistance is inclusive of counseling on the type of financing best suited to your requirements and locating the source that can provide it.

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Company ______________ Phone ______________
Address ______________ Zip ______________

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16-page catalog provides features, applications, specifications and model selection guide for entire ASEECO line. Includes diagrams and photographs. U.S. and foreign sales offices listed. A must on any equipment specifier's desk.

ASEECO-Lift Overlapping Bucket Elevators. ☐
Simple design. Modular construction. Sanitary. Open tubular and solid wall as well as totally enclosed models. One piece plastic buckets. Seven configurations—13 bucket sizes.

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Available in troughed and flat slider bed designs. Flat and troughed roller bed, woven steel belt or introlox. Sanitary construction.

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MODU/TRAN II® Vibratory Distribution System. ☐
Simultaneous conveying and distribution of product on demand to multiple packaging machines, hoppers, sorters and mixers without starvation or product recirculation. Compact. Sanitary design.

ASEECO Vibrating Conveyors. ☐
For conveying any free flowing or semi-free flowing material. Also for processing, heating, cooling, separating and screening applications. Exclusive flex spring linkage provides positive vibration of tray without damping underload. Available in natural frequency design.

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Fully automatic bin storage systems for free flowing materials. Sanitary construction and multitude of options.

ASEECO ACCUMAVEYOR.® ☐
Automatic storage system which accepts non-free flowing products at varying rates and discharges product on demand. Stores product in bulk. Fills the gap between continuous processing and packaging machines. Two basic models with infeed and discharge options to meet varying product characteristics.

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Supermarket Sales Off

(Continued from page 30)

This was the second consecutive time real income slumped after reaching a high of $681 million in 1978. Assessing these developments, as well as other findings pointing to inflation-produced "negative growth," Timothy M. Hammonds, FMI senior vice president said food retailers should consider inflation in their daily decision making.

"One message in this (report) is that individual companies ought to begin, if they are not already, using inflation-adjusted numbers in their day-to-day operations." For example, food retailers could use "inflation-adjusted return-on-investment hurdle rates for their daily investment decisions." Hurdle rates are the minimum acceptable rate of return for undertaking new investments. The need for such a close watch on daily store operations was accentuated further by data for return on total assets that shows supermarkets in 1980 failed to keep pace with inflation — incurring a "paper loss." (Return on total assets is net income after taxes, and before interest, as a percentage of total assets.)

Retailers' 1980 return on total assets was 6.6%, but they posted a 0.1% loss after inflation adjustments,-including gain on debt. By comparison, return on total assets in 1979 and 1978 was 7.1% and 6.8%, respectively. After adjustment for inflation, though, the "real" return was 0.6% in 1979 and 1% in 1978, the FMI report stated.

"While this may look like a grim picture," Hammonds said, "it's really a phenomenon all industries are experiencing now, it's not something unique to the supermarket industry."

Inflation's Toll

Inflation took a heavy toll on profit margins and return on net worth, Hammonds noted.

For example, profit margins were measured at 0.98% in 1980, identical to their 1979 performance. However, after adjustments for inflation. supermarkets' profit margins declined to the — 0.44% level last year, compared with — 0.2% in 1979. In fact, the last time food retailers' posted a real gain in profit margins was in 1976, when it was measured at 0.86% before adjustment and 0.23% after inflation was factored in.

In yet another category, return on net worth, there was a decline from 14.4% in 1979 to 13.8% last year. After accounting for inflation, this indicator's actual 1979 performance, — 2.5%, fell further, to — 3.7%. Again, 1976 marked the last real gain,' with the 12.1% translating into a 3.2% gain after adjustment.

Making a more detailed examination of the three key indicators, the FMI study found that "small" firms—those doing sales of $10 million or less annually—had re-emerged as the industry's performance leaders in 1980.

In the profit-margin category, the small firms posted an aggregate profit margin of 1.25%, while firms doing more than $10 million in annual sales recorded a 0.9% profit margin in 1980.

In 1979 and 1978, the larger firms —for the first time during the 1970s— outperformed the small companies. Some industry analysts said repetition of big-firm dominance would indicate a basic change in industry operations.

Small supermarket firms posted a 20% return on net worth in 1980, versus a 13.6% posted by stores doing more than $10 million in annual sales. In this category, too, analysts were looking to see whether large firms could repeat the dominance they had enjoyed over small companies in 1978 and 1979.

Return on total assets showed the small firms had posted an 8.4% return, almost double the 4.% recorded by the large companies.

In making the big-store-vs.-small-store comparison, the FMI study did not factor in the effects of 1980 inflation.

For his part, Hammond said, it is not yet possible to discern any trends in whether small firms have certain advantages over large ones. However, he said, "we're probably seeing more flexibility in the industry as a whole. There is more flexibility in changing the mix of stores, as well as on the balance sheet.

"Most firms now are looking for innovative sources of capital. Since high interest rates make it very difficult for a firm to (secure) debt from traditional sources — such as banks — the industry has had to be more conscious about meeting its expansion funding needs with internally generated capital," he added.

Effective Tax Rate

In 1980 the FMI study for the first time, plotted the growth in supermarkets 'effective tax rate," which is the taxes paid by a company, divided, by its inflation-adjusted income. This method, Hammond said, gives a truer picture of the tax burden borne by food retailers.

For example, a calculation of tax rates, without adjustment for inflation, showed supermarkets' tax rates have been reduced from 44% in 1978 to 40% in 1979, and down to 35% last year.

However, after accounting for the erosion of purchasing power of money earned by retailers, the study found their effective tax rate had climbed from 105% in 1978 to 149% in 1979, then zoomed upward to 381% last year.

Studies have indicated food retailers have among the highest tax rates of all industries nationwide, Hammonds said, but he could not give specific data for other industries' effective rates.

"What this information really shows," he said, "is that the (retail food) industry needs to pay close attention to various tax reform measures. For example, there is a plan to allow energy tax credits for manufacturing facilities but not food companies.

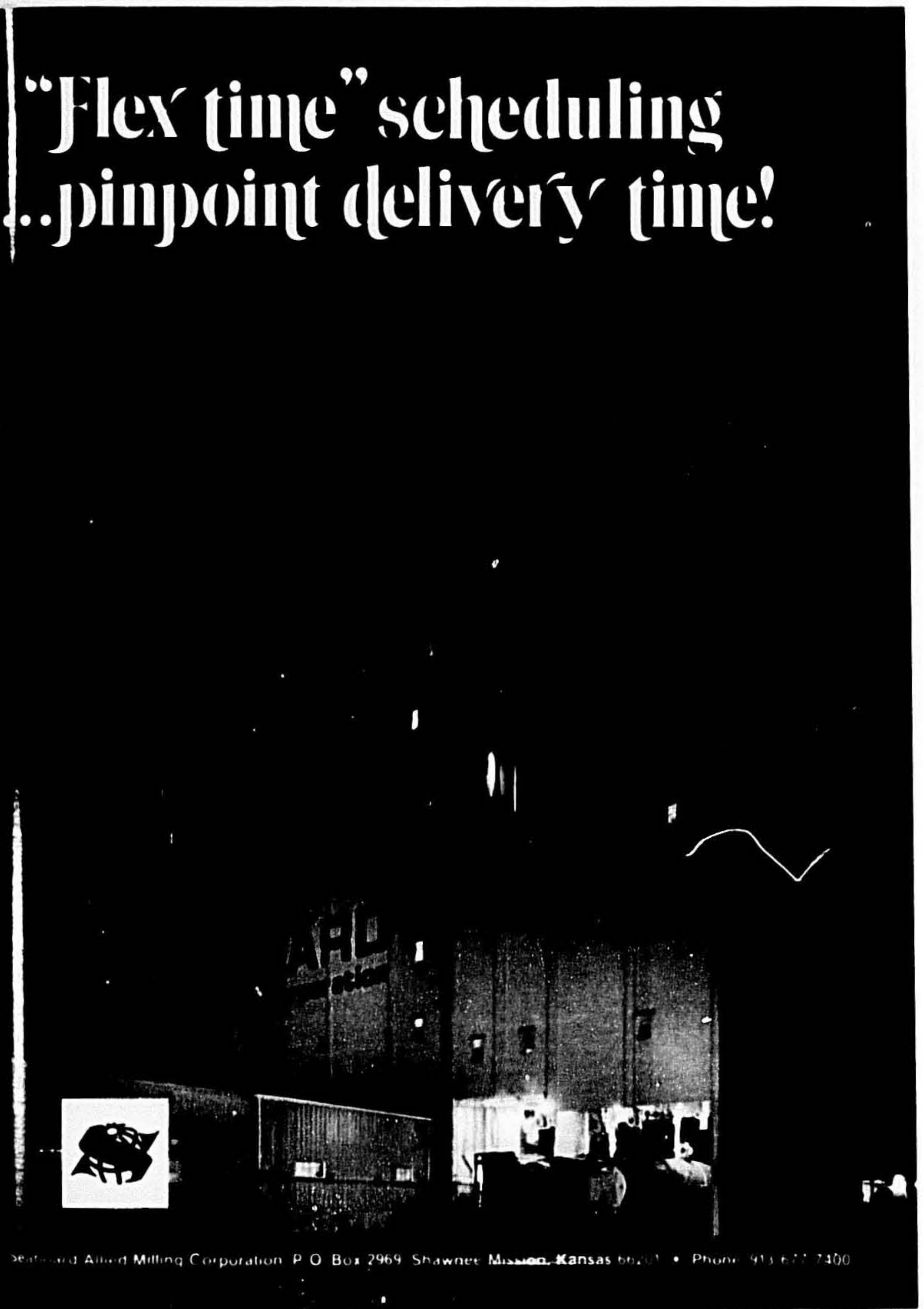
"As an industry, we have to continually point out the fact that the Government tends to think of manufacturing when it thinks of industry. We must call its attention to the fact that retailing is important but in some aspects is different from the manufacturing sector."

NFBA Promotions

The National Food Brokers' Association has promoted three. Charles Haywood, who joined the association in 1968 as director of management development, was named executive vice president and chief operating officer. Janis Hoffman, with NFBA since 1960, was named vice president, convention. Michael C. King, who joined the association in 1975, is vice president, business development.

Thinking Forward

"You can't have a better tomorrow if you are thinking about yesterday all the time." — Charles F. Kettering, inventor extraordinary.



NATIONAL PASTA ASSOCIATION
WINTER MEETING

FEBRUARY 28-MARCH 3, 1982 — THE BREAKERS, PALM BEACH, FLORIDA 33480

Sunday, February 28

Registration Desk in North Room F
10:00 a.m. Executive Committee Meeting in Flagler Board Room
3:00 p.m. Board of Directors Meeting in Flagler Board Room
7:00 p.m. Welcoming Reception in Mediterranean Court
8:00 p.m. Dinner Meeting with presidential address in Venetian Ballroom

Monday, March 1

9:00 a.m. Setting the Annual Plans for 1982-83
General Session in the Mediterranean Ball Room for the Industry Advisory Council, Government Affairs Council, Technical Affairs Council, and Internal Affairs Council
12:00 noon Consumer Affairs Council luncheon meeting in North A
2:00 p.m. Tennis Mixer at the Tennis Club
7:00 p.m. Suppliers' Social at the Beach Club
8:00 p.m. Italian Dinner at the Beach Club

Tuesday, March 2

9:00 a.m. General Session in the Mediterranean Ballroom
Product Promotion Report by Elinor Ehrman, Vice President, Burson-Marsteller
The Role of Associations in Manufacturer-Distributor Relationships
Issues and Answers by Thomas K. Zaucha, President and Chief Executive Officer of the Cooperative Food Distributors of America, Washington, D.C.
The Distributors' Perspective by Joseph E. Ahern, President and Chief Executive Officer of United Grocers, Inc., Portland, OR
The Manufacturers' Perspective by Ed Mooney, The Ed Mooney Company, Inc., Orleans, MA
Bridging the Gap — the Role of Associations by Thomas A. Zaucha
Reactor Panel moderated by Ed Mooney: Thomas K. Zaucha, Joseph E. Ahern, Ted J. Settany, Joseph P. Viviano, Anthony H. Gioia
1:00 p.m. Golf Tournament on the Ocean Course
7:00 p.m. Suppliers' Social in the Mediterranean Ballroom
8:00 p.m. Dinner-Dance in the Venetian Ballroom

Wednesday, March 3

8:00 a.m. Breakfast Meeting for Macaroni Manufacturers in North A and B
Breakfast Meeting for Millers in North C and D
Breakfast Meeting for Suppliers in North H and I
9:00 a.m. General Session in Mediterranean Ballroom
Dr. Thomas A. McGrath, Professor of Psychology in the Graduate School of Education at Fairfield University, Fairfield, CT, will conduct a Seminar for Husbands and Wives on "Management for the '80's — Theory Z and Beyond: You the Manager"
12:00 noon General Luncheon in Starlight A
2:00 p.m. Board of Directors Meeting in Flagler Board Room
Adjournment by 5:00 p.m.

About the Speakers

Thomas K. Zaucha

Thomas K. Zaucha is president and chief executive officer of a national trade association located in Washington, D.C., the Cooperative Food Distributors of America (C.F.D.A.). He is also president and chief executive officer of Grocers' Fixtures and Equipment Company (GFE). Before Mr. Zaucha assumed leadership of these organizations they were headquartered in Illinois; Mr. Zaucha relocated the association and company to the District of Columbia when he was named president in 1978.

C.F.D.A. is the national trade association which represents the retailer-owned system of food distribution. Its 69 members service over 26,000 supermarkets in the United States and Canada.

GFE negotiates national volume discount equipment and fixtures contracts for the benefit of the independent supermarket operator and his cooperative warehouse. Since headquartering in Washington the Company has reported both record sales and rebates to its members.

Mr. Zaucha has been a resident of the Washington metropolitan area for the past 14 years. He received a bachelors degree in Economics from the University of Pittsburgh and did graduate work in Communication Theory and Public Address at American University.

Mr. Zaucha has had extensive experience in the field of public affairs. From 1976 to 1978, he was national director of government affairs for the A & P Tea Company. For four years before that, Mr. Zaucha was with the National Association of Food Chains as director of public affairs. From 1970 to 1974, he was assistant director of government affairs for the National Canners Association, and was also a senior advisor to the industry's consumer relations program.

Mr. Zaucha, from 1967 to 1970, was an instructor of Speech Communications at George Washington University. For five years he was a part-time instructor at Federal City College, and for seven summers was an instructor at Georgetown University.

His involvement in community activities include past secretary of the Citizens for a Better Montgomery County; past president of his local Civic Association, and participation on the County Executive's Special Planning Task Force.

Mr. Zaucha resides in Potomac, Maryland, with his wife and daughter.

Joseph E. Ahern

Joseph E. Ahern is General Manager and Chief Executive Officer of United Grocers, Inc., Portland, Oregon.

He joined United Grocers in March, 1974 as assistant general manager. He has been president and chief executive officer since October, 1974.

From 1958 through 1968, Ahern was with Pepperidge Farm where he served as plant manager of the bakery division and regional sales manager of its frozen food division.

He joined the Alberto Culver Company in 1969 as vice president of manufacturing and from 1970 through 1974, he served as president of Dressel's division of American Bakeries Company.

Ahern holds an MBA from Northwestern University.

Ed Mooney

Ed Mooney is a food distribution industry communicator whose work includes his widely read newsletters, and his efforts as catalyst for meaningful interaction between manufacturer and distributor.

He writes and publishes AD HOC, the management dialogue newsletter for food industry manufacturers and chain and wholesaler executives.

He writes and publishes GRASS ROOTS, the retail dialogue newsletter for food industry manufacturers and supermarket/food store managers and owner-operators.

He is the author of the book FROM THE BUYER'S SIDE, a third party perspective of the buyer-seller interrelationship in the food distribution industry.

He is advisor to major food cor orations, participant on numerous national and regional food industry onvention programs, lecturer at col ges and universities, and is a directc of Sales Force Companies, Inc., Chic go-based food brokerage organizatic

Following World War II servi in Europe, Ed Mooney was a s ior salesman for Gerber Baby Foods. ter he became National Circulation les Manager for EVERYWOM 'S MAGAZINE. He was a grocery roduct marketing/account executive ith Compton Advertising, Inc., served ith LIFE MAGAZINE as Merchand ing Manager, and was Editor and Pub cation Director of CHAIN STORE GE SUPERMARKET MAGAZINES

Ed Mooney and his wife Jean ine reside in East Orleans, Cape Cod, Massachusetts. They have eight children and seven grandchildren.

C ains Take Industry Lead

The co-op or unaffiliated retailer, w o has been the pace setter for the su ermarket industry, may be losing th leadership role to the chains and h hly disciplined voluntaries, which to al intents and purposes act like a ch in, Michael DeFabis, president of P ston-Safeway, Indianapolis, told the re ent Cooperative Food Distributors of America executive management co ference.

DeFabis said much of the criticism in that relationship as far as the co-op is concerned can be attributed to the fact that its staff personnel think in terms of wholesale, whereas they should be thinking in terms of retail.

Although warehouse and distribution problems cannot be overlooked, the reason for the existence of the co-op and any wholesaler is to supply the retailer, he said.

In an informal poll DeFabis made among members of co-ops and managerial staffs, that outlook — wholesale opposed to retail — came through in many of the faults found among those he polled.

Most decisions by co-ops tend to be made on the basis of benefit to the wholesaler rather than the retailer, most respondents charged. Most wholesalers don't know the real needs of the retailer, they said.

Large vs. Small

Within the co-op there are continual struggles between large and small me mbers; credit terms are said to be un qual, and major decisions are usual made for the benefit of the larger m nbers, DeFabis said he had found in olling co-op members.

nother fault cited by many is that as ne founders of the co-op movement re e, their successors are not measur g up to that original leadership, he aid. There are basically two types of o-op management, DeFabis said: Th autocratic type in which one man do inates the co-op or the weak manag -strong committee system under wh ch committees rule the roost. Co-op have become attractive targets for ta overs, DeFabis said, because of m ny of these reasons.

lthough 43% of manufacturers in on survey said they felt trade relatio s had improved in the past year, only 34% of food distributors felt relations were better. This was one of the findings in the survey as reported by Ed Walzer, publisher and editor of Progressive Grocer.

Yet when asked about their own firms' relations with others in the trade, 59% of the manufacturers and 53% of the distributors felt relations had improved. Both groups felt the back-haul situation had led the area of improvement, with 88% of the manufacturers and 67% of the distributors sharing this belief. However, on improved buyer competence, while 79% of the distributors noted gains, only 57% of the manufacturers agreed.

Spending for Pasta Products from Supermarket Business Magazine:

Year	Spaghetti	Macaroni	Noodles	Value of Total Domestic Consumption
1970	$195,740	$157,030	$126,760	$479,530
1971	$197,930	$159,150	$127,800	$484,980
1972	$216,340	$172,630	$137,510	$526,480
1973	$256,150	$214,410	$174,230	$644,790
1974	$284,840	$232,850	$189,390	$707,080
1975	$308,770	$249,620	$199,430	$747,820
1976	$331,620	$265,850	$198,710	$796,180
1977	$345,550	$274,090	$202,290	$821,930
1978	$370,080	$291,360	$221,310	$882,750
1979	$395,250	$312,630	$233,040	$940,920
1980	$428,060	$337,330	$250,290	$1,015,680

Some Manufacturers Bypass Brokers

There has been an increase in the practice of manufacturers bypassing their brokers in selling to certain customers, Mark Singer, president of the National Food Brokers Association said at the group's annual meeting.

Much of this increase has been in the food-service area and among private-label manufacturers, Singer said. He attributed the latter to increased sales of generics. The practice is unfair to other retailers and wholesalers, Singer said, since brokers cannot be expected to provide the full level of quality service for an account when they are not calling on all distributors in their area and therefore not getting their full commission. To expect the broker to do so "is plainly unrealistic," he said.

In addition, according to Singer, this practice may spawn preferential pricing, which is illegal under the Robinson-Patman Act.

Two Methods Used

Two methods are being used, he said. One involves direct selling by the manufacturer. The other entails the distributor designating the representative who will sell it the manufacturer's product.

"Sometimes they (the manufacturers) play a charade by appointing a special representative designated by the consumer,' 'he noted, and the broker 'will have to apply his major efforts with those principals and those customers who give him 100% support.

Singer added that "the customer, whether a wholesaler, chain or buying-group headquarters, is not entitled to an unearned preferential price not available to its competitors. "There are names for these predatory operators," he charged. "They are raiders—raiders of the competitive free-enterprise system."

Singer also contended that if any price advantage happens to be passed on to the local operators, it often will not offset the value of these services that can no longer be provided by the broker.

The bypassing of the food broker is a short term outlook for the manufacturer which will be detrimental to him in the long term, he charged. "Will the (manufacturers) allow their companies to become a pawn of the raiders? Will they allow themselves to be dominated and used and then discarded when it suits the raiders?"

To combat such practices, Singer recommended brokers speak out to their customers "to show the value of services you provide on behalf of your principles."

The NFBA head also called for a closer liaison between manufacturer financial people and the sales and marketing arms. "The financial department needs to recognize that the broker is not an outsider. He is not a supplier, he is not a vendor."

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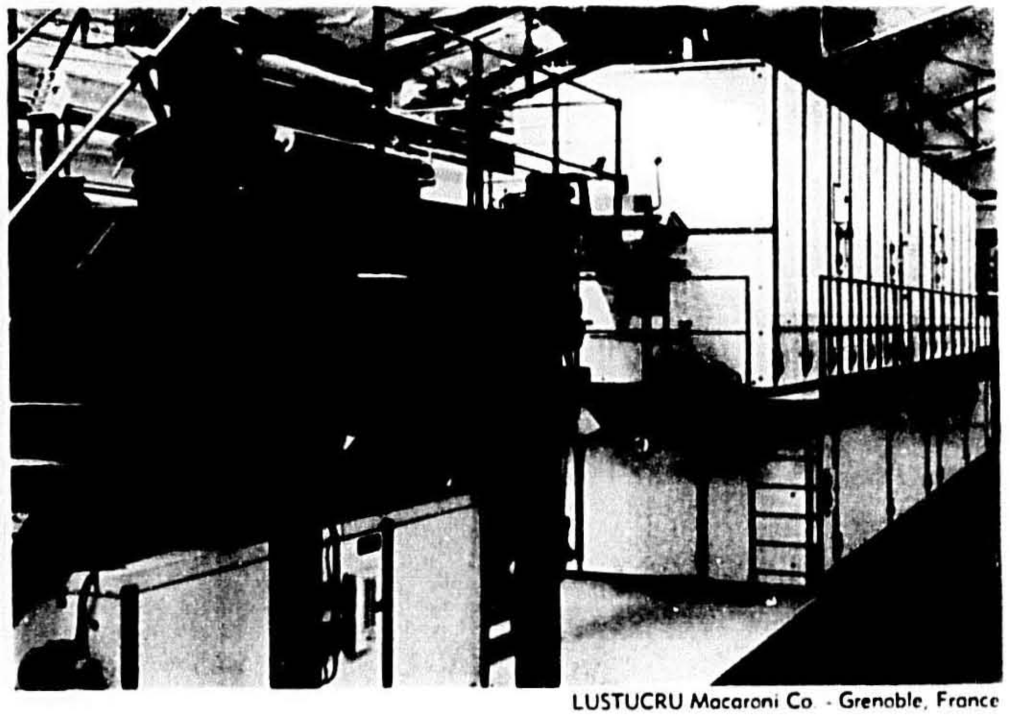
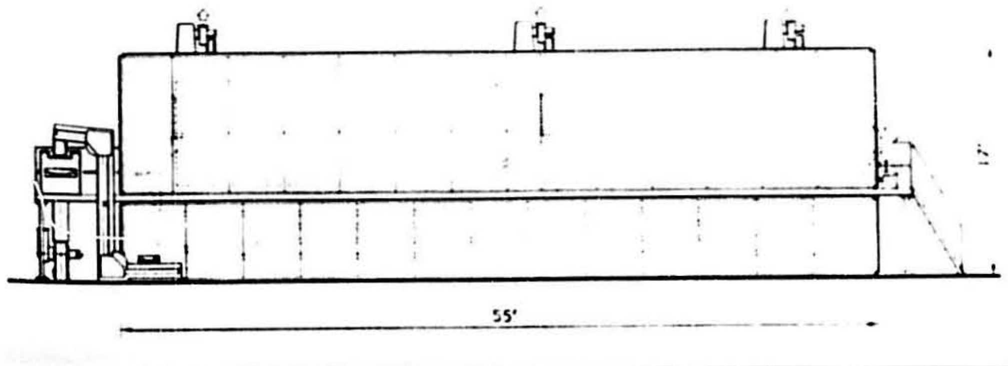


LUSTUCRU Macaroni Co. - Grenoble, France

BRAIBANTI has in operation a new high temperature drying line for a wide variety of short pasta shapes:

- Cobra 1000 press with two 16" diameter die holders
- Shaker type TM/1000 AT
- 2 Metal rotary dryers model Romet 24/8
- 1 Finish dryer type Teless ATR/17/4
- 1 Cooling shaker



Improved Gloss on Polyethylene-Coated Cartons

International Paper Company has introduced new, special high gloss inks for its Fresh-Shield* polyethylene (PE) - coated folding cartons, giving them superior gloss. The new cartons were displayed at IP's booth during the WestPack show.

These PE cartons, when printed with the special inks, have markedly improved resistance to abrasion, the company said. In scuff tests, gloss on waxed cartons was reduced by 33 percent, while the Fresh-Shield cartons lost only an average of 13 percent of their gloss.

PE vs. Wax

Because of the physical differences between wax and PE, IP indicated that its Fresh-Shield cartons also resist scuffing better than waxed cartons on the packaging line, in transit, and at the retail store. In addition, Fresh-Shield cartons do not crush or wilt as easily as waxed cartons because they retain their stiffness. The company reports that during freezer storage tests, its PE cartons lost an average of only 25 percent stiffness, while waxed cartons lost 45 percent.

Other advantages with the Fresh-Shield carton include reduction of product moisture loss, superior flexibility and toughness, and less downtime on automatic cartoning equipment because there is no wax build-up.

Further information on IP's PE-coated carton may be obtained by writing International Paper Company, 77 West 45th Street, New York,NY 10036, or call (800) 223-1268; In New York (212) 599-3194.

* Registered trademark of International Paper Company.

Slipsheets, the Future of Utilization . . . Today

"As a result of rising distribution costs and a growing disenchantment with wooden pallet exchange systems, many companies are turning to fibreboard slipsheets as a method for shipping, storing, and distributing unitized product loads," William V. Driscoll, vice president, American Paper Institute said at the Physical Distribution Equipment Exposition in St. Louis. The show was sponsored by the National-American Wholesale Grocers' Association.

"Fiberboard slipsheets," Mr. Driscoll continued, "are flat sheets of corrugated or solid fibreboard with edge tabs that are used with materials handling equipment to move unitized loads. There is a trend to slipsheets, as a replacement for the conventional wooden pallet because shippers and receivers benefit by getting cost reductions of 80-90% in materials, 10% better space utilization, and significant reductions in transportation costs. A wide variety of products such as foods, drugs, chemicals, beverages and appliances are being successfully handled on slipsheets."

Ad Bureau Sells NABSCAN Division

The Newspaper Advertising Bureau has sold its NABSCAN division to a group of research companies and individual investors, an NAB spokesman said.

NAB would not reveal the names of the buyers or the purchase price. NABSCAN, which stands for National Advertised Brands Scanning Reports, gathers weekly scanner-check-out data from more than 450 supermarkets in 30 states.

Jack Kauffman, NAB president, said the bureau had decided to sell the NABSCAN division because it might eventually become bigger than the bureau. And since the bureau's mission is to sell newspaper advertising, rather than operate a market research company, we decided somewhat reluctantly that NABSCAN belonged outside the bureau."

NPA Plant Operations Seminar, Chicago, Apr. 27-28

EEC Industrial Packaging Market to Reach $11.4 Billion by 1990

Sales of industrial packaging materials in European Economic Community nations will build from $9.57 billion in 1980 to $11.4 billion by 1990 (in constant 1980 dollars), an increase of 19.1%, forecasts Frost & Sullivan, Inc.

Growth in the market will be somewhat uneven, however, with downturns in 1981 and again in 1985. "The growth prospects for the market as a whole are very closely related to the economic performance of EEC countries and to world trade in general," the marketing research firm notes in its new study, **Industrial Packaging Products And Associated Machinery Markets in Europe.**

"Growth rates for industrial production between 1982 and 1985 are expected to be in excess of 3% per annum for most countries, with the exception of the U.K. and Ireland where growth — particularly in the U.K. — wil be slower," the report states. "In 1985, the cyclical effect of most economies will see a downturn, while between 1986 and 1990 growth rates of between 3% and 3.5% are forecast for all countries, with the exception of the U.K., which is forecast at 1.6% per annum."

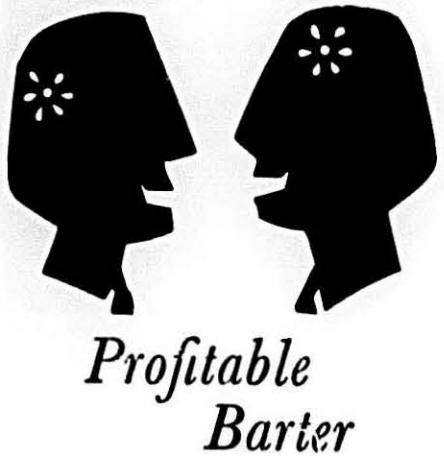
Throughout the decade, West Germany and France are expected to continue as the top two markets for industrial packaging materials. Sales in Germany are projected to rise 31.4% during the decade from $2.42 billion in 1980 to $3.18 billion by 1990, with France seen mounting 22.2% from $2.07 billion to $2.53 billion. The U.K. will yield third position in 1983 to Italy. Sales in Italy are forecast to advance 16% over the decade from $1.87 billion to $2.17 billion, while the U.K. edges up just 4.8% from $1.89 billion to $1.98 billion.

The 344-page report spotlights paper sacks, solidboard and wooden crates as declining sectors, and characterizes corrugated fiberboard, plastic sacks and shrinkwrap as being in the mature phase of their life cycle. Targeted for growth are heavy-duty corrugated, stretchwrap and Big Bags. The latter —large bags, with a 0.5 ton-1.15 ton capacity, which can replace forty [illegible]kilogram sacks, plus a pallet and often a shrinkwrap or stretchwrap covering —are becoming particularly popular in the chemical and fertilizer industries.

Cost of Fuel and Shipping

Two major factors shaping the future of the outer packaging business are the cost of fuel and shipping. As these costs continue to rise, the need grows for lighter, more cost-effective packaging (e.g. — Big Bags), the report points out.

(Continued on page 42)



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Step number two is ot attend their next meeting. And take an idea along with you. You're bound to at least double it before you leave.

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EEC Packaging Market

(Continued from page 40)

The segment suffering most is the wooden crate. "Their use in the export of machinery and parts is slowly being eroded by heavy-duty corrugated, primarily because it is cheaper, lighter and can be stored flat," Frost & Sullivan observes. "Other applications, such as drink, fruit, vegetables and produce have almost totally converted to either corrugated, solid fiberboard, or in some cases, plastic crates."

Also contributing to growth of heavy-duty corrugated is the continuing attempt by such major users as the chemicals industry to reduce their variable costs by shipping in larger packs, making such stronger packaging materials as heavy-duty corrugated more attractive. All told, heavy-duty corrugated is expected to increase its share of the industrial packaging market from about 5% at present to between 8% and 10% by 1990.

Shrinkwrap had enjoyed major gains in recent years — especially in food and drink packaging — as a pallet wrapping material because it protected the pallet while still allowing for visibility. However, 'the lower material costs, lower capital investment and, of greater importance, the significantly lower energy costs associated with stretchwrap, make it inevitable that stretchwrap will make significant penetration in this market," the study says. "Those companies who have made the investment in shrink tunnels or hoods are unlikely to change to stretchwrap in the short term, but one can expect a gradual change as these investments require replacement."

For further information, contact Customer Service, Frost & Sullivan, Inc., 106 Fulton St., New York, NY 10038, (212) 233-1080. Report #E440.

Wright Machinery Service Guarantee Program

Wright Machinery, one of the oldest manufacturers of verticle FFS packaging machinery in the United States, has introduced a new parts and service program designed specifically for Wright Machinery customers. The program guarantees Wright customers delivery of tube former assemblies in four-weeks from date of order and receipt of sample film for most sizes.

Wright's Tube Formers are available in a wide range of sizes and configurations for Wright FFS machines. With Wright's short lead time guarantee, customers can now replace damaged or worn tube formers with original equipment direct from the manufacturer, an assurance of proper tolerances and quality performance. All verticle form/fill/seal machines built by Wright Machinery, regardless of age, can be promptly supplied with most sizes of Tube Formers under this new service program.

For more information or to place an order under this new program, contact Wright Machinery, Durham, NC 27702 or a Field Sales Representative for Wright Machinery. Wright Machinery is a division of Rexham Corporation.

Volpi Affiliates with Demaco

Volpi & Son Machine Corporation —SoBrook Division, of East Farmingdale, Long Island, New York (formerly of Brooklyn, New York) is proud to announce a product line affiliation with De Francisci Machine Company (Demaco) of Brooklyn, New York

Volpi & Son is primarily involved in the manufacture of Chinese Noodle machinery and had formerly been associated with Giacomo Toresan of Milan, Italy in the importing of small to mid size pasta machinery as exclusive representatives for the North American Continent. The Volpi-Toresani association was dissolved in June, 1981.

As befitting a "Made in U.S.A." package, the Volpi-Demaco combination encompasses research and development on the part of both companies with Volpi manufacturing the Chinese noodle machine line at their Long Island facility and Demaco producing the Italian line from Brooklyn.

Volpi will also be turning out its own small pasta machinery line; effectively taking up the slack left by the Toresani termination. Additionally, a joint venture into the smaller equipment field will be presented in May, 1982 at the N.R.A. (National Restaurant Association) Show in Chicago, Illinois.

Both companies are collaborating on continuous line equipment — R & D and manufacture for the Chinese Noodle and Italian Pasta Fields.

Volpi is manufacturing doughbreakers, batch mixers, automatic skin and noodle cutters, folder stackers and related equipment.

Demaco is manufacturing Automatic Sheet formers with its continuous mixers and pre-sheeters as well as an Automatic One (1) Pounder Egg Roll Doughskin Machine.

Mr. John Amato is a Manufacturers Representative for both Volpi & Demaco.

Volpi and Demaco are independent companies collaborating on equipment to compete with the recent influx of Japanese equipment into the United States.

DeFrancisci Acquires Clermont

The Clermont Food Machine Company with all of its assets has been sold to DeFrancisci Machine Corporation. They will continue building machines under the Demaco name.

John Amato of Clermont will now represent the DeFrancisci Machine Coropration as Director of Sales & Service.

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